

California Preservation Program - Part 4 - Planning and Prioritizing: Tools for Success

12/19/2013

The California Preservation Program
Presents

Laura Hertz Stanton

PRESERVATION BEST PRACTICES

SESSION 4:
PLANNING AND PRIORITIZING:
TOOLS FOR SUCCESS

Thursday, December 19, 2013

Today


- Policies
- Planning



Policies and Intellectual Control

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Poll



Policies and Intellectual Control: Getting Started

The board and staff and the institution understand the purpose and importance of the collections management policies and are committed to having the necessary documents in place



Policies and Intellectual Control: Getting Started

- Policies
 - Mission Statement
 - Collections Management Policy
 - Collections Development Policy
 - Collections Procedures Manual
 - Preservation Plan
 - Emergency Preparedness and Response Plan
 - Security Policy
 - Loan Policy
 - Exhibition Policy Handling Policy
 - Use Policy
 - Rights and Reproduction Policy
 - Housekeeping Policy and Procedures

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12/19/2013

**Policies and Intellectual Control:
Getting Started**

A mission statement is in place that is a true reflection of the institutional direction



http://www.ny.edu/flickr/preservation/media/images/2005_02_dc/summary_smithsonian.html

**Policies and Intellectual Control:
Getting Started**

- The institutional strategic plan includes goals and objectives that relate to preservation
- A Collections Development policy is in place
- A basic inventory of the collections has been completed



http://www.ny.edu/flickr/preservation/media/images/2005_02_dc/summary_smithsonian.html

Policies and Intellectual Control: Good

A collections management policy is in place



Barta IV, www.flickr.com

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12/19/2013

Policies and Intellectual Control: Good

- Collections Management Policy
 - a document that establishes policy regarding:
 - accessioning
 - deaccessioning
 - collections authority
 - collections access
 - staffing
 - materials placed in institutional custody
 - the level of necessary care
 - record keeping and documentation
 - insurance coverage

Resource

Things Great and Small
by John Simmons

American Association of
Museums, 2006



Policies and Intellectual Control: Good



- A loan policy is in place
- Access policy are in place for staff and outside researchers
- A procedures manual is in place for the collections
- A rights and reproductions policy in in place for researchers

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12/19/2013

Policies and Intellectual Control:
Better


- Policies are understood and approved by the board and/or collections committee
- Policies and guiding documents are reviewed and updated on an annual basis
- An institutional records management program is in place



OSU Main Library Stacks, yobgorf, www.flickr.com

Policies and Intellectual Control:
Better

- The entire collection is cataloged to established standards
- A system is established for the regular inventory of collections



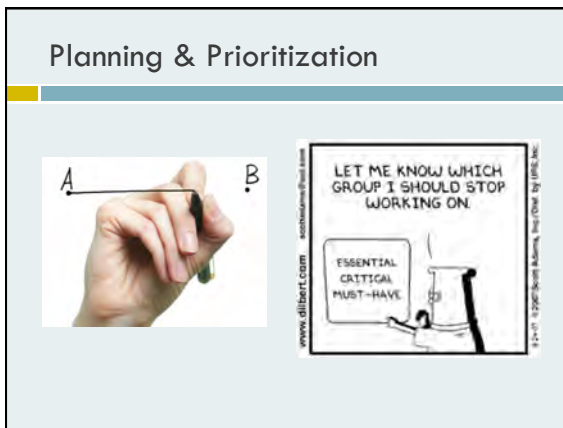
Planning & Prioritizing

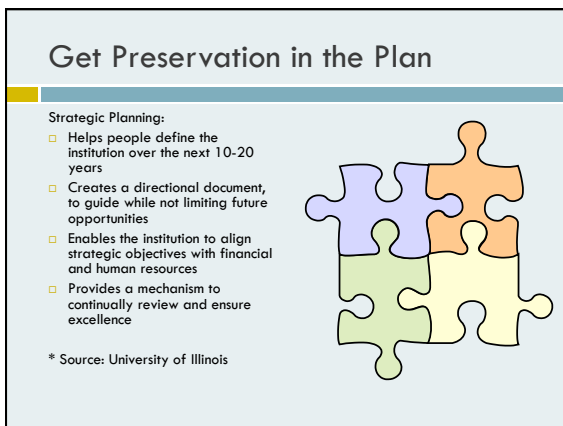
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12/19/2013



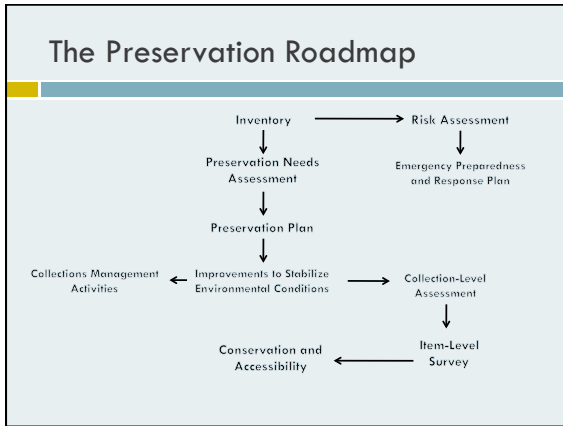


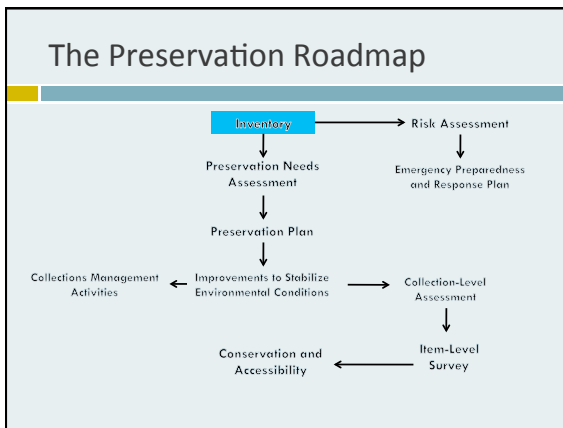


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12/19/2013





Inventory

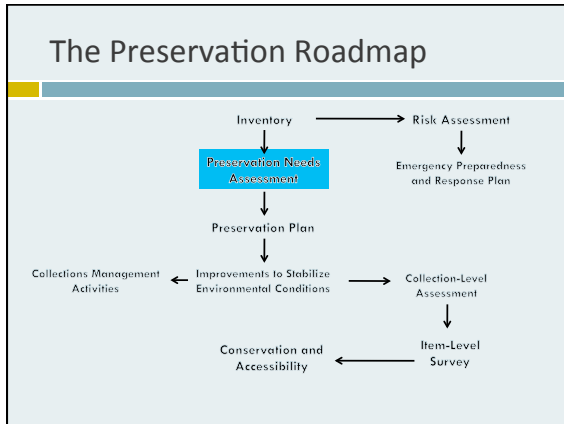
- Know what you have
- Quantify
- Basics of condition
- Location

<http://unrated.wordpress.com/2010/08/31/smallobjects/>

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12/19/2013



Preservation Needs Assessment

An evaluation of:

- Policies
- Procedures
- Building
- Collections management
- Collections care

David Lee King, www.flickr.com

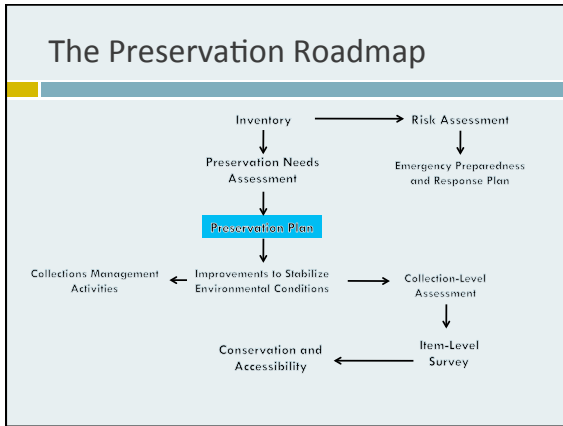
Preservation Needs Assessment

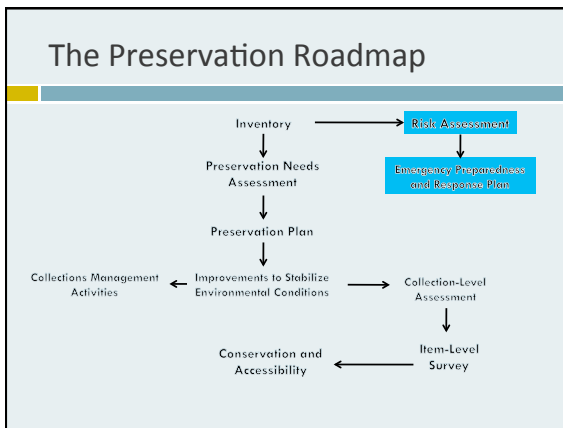
- IMLS Conservation Assessment Program 
- NEH Preservation Assistance Grants for Smaller Institutions 
- California Preservation Program 

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Emergency Planning

- Risk Assessment
- Emergency Planning

Resources for more info:

