

5-2017

## A Shared Space: The Collaborative Alliance Between the College of Charleston Special Collections and the South Carolina Historical Society Archives

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### Recommended Citation

Fairchild, Mary Jo; Inabinett, Molly; and Minor, Joshua, "A Shared Space: The Collaborative Alliance Between the College of Charleston Special Collections and the South Carolina Historical Society Archives," *Provenance, Journal of the Society of Georgia Archivists* 34 no. 2 (2017).

Available at: <https://digitalcommons.kennesaw.edu/provenance/vol34/iss2/5>

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## **A Shared Space: The Collaborative Alliance Between the College of Charleston Special Collections and the South Carolina Historical Society Archives**

Mary Jo Fairchild, Joshua Minor, and Molly Inabinett

### **Introduction**

On a balmy December morning in 2014, archivists, librarians, and administrators at the South Carolina Historical Society and the College of Charleston embarked on a space and resource-sharing partnership that was defined over the course of the previous eighteen months. Countless hours of planning and negotiating precipitated the arrival of professional movers at the headquarters of the South Carolina Historical Society. Under the guidance of staff members, the specialized crew proceeded to load nearly 5,000 linear feet of manuscript material and more than 3,000 rare books and monographs onto large trucks for the 1.1-mile journey northwest to a new shared space within the Special Collections department at the College of Charleston's Marlene and Nathan Addlestone Library. In less than two years, collections separately owned by the two repositories were co-located. A single service desk and community reading room became shared access points.

While the combined holdings and services of the South Carolina Historical Society and the College of Charleston allow for each organization to grow its influence and constituency, the collaborative process was not without sacrifice or difficult decisions. During the relocation exploit, partners encountered many opportunities to address and remedy everything from stale policies to growing pains. Distilling lessons learned from the process of condensing archival spaces and personnel to create a deeply rich repository for historical research and inquiry begins with understanding the antecedents and evolution of this partnership. In this article, contributors from both partner organizations discuss the deployment of project management strategies, creation of workflows to prepare facilities and relocate collections, communication, coordination of publicity, and solutions to challenges encountered during the initial 24 months of the partnership. It is our aim to offer takeaways that may prove helpful to other archivists facing analogous change scenarios.

## **Background**

The South Carolina Historical Society is the largest and oldest private repository of archival materials in the state. Established in 1855, the South Carolina Historical Society is governed by an independent Board of Managers and financed through an endowment and membership dues, with grants from both private and government agencies providing supplementary funds for special projects. With an annual budget of just over \$700,000 and a staff of 12 employees, the South Carolina Historical Society leverages priceless holdings to serve thousands of researchers annually, conduct educational outreach, plan programming, install exhibits, and raise awareness.

Founded in 1770, the College of Charleston is the oldest educational institution south of Virginia, and the 13th oldest in the United States. The Special Collections department was founded to support the teaching and learning mission of the College of Charleston and to promote scholarship on the South Carolina Lowcountry and the broader Atlantic World. With a staff of 65 full-time employees, the annual budget of the College of Charleston library is \$5.5 million. Special Collections holdings include over 600 manuscript collections related to the history and culture of the South Carolina Lowcountry, the archives of the College of Charleston, and more than 40,000 rare books and pamphlets.

The seeds of the collaborative partnership between the South Carolina Historical Society and the College of Charleston were sewn in the late nineteenth century. The first public meeting of the South Carolina Historical Society was held on campus in 1856 and both institutions share common historical leaders and trustees. The promise of a 21st century partnership between the South Carolina Historical Society and the College of Charleston was sparked when administrators at the South Carolina Historical Society embarked on a journey to explore new storage and access options for the archives given that the two most valuable assets of the organization—the priceless holdings and the landmark Robert Mills Fireproof Building—no longer complemented one another.

Constructed in the 1820s to house historically significant records and administrative offices for the state of South Carolina and later the county of Charleston, the Fireproof Building is located at

100 Meeting Street in the heart of historic Charleston. The three-story brick and masonry structure was designed by architect Robert Mills to resist fire, a primary bane of urban existence in the 19th century. In addition to using fire-resistant materials such as stone, brick, iron, and copper, Mills also mandated that significant space separating the Fireproof Building from surrounding edifices be reserved. Windows on all exterior walls and a skylight to illuminate the central portion of the building mitigated requisite artificial light sources, also contributing to the fireproof design.

The South Carolina Historical Society purchased the Fireproof Building from the county of Charleston in 1971 and made substantial renovations to retrofit the 19th-century structure with modern amenities, including climate control and improved lighting and plumbing. Forty years later the retrofitted HVAC system limped along and imperiled the archival documents stored and accessed inside the building. Charts generated by archival hygrometers showed extreme fluctuations in temperature and relative humidity each day, especially in the thick lowcountry summer months. The necessary environmental upgrades to the Fireproof Building were prohibitively expensive and would require a multi-million dollar capital campaign.

Faced with embarking on a major fundraising effort, administrators consulted with archival staff who also emphasized the importance of exploring expanded storage capacity for archival objects. While the ceaseless in-flow of new collections of family papers, business and church records, historic pamphlets, and plats is a testament to the overall health of the archive and the organization responsible for stewarding the holdings, storage capacity presented a second hurdle for the South Carolina Historical Society if they were to maintain archival operations in the Fireproof Building. Space for continued collection expansion simply did not exist on-site.

### **A Cross-Institutional Partnership**

Allies in the quest to preserve and provide access to historic records and information at the College of Charleston recognized the benefits of inviting the South Carolina Historical Society's archives program to campus. A sympathetic new Dean of Libraries and supportive history faculty became effective advocates for investing in structural improvements requisite for the Addlestone Library to

become the new headquarters for the South Carolina Historical Society's archival operations.

It is important to note that, at least in the short term, both institutions had a great deal at stake. For the South Carolina Historical Society, the risk of losing institutional autonomy had the potential to manifest in a dip in dues-paying memberships. For the College of Charleston, consolidating the entire print collection to the second floor in order to expand archival storage space on the third floor had the potential to manifest in decreased use of published items in the circulating collection. Because partners at both institutions placed high value on the long term benefits of thriving archives programs, what archivist Larry J. Hackman called the "critical carriers of archives over time," plans to address and mitigate these risks were deployed immediately.<sup>1</sup> For example, the South Carolina Historical Society doubled primary source object-based outreach efforts while the Collection Development and Public Services departments in the Addlestone Library devoted extra energy to ensuring students and faculty continued to have broad access to the resources required to support the curriculum, whether print or electronic. Before detailing the strategies and workflows created to bring the aspirations of the partnership to fruition, a brief review of literature and other shared service models in academic libraries can provide context.

### **Literature Review**

It would not be inaccurate to say that the nature of the partnership between the South Carolina Historical Society and the College of Charleston Special Collections is unique in both the circumstances and the distinct missions of the institutional collaborators. There is no single model for planning and measuring this unconventional partnership. However, we can certainly draw key lessons from studies of partnerships between repositories and cultural heritage organizations with similar goals. Literature and best practices for management of archival repositories sanctioned and validated the South Carolina Historical Society's decision to relocate

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<sup>1</sup> Larry J. Hackman, "Ways and Means: Thinking and Acting to Strengthen the Infrastructure of Archival Programs," in *Leadership and Administration of Successful Archival Programs*, ed. Bruce W. Dearstyne (Westport, CT: Greenwood Publishing Group, 2001), 37.

its archival holdings and the College of Charleston's decision to reconfigure and expand public and storage spaces in the library. For example, the archivists and librarians who worked to merge two distinct departments at the University of Louisville's archives and special collections in 2012 describe many of the obstacles encountered by staff at the South Carolina Historical Society and the College of Charleston. Despite the major difference that the project at the University of Louisville was a merger between two departments already under the same administrative umbrella, many of the experiences described by contributors to the University of Louisville merger can be applied to our own efforts. Feedback from conversations amongst staff members at the University of Louisville prior to the merger led to the formation of specialized work groups, each tasked with cultivating solutions for functional areas such as reference work, staff work spaces, virtual presence, publicity, and public services policies. The University of Louisville team also emphasized the importance of documenting decisions, formalizing procedures, and cross-training staff members.<sup>2</sup>

A 2016 white paper, "*Prospects and Strategies for Deep Collaboration in the Galleries, Libraries, Archives, and Museums Sector*," summarizes ideas and opportunities for resource sharing both within and beyond institutional boundaries. While the summit from which this paper was produced was limited to academic galleries, libraries, archives, and museums (GLAMs), observations on innovative opportunities in the areas of exhibitions and integrated discovery of content validate work that predates the South Carolina Historical Society brick and mortar partnership with the College of Charleston. Of particular interest is the "network turn" described by Clifford Lynch which leverages digital objects to boost the profiles of repositories that are cooperating to enhance exposure and impact.<sup>3</sup> Building on pre-existing alliances with the Lowcountry Digital

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<sup>2</sup> Carolina Daniels, Delinda Stephens Buie, Rachel I. Howard, and Elizabeth E. Reilly, "Managing the Merger of Archives and Special Collections: Setting Our Own Agenda," in *Management: Innovative Practices for Archives and Special Collections*, ed. Kate Theimer (Lanham, MD: Rowman & Littlefield, 2014), 94.

<sup>3</sup> Jill Deupi and Charles Eckman, "Prospects and Strategies for Deep Collaboration in the Galleries, Libraries, Archives, and Museums Sector", *Academic Art Museum and Library Summit* (Coral Gables: January 2016), 23-24, [http://scholarlyrepository.miami.edu/con\\_events\\_aamls2016/1](http://scholarlyrepository.miami.edu/con_events_aamls2016/1).

Library, digitized content from both the College of Charleston Special Collections and the South Carolina Historical Society archives has been aggregated and discoverable in a single place since 2010.<sup>4</sup>

More recently, meaningful interpretive scholarship brings digital objects from both repositories together to weave a cohesive historical narrative in the Lowcountry Digital History Initiative, a digital public history project that draws from multi-institutional resources to inform and illustrate scholarship. An example of Lynch's "network turn" in practice is Professor Dwana Waugh's use of archival objects from both the College of Charleston and the South Carolina Historical Society (among others) for the digital exhibit on the Cigar Factory Strike in Charleston from 1945 - 1946. In many ways, these virtual opportunities for collaboration opened the door to realizing the more substantial institutional investment that is the subject of this article.<sup>5</sup>

Stakeholders in the South Carolina Historical Society partnership with the College of Charleston also examined similar organizational models in archival repositories to understand and anticipate outcomes. An exhibit catalog issued on the occasion of the 75th anniversary of the Southern Historical Collection at the University of North Carolina at Chapel Hill details how the University inherited the manuscript holdings of the North Carolina Historical Society in the 1920s. These manuscript items, collected by the North Carolina Historical Society since 1844, made possible the establishment and growth of the endowed collection at a state-supported academic entity. Unlike their counterparts in North Carolina nearly a century before, the staff and board members of the South Carolina Historical Society did not relinquish the ownership and stewardship of holdings to a larger academic entity in the partnership with the College of Charleston. Despite this difference, the North Carolina Collection at the University of North Carolina offers a powerful model for magnifying the impact of an archives

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<sup>4</sup> For more information on the Lowcountry Digital Library, see <http://lcdl.library.cofc.edu/>.

<sup>5</sup> For more information on the Lowcountry Digital History Initiative and the Cigar Factory Strike digital exhibit see [http://ldhi.library.cofc.edu/exhibits/show/cigar\\_factory](http://ldhi.library.cofc.edu/exhibits/show/cigar_factory).

program when affiliated with an established academic institution.<sup>6</sup>

In Georgia, the state historical society has benefitted at times from partnerships with public entities. According to the Georgia Encyclopedia, the Georgia Historical Society served as a branch depository of the Georgia Archives from 1966 until 1997. As a depository, the Georgia Historical Society benefitted from public funding but reverted back to a private, non-profit entity, very similar to the South Carolina Historical Society's model, in 1997.<sup>7</sup>

Finally, many presidential libraries and other large public records repositories have non-profit arms, illustrating how public-private partnerships can be leveraged to raise awareness and money for philanthropic endeavors. For example, the Abraham Lincoln Presidential Library and Museum, administered by the National Archives and Records Administration, partners with the Abraham Lincoln Presidential Library Foundation to support educational and cultural programming, foster scholarship, and promote greater appreciation of history through exhibits, conferences, publications, and other activities designed to promote historical literacy.<sup>8</sup>

### **Defining the Partnership**

To formalize the nascent partnership, a memorandum of understanding was drafted and signed by both parties. This document is essential to the process of partnering and the long-term maintenance of the alliance. Having the terms and nature of the collaboration clearly defined ensures that the expectations and needs of all parties are articulated and met. Without an initial memorandum of understanding authorized by executive level personnel at both institutions, the daily efforts required to make the partnership a continued success are difficult to bring to fruition. Important issues to address in a Memorandum of Understanding between two archival programs and their governing institutions include:

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<sup>6</sup> *Southern Sources: An Exhibition Celebrating Seventy-Five Years of the Southern Historical Collection, 1930-2005*. (Chapel Hill: Southern Historical Collection, University of North Carolina at Chapel Hill, 2005), x.

<sup>7</sup> William Harris Bragg, "Georgia Historical Society," in *New Georgia Encyclopedia*, accessed January 17, 2017, <http://www.georgiaencyclopedia.org/articles/history-archaeology/georgia-historical-society>.

<sup>8</sup> More information on the Abraham Lincoln Presidential Library and Museum can be found at <http://www.alplm.org/AboutUs/OurMission.aspx>.



- *Ownership of holdings.* Clearly defining stewardship roles using unequivocating language to define ownership enhances the confidence of all parties. For example, the memorandum of understanding between the College of Charleston and the South Carolina Historical Society states that collections “shall at all times be and shall remain the sole and exclusive property” of the respective organization “without limitation.”
- *Clear allocation of space for the collections, staff, and patrons.* This includes vault and other storage areas to accommodate the archives; workstations for staff, interns, and volunteers; and delineation of a shared reading room and service desk.
- *Maintenance of unique institutional identities.* The autonomy of the relatively small South Carolina Historical Society was of primary concern. Relocating to the College, a large and powerful institution, initially presented the perception to the public that the South Carolina Historical Society was being absorbed. Partners from both institutions learned that using words such as “merger” or “takeover” were taboo. The memorandum of understanding was one of the instruments through which great care was taken to maintain separate physical and virtual identities (e.g. signage, exhibit space, box labels, ownership of digital assets, and the naming of the reading room in honor of the South Carolina Historical Society).
- *Collection security and maintenance.* Best practices in security, as defined by SAA and ALA, were referenced in the memorandum of understanding to safeguard against theft, damage or loss by vandalism, fire, water, etc.
- *Terms of access.* Careful attention to both physical and virtual access is important. Physical access includes admittance to library patrons, students, and South Carolina Historical Society constituents during operating hours. Virtual access ensures easy navigation of the combined online catalog interface and digital objects via the Lowcountry Digital Library.
- *A seamless user experience.* In order to encourage standardization and best practices, the memorandum of

understanding mandated that joint manuals and workflows for managing and processing collections be created. Both parties also share responsibility for staffing the reference desk and serving all patrons, regardless of affiliation.

- *Terms of termination.* Although the confidence of partners may be high, it is impossible to see the future and a good exit strategy offers options and peace of mind.

While the memorandum of understanding provides direction on policy matters, it is equally important for personnel at partnering institutions to nurture colloquy and foster connections. Several months after the memorandum of understanding was signed, administrators, archivists, catalogers, and contractors called the first of many “partner’s meetings.” The goal of these meetings was to initiate discussion and identify issues pertaining to policies, procedures, and logistics for operations once the South Carolina Historical Society and College of Charleston Special Collections were co-located in the Addlestone Library. We endeavored to identify as many issues as possible, select teams responsible for drafting solutions, and set deadlines for when these teams would make their recommendations.

At the first meeting, we articulated three conceptual umbrellas under which we could address larger concerns as well as nitty-gritty details. Each of the three “parent” categories also had a number of “children” to which a team of staff members were tasked with fulfilling solution-oriented actions. Since the majority of the intellectual and policy work between collaborators had to do with shared service points and spaces, this was the first category on our list. Reproduction permissions and fees, patron registration, call slip format, public services desk staffing, reading room hours, and designated vault spaces required consensus building between the partners. For example, we cultivated a model for staffing the reference desk that embodies the spirit of the partnership. Each day consists of two separate reference shifts staffed by one representative from each repository. This not only equally divides the public services labor between the two institutions, but also breeds comradery and knowledge-sharing between new colleagues.

Objectives that concerned larger policies and procedures, what we affectionately labeled “everything else,” were second on our

list. To facilitate transparency and unbiased decision-making where collections are concerned, we asked that both partner institutions provide clearly defined collection development and acquisitions policies in writing. Since public services archivists and librarians are frequently the first point of contact with patrons and donors, we decided to proactively address the potentially troubling scenario involving a well-intentioned donor walking into the reading room, manuscript collection in hand, who proceeds to ask reference staff to accept archival material. By providing the potential donor with information relating to the scope and collection development policies and deed of gift forms for both the South Carolina Historical Society and the College of Charleston Special Collections, we can objectively inform their decision instead of vying with one another for acquisitions. Also included under this second umbrella were actions associated with disaster preparedness; workspaces for staff, interns, and volunteers; plans to assess joint services; and exhibit design and curation.

The third category on our list included the details of managing the transition. A glorified punch list, this included communicating about the structural changes that would affect the logistics of the move. Timelines for modifications to both the modular and static shelving on the third floor of the Addlestone Library would ultimately affect the date on which the South Carolina Historical Society confirmed the moving company. Less glamorous concerns such as security codes and access to protected spaces, phone lines, mail delivery, calendars, and parking also required our attention. Personnel at both entities distributed requests for proposals from moving companies, ultimately contracting the expert services of two different companies specializing in the packing and moving of archival and library materials.

Partner's meetings became an opportunity to get to know and understand the strengths of colleagues which resulted in efficient resolution of issues pertaining to workflows, logistics, and time management. During the planning stages of the alliance, team leaders on each side emerged. For instance, in the months before relocation, archivists and librarians volunteered to write standardized workflows together in order to identify changes in cataloging specifications and intellectual identification of new locations in relevant descriptive metadata fields. Ultimately, the evolution of a team-based approach

in which people with diverse skill sets were tapped to contribute was essential to the initial successes of the partnership.

### **Facility Improvements at the College of Charleston**

The relocation of the South Carolina Historical Society archives and staff into a shared space within Special Collections at the Addlestone library served as the catalyst for a larger improvement project in the decade-old College of Charleston library building. In addition to reconfiguring the Special Collections space, the library-wide project encompassed the addition of 200 seats for students, three small group study rooms, a new flexible lecture and learning space, and improved access to power outlets for laptops and other mobile devices.

Enhancements within Special Collections included expanding the footprint of the reading room to provide additional seating for students and patrons. The shelving capacity of the reading room was also increased to accommodate the South Carolina Historical Society's reference books. The most visible of the exhibit cases that line the exterior wall of the reading room was reoriented and enlarged.

Prior to the to the reconfiguration, archival materials and rare books held by the College of Charleston resided in two temperature and humidity controlled vaults: a “north” vault with a capacity of 6,598 linear feet of storage for manuscripts and oversize materials; and a “south” vault with a capacity of 5,688 linear feet of storage for rare books. Additional storage consisting of 117 flat file drawers was located outside of the vaults. Post-reconfiguration, which included retrofitting and adding 150 flat file drawers, the linear footage of the north vault (now housing the South Carolina Historical Society’s collections) was reduced to 5,043 linear feet. The capacity of the south vault (now housing the Special Collections holdings) also decreased with the addition of 30 new flat file drawers, to 5,490 linear feet.

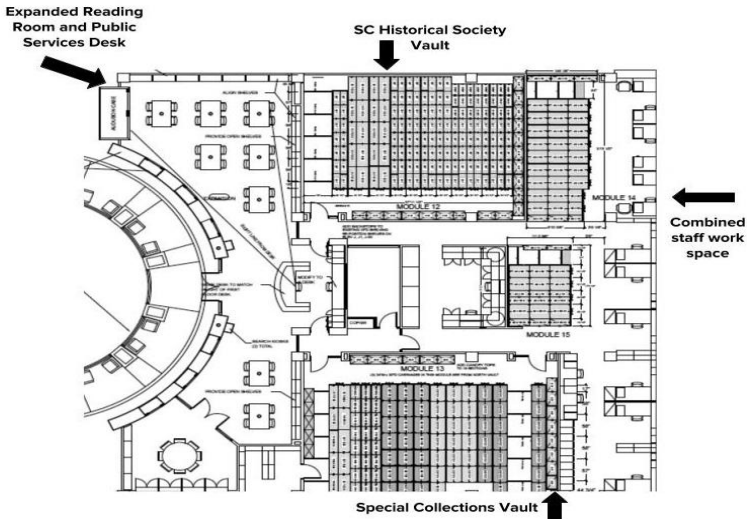


Figure 1: A structural diagram of the proposed new layout of the Special Collections space on the third floor of the Addlestone Library modified to provide expanded storage for the holdings of the South Carolina Historical Society and a larger reading room for increased researcher traffic

An additional 12,020 linear feet of supplementary locked mobile shelving, including 225 flat file drawers, was installed outside of the reading room. A separate processing room with 369 linear feet of shelving space for collections being actively processed as well as additional staff workspace was also created. Ultimately, all improvements to the shared space and third floor of the Addlestone library doubled the storage capacity for archival materials and special collections.

### Preparing Holdings and Collections

A considerable segment of the work that the College of Charleston Special Collections and the South Carolina Historical Society tackled in advance of the partnership's full realization consisted of preparing manuscript and published collections for co-location at the Addlestone Library. Staff at both repositories labored to relabel boxes for consistency and clarity, rehouse collections stored in acidic or worn containers, and wrap oversize volumes in new buffered paper. These efforts clarified the ownership of collections while also addressing preservation concerns inherent in the wear and tear archival housing is subject to over time and use.

Space Location	Shelf Location	MSS#	Collection Name
A	A-65 Ibox 1)	0001	Middleton Family Artwork, 1803-1867
A	A65-A67 (box 1-9), AA64 (box 8)	0002	William Martin Aiken Papers, 1878-1956
C	C56 (box 1-4)	0003	Bacot Family Papers, 1860-1938
C	C56-C58 (15 volumes)	0004	Bank of Charleston records, 1837-1874
C	C58	0005	The Story of South Carolina, 1926
C	C58 (box 1), AA1-AA2 (box 2-8)	0006	Edward von Siebold Dingle collection, 1816-1975
C	C59 (box 1-2)	0007	Pierrine Smith Byrd Papers, 1919-1991
A	A67	0008	James Warley Miles Papers, 1852-1970
A	A67	0009	Charles Henry Meltzer papers, 1839-1940
A	AA3 (box 1-3)	0010	Jane McDonald Craver Scrapbooks, 1940-1944
C	Flat File A15 (oversize paper folder)	0011	Architctural Drawings, Simons & Lapham, 1919-1952
C	C59 (box 1-2), AA3 (box 3)	0012	Harry Wyman Freeman Papers, 1962-1998
C	C59-C60 (box 1-6), Flat File A15	0013	Alston Deas collection, 1861-1976
A	A67-A68 (box 1-2)	0014	Research on Education in Charleston, S.C., 1930
C	C60	0015	Ford-Fraser Family Papers, 1839-1926
C	C60-C62, C64 (box 1-15), AA3 (box 16)	0016	Footlight Players Collection, 1885-1975
A	AA65 (box 1), BB143 (microfilm)	0017	Charles Fraser Book of Precedents, 1800-1807

Figure 2: The spreadsheet created by Special Collections staff to track the shelf and vault locations of manuscript holdings.

At the College of Charleston, preparations also included physically (and occasionally intellectually) reuniting manuscript collections that had been heretofore stored separately. Another added benefit of these efforts was the creation of a more standardized accessioning procedure at the College of Charleston, an important accomplishment in the face of a more complicated accessioning landscape once the South Carolina Historical Society's holdings were on-site.

Prior to the renovation, archival collections and rare books held by Special Collections were housed in the aforementioned "north" and "south" vaults. Post-renovation, manuscript collections would be located in either one of two locations. An "A" space, the renovated temperature and humidity controlled "north" vault which would hold rare and fragile nineteenth and twentieth century materials; and a "C" space, the supplementary mobile shelving located outside of Special Collections which would be used for new acquisitions and more stable materials.

To track the storage location of individual manuscript collections, a simple spreadsheet was created listing all collections in call number order. The head of Special Collections determined which materials would stay in the "A" space and which would be stored in the "C" space. Considerations regarding research use, condition, and value were taken into account when choosing the storage location of collections and books.

Since Special Collections materials were no longer stored in vaults within the department and were also sharing space with similar types of materials that were separately owned by the South Carolina Historical Society, a system of electronic location codes for catalog records was also devised to track the shelving locations for both manuscripts and rare books. New location codes were representative of the resource type as well as the general vicinity in which objects were stored. Special Collections created location codes for manuscripts in both “A” space and “C” space. The South Carolina Historical Society created location codes for rare books brought to the College of Charleston, as well as rare books that were kept at the Fireproof Building. These codes were added to the appropriate item level field in each MARC record. Location codes are very useful to reference staff when pulling materials for researchers and help minimize errors when materials are being re-shelved after consultation.

One of the most unexpected aspects of the preparatory workflow accomplished by the South Carolina Historical Society was the significant energy reclassification of published materials demanded. It is well recognized that the South Carolina Historical Society’s manuscript holdings are the most valuable asset of the organization. Published materials are collected, for the most part, to provide context to and support for manuscript content. While other information objects were to be housed in separate vaults in the new College of Charleston space, the reference books of both institutions needed to be interfiled in the reading room for seamless patron browsing. This large-scale reclassification project required conversion of over 2,000 South Carolina Historical Society reference books from the Dewey Decimal system (DDC) to the Library of Congress Classification (LCC) scheme and took nearly 10 months to complete. A second layer of this reclassification workflow involved merging catalog records of an additional 2,500 books with duplicate records representing books already held by the College of Charleston.

In order to accomplish the ambitious reclassification, librarians used Millennium ILS cataloging software to create a series of lists which identified all South Carolina Historical Society reference books that did not share a catalog record with books

already held by the College of Charleston. The final list was exported to a spreadsheet and used to track work throughout the project.

Key	Initial	CALL #(BIBLIO)	CALL #(ITEM)	LOCATION	TITLE	AUTHOR
Unique	mi	DP41 .P49 2010	.920 .P48 2010	sch	Notes on Spain and the Spaniards, in the summer of 1563	Pettigrew, James Johnston, 1811-1881
Not Unique	b	ND1839.R655 S54 2010	759.13 S54 O54 2010	sch	The Old plantation : the artist revealed / by Susan Shames	Shames, Susan P., 1953-
Unique, remain at SCHS	mi	CS71.B28 2009	.929 Barnes 2009	sch	Those who came before : a family history of Malcom Barnes	Barnes, Roger Elkins, 1939-
Anomalies in need of fix	mi	929 Jenkins 2010	929 Jenkins 2010	sch	The descendants of John Jenkins I of the South Carolina Lowcountry	Rivers, Joseph LaRoche, 1931-
	b	CS71.T983 2008	.929 Tyler 2008	sch	William and Ann Carter Tyler and some of their descendants	Brodie, Al, 1933-
	b	016 .R69 1996	016 .R69 1996	sch	Georgia almanac / by Arthur Ray Rowland	Rowland, Arthur Ray, 1930-
	b	016.9757 .B5 2000	016.9757 .B5 2000	sch	Bibliography of South Carolina, 1563-1950 / by Robert J. Turnbull	
	b	016.05 .M6 1967	016.05 .M6 1967	sch	Research materials in South Carolina : a guide / by John Moore	Moore, John Hammond, 1914-
	b	015.757 .G68 1995	015.757 .G68 1995	sch	A descriptive bibliography / Christopher Gould	Gould, Christopher, 1947-
MIA	b	015.757 .M67 1966	015.757 .M67 1966	sch	A preliminary bibliography of South Carolina in the 18th century	Morgan, Richard Parker, 1914-
	b	021.025 .S64 1978	021.025 .S64 1978	sch	Special collections in libraries of the Southeast	edited by J. B. Howell with a foreword by J. B. Howell
	b	016.912 .A33 1928	016.912 .A33 1928	sch	British headquarters maps and sketches used by the British in the South Carolina Lowcountry	Adams, Randolph Greenfield, 1811-1881
	b	016.709 .S65 1967	016.709 .S65 1967	sch	A biographical index of American artists / by Ralph Smith	Smith, Ralph Clifton, 1898-
MIA	b	016.37 .I53 1996	016.37 .I53 1996	sch	Index to American photographic collections : compiled at the International Museum of Photography in the 20th Century	Moore, John Hammond, 1914-
	b	015.757 .M66 S68 1988	015.757 .M66 S68 1988	sch	South Carolina newspapers / compiled and edited by Moore	Moore, John Hammond, 1914-
	b	014.9 .M55 G85 1995	014.9 .M55 G85 1995	sch	Guide to research collections of former members of the United States House of Representatives	Paul, Karen Dawley, 1939-
	b	016.9757 .E27 1950	016.9757 .E27 1950	sch	Guide to the study and reading of South Carolina manuscripts	Easterby, J. H. (James Harold), 1914-
	b	015.757 .M36 N49 1998	015.757 .M36 N49 1998	sch	The palmetto press : the history of South Carolina printing	McNeely, Patricia G., 1939-
	b	014.9 .B66 L36 1991	014.9 .B66 L36 1991	sch	Languages of the aboriginal southeast : an annotated bibliography	Booker, Karen M., 1944-
	b	015 .R44 C67 1970	015 .R44 C67 1970	sch	The Cornwallis papers : abstracts of Americana	Reese, George Hankle, 1914-
	b	014.9 .A53 G85 1983	014.9 .A53 G85 1983	sch	A guide to Cherokee documents in foreign and domestic archives	Anderson, William L., 1941-
	b	014.9 .K84 A44 1982	014.9 .K84 A44 1982	sch	American Indian archival material : a guide to the collections in the Library of Congress	Chappasak, Rom, 1944-
	b	014.9 .K84 D57 1965	014.9 .K84 D57 1965	sch	Dissertations in history, an index to dissertations in the Library of Congress	Kuehl, Warren F., 1924-
	b	014.9 .K84 D57 1972	014.9 .K84 D57 1972	sch	Dissertations in history, an index to dissertations in the Library of Congress	Kuehl, Warren F., 1924-
	b	014.9 .M38 A44 1974	014.9 .M38 A44 1974	sch	American diaries in manuscript, 1580-1954 : a guide to the collections in the Library of Congress	Matthews, William, 1905-1975
	b	014.9 .M55 G85 1988	014.9 .M55 G85 1988	sch	A Guide to research collections of former members of the United States House of Representatives	
	b	014.9 .S45 M36 1975	014.9 .S45 M36 1975	sch	Manuscript sources in the Library of Congress	Library of Congress

Figure 3: The tracking spreadsheet used during the reclassification of South Carolina Historical Society reference books. Titles displayed in red were those that were reclassified with Library of Congress classification numbers and interfiled with Special Collections reference books in the new shared reading room.

To begin, each of the 4,500 titles in the tracking spreadsheet was pulled, its record searched in the online catalog, and the item was physically examined to determine if it was actually a unique title or a duplicate. Next, each title was categorized and color-coded to denote whether it was unique, duplicate, or unique but not worth taking to the College of Charleston. A detailed workflow was subsequently written to direct the trajectory of each of book based on its color-coded categorization.

Once de-duped and examined, books not held by the College of Charleston and slated for relocation to the new reading room were assigned a LCC call number. By the end of the project, over 2,000 books were reclassified and ready for relocation. About 2,500 duplicate records were merged. Also, throughout the project, holdings for the South Carolina Historical Society books were updated in OCLC.

Shortly before the South Carolina Historical Society was closed to the public, staff began physically separating the reclassified books lining the walls of the reading room from the volumes that were to remain at the Fireproof Building. When the movers arrived,



the books going to the College of Charleston were already in LCC order. Staff used painter's tape to block shelves in the reading room as an extra visual indicator of materials that were not to be moved.

### **Relocating the South Carolina Historical Society's Archives**

The benefits of working with a professional moving company cannot be overstated. The South Carolina Historical Society circulated a request for proposals from moving companies in the summer of 2013 and received six proposals with budgets ranging from approximately \$25,000 to just over \$100,000. Each proposal was evaluated based on the following criteria:

- *Overall proposal suitability*: The scope and needs included in the request for proposal (RFP) were addressed satisfactorily and were presented in a clear and organized manner.
- *Organizational experience*: Proposals specifically described past experiences as they pertained to the scope of the South Carolina Historical Society's project.
- *Previous work*: Examples of experience pertaining to relocation of cultural heritage collections/libraries/archives and references from previous engagements.
- *Value and cost*: The expense of solution(s) outlined in each proposal based on the work to be performed in accordance with the scope of the relocation project.
- *Staff technical expertise and experience*: Resumes or documentation detailing the technical expertise and experience of project staff.

After interviewing top candidates, we signed a contract and scheduled a preliminary site visit with project management staff in January 2014, nearly a year in advance of our targeted move date. During the initial site visit we gave an overview of the project; an in-depth tour of the Fireproof Building involving discussion of collection layouts and orders; the processes of the move; and staff concerns. We also spent time making lists of preparation priorities and materials such as boxes, tape, foam core, and other collections care necessities. The visit ended with a tour of the Addlestone library. Since many of the improvements and changes to the building were not scheduled to begin for another five months, we devoted

much of our time to examining the infrastructure of the building—elevators, loading docks, etc.—to determine initial in-flow of collections during the move.

With the assistance of an experienced project manager, the collections and staff at both the South Carolina Historical Society and the College of Charleston were well prepared as moving week approached. We set aside three days in mid-December to accomplish the relocation. Partners chose this interval for several reasons. First, the semester was over and students and library patrons would not be disturbed by the hustle and bustle of movers escorting the South Carolina Historical Society's holdings to the third floor of the building. Second, environmental data from vaults in the Fireproof Building collected over the course of three previous years indicated that December was the ideal time to make the transition. Charleston's ambient temperature and humidity levels are not only mild in December, but also conditions in the South Carolina Historical Society vaults had relatively stabilized by mid-winter. Our goal was to minimize the environmental shock to the manuscript materials as they were transferred from semi-primitive conditions in the Fireproof Building to a sophisticated temperature and humidity controlled vault at the College of Charleston. Third, security breaches in December were less likely due to the low volume of tourism and student traffic in the congested downtown area. While professional movers did all of the heavy lifting, South Carolina Historical Society staff monitored security at key locations along the move route to ensure the safety and highest levels of care for the materials. Public Safety officers at the College of Charleston were assigned to facilitate security on campus.

<b>Spotter Assignments for SCHS Move - December 15, 16, and 17</b>					
<b>SC HISTORICAL SOCIETY: Faye (leader), Valarie, Karen, Ginny, Matt, Lauren</b>					
<b>COLLEGE of CHARLESTON: Mary Jo (leader), Deb, Parker, Celeste, Eric, Virginia, Molly</b>					
	Shift 1*	Shift 2*	<b>LUNCH</b>	Shift 3*	Shift 4*
<b>SC HISTORICAL SOCIETY</b>					
Station 1: North portico	Karen	Lauren		Matt	Ginny
Station 2: Curbside/entrance float	Ginny	Karen		Lauren	Matt
Station 3: Packing team A	Matt	Ginny		Karen	Lauren
Station 4: Packing team B	Lauren	Matt		Ginny	Karen
Oversight/Float	Faye	Faye		Faye	Faye
<b>COLLEGE of CHARLESTON</b>					
Station 1: Dockside	Parker	Virginia		Eric	Celeste
Station 2: Receiving Door - 1st floor	Celeste	Parker	Virginia	Eric	
Station 3: Rotunda - 3rd floor	Eric	Celeste	Parker	Virginia	
Station 4: Special Collections	Virginia	Eric	Celeste	Parker	
Oversight/Float	Mary Jo	Mary Jo	Mary Jo	Mary Jo	

**\*Shifts will last approximately 2-2.5 hours**

Figure 4: Strategic staff location assignments to ensure smooth and safe transition of South Carolina Historical Society holdings during the multi-day relocation.

The movers employed large cardboard boxes on wheels, called missiles, to relocate the materials. Staff numbered the shelves in the new vaults and reading room to match corresponding cardboard boxes of books and manuscript material being shepherded from the Fireproof Building to their new home. This allowed movers and staff to push the boxes right up to the appropriate ranges where the materials were to be stored in the Addlestone Library, leaving little room for error or loss of information objects. Although we had reserved three days to accomplish the move, all collections slated for relocation to the Addlestone Library had been removed from the Fireproof Building by the end of the second day.

**Coordinating Communication and Publicity**

Accurately anticipating how changes would affect archives users was essential. Many longtime South Carolina Historical Society patrons were ambivalent about the loss of the nostalgic nineteenth century reading room in the Fireproof Building. Administrators at the College of Charleston were concerned about how the increased archival footprint in the Addlestone Library would

affect student experiences. Efforts to make the partnership and relocation processes transparent included a renovation-themed website hosted by the College of Charleston, significant inreach across Addlestone library departments and outreach across the South Carolina Historical Society membership base, and updates published in newsletters, listservs, blogs, and newspapers.

Since the improvement project would affect every department in the Addlestone library in some way, an ad hoc committee composed of departmental faculty and staff from circulation, reference, technical services, cataloging, and special collections was formed and tasked with populating and maintaining a website to keep students, staff, faculty, and patrons informed of renovations and changes. The committee surveyed websites of several other institutions that had been through similar renovations and compiled the appropriate information to convey on the Addlestone Library Improvement Project website. Contained in a simple WordPress site, the publicity and awareness tool was consistently updated with information on the project including a timeline, an FAQ section, information for faculty, details regarding access to Special Collections, and floorplans of the renovations.<sup>9</sup>

In February 2015, an orientation to the South Carolina Historical Society's services, collections, and personnel headlined the Addlestone library-wide staff meeting. This was an essential opportunity to demonstrate respect and appreciation for colleagues outside of the archives and special collections who were not only dealing with facility renovations but would also be assisting with new South Carolina Historical Society patron requests for basic information or directions.

In order to enhance public knowledge of the partnership and inform constituents of changes, both institutions agreed upon a shared press release and talking points. We worked together to plan a large event unveiling the new partnership and curated a large-scale exhibit showcasing the complementary nature of each repository's holdings as well as the research strengths the partnership exercised in the fields of southern and Atlantic world scholarship. Promotion and celebration of the versatile new space reminded patrons that the

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<sup>9</sup> For additional details on the workflows, schedules, and renovation of the space in the summer of 2014, see the Addlestone Library Improvement Project blog at <http://blogs.cofc.edu/addlestone-improvement/>.

change was in the best interest of the archives and the missions of each organization.

### **Addressing Challenges**

Although there were few major complications, the process was not without problems or obstacles. At the macro level, partners eventually came to recognize the importance of minimizing the competition for resources. Since both institutions rely on the patronage of many of the same individuals and granting agencies, the goal was, and continues to be, to cultivate the partnership as a whole in order to reap the largest benefits of the collaboration. Assuming that there are a finite number of resources for which each institution must compete is detrimental to the alliance. In order for the partnership to thrive, it is essential to consistently nurture the spirit of the open and freely shared intellectual and physical space envisioned when the partnering entities embarked upon this endeavor.

At the micro level, staff experienced challenges having to do with construction delays, security modifications, concurrent project commitments, and constraints in communication. As a result of minor delays in renovations to the Addlestone Library that took place during the summer of 2014, Special Collections opened one week late for the Fall semester. This was a minor setback considering that two of the library's three floors were closed to the public for the entire duration of the summer. This aggressive closing schedule was implemented so materials could be securely shifted and stored away from the construction zones while minimizing disturbances to students and patrons.

Ambitious renovation schedules aside, the most significant complication experienced in the space was realized after the South Carolina Historical Society's holdings were moved. First, incorrect weight specifications for the newly installed mobile shelving carriages in both vaults caused the carriages to bend and scrape along the vault floors. Because of this, several sections of mobile shelving in both vaults, including cumbersome flat files, were disassembled so the floors could be ground down to accommodate bending of the carriages and subsequent deflection on the floors. In addition, several rear carriage sections were replaced and the bottoms of the corrected carriages were reinforced with a 5/8-inch-thick steel plate to minimize any additional weight-related bending and warping. The

repairs were done in two phases. The first phase consisted of preparatory work to install a barrier to shield holdings from dust and debris. The second phase entailed disassembling the shelving, grinding the floor, and re-assembling and reinstalling the modified mobile shelving.

To our dismay, shelving problems also became apparent in the reading room. Again, incorrect weight specifications applied during installation led to the potential for collapses. Shoring up of the shelves in the reading room, together with loud floor grinding in the vaults, would pose a significant hindrance to reference services and operations for both institutions. As a result, Special Collections and the South Carolina Historical Society closed for the repairs during the last week of July 2015. This could have been avoided if we had proactively invited more detailed conversations with subcontractors and shelving specialists instead of assuming that they had all of the correct specifications to make accurate structural engineering decisions.

Unanticipated security threats also manifested when we discovered that the key entry hardware used for new external mobile shelving units in “C” space was identical to the hardware used on *all* installations of these particular mobile shelving units. This meant that any institution that had this locked shelving also had keys that could open the new units installed in the Addlestone library. As a result, the library was obliged to install custom-coded keypads and to create unique keypad codes for staff and supervisors.

During the renovation and relocation process, Special Collections was in the midst of accomplishing work for three grant-funded projects. In order to meet all grant deadlines unimpeded, a separate processing room was created in advance of the reconfiguration to accommodate grant staff and archival processing. Unfortunately, lack of manuscript shelving in the new processing space necessitated constant shuttling of manuscript materials between the processing room and vaults. Despite these obstacles, all three projects were completed on or ahead of schedule.

The South Carolina Historical Society also struggled with bridging distances between staff, collection storage, and ongoing responsibilities after relocation. With archival operations based at the Addlestone Library and administrative operations headquartered 15 blocks south in the Fireproof Building, the South Carolina Historical

Society's bifurcated staff became flexible by necessity. Ordinary office functions, such as sending and receiving mail by post, now take extra time. Stewardship and access to unprocessed and duplicate holdings still housed at the Fireproof Building requires making lists of items needed from the Fireproof Building ahead of visits and ensuring patrons have communicated their visit plans with staff well in advance. However, all of these adjustments are well worth the increased security of and access to the South Carolina Historical Society collections and the future possibilities of the Fireproof Building as an interpretive historic site open to the public.

### **Conclusion**

Through shared space and service, the College of Charleston's Special Collections and the South Carolina Historical Society gain exposure to larger quantities of users. Family historians who visit the South Carolina Historical Society to access the renowned genealogical records often find resources in the holdings of Special Collections beneficial to their quest; students who visit Special Collections in search of a requisite primary source for academic coursework are gratified when they lay their eyes on correspondence from the early 18th century or the records of a lowcountry plantation in the holdings of the South Carolina Historical Society. Administrators and archivists at each repository recognize this enhanced user impact as a very necessary means of increasing the likelihood that both repositories will thrive.

The decision to relocate the South Carolina Historical Society's archives program to the College of Charleston demonstrated visionary leadership. Seizing opportunities embedded in the inevitable location change, archivists and administrators at the South Carolina Historical Society and the College of Charleston chose to also strengthen the infrastructures of the respective partner repositories. Personnel, equipment, staff expertise, and preservation resources are not only consolidated, but magnified. While the collaborative alliance created significant changes in workflows and tested the fabric of each organization's structure and day-to-day activities, the two organizations and their constituents took

advantage of the possibilities offered by a simple brick and mortar space-sharing partnership, creating a new research center that offers 21st century students and scholars opportunities for serious learning and discovery.

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**Molly Inabinett** is the Librarian for the South Carolina Historical Society, where she began working in 2014. She received a B.A. in historic preservation and community planning from the College of Charleston in 2008 and received her MLIS in the fall of 2015 from the University of South Carolina. During her graduate studies, she completed internships with the Catholic Diocese of Charleston Archives and the Charleston Library Society. In 2015, she served as Secretary/Treasurer for the Charleston Council on Archives, Libraries, and Museums, and she served as Vice-President of the organization in 2016. Molly currently serves on the board of the South Carolina Archival Association as Secretary.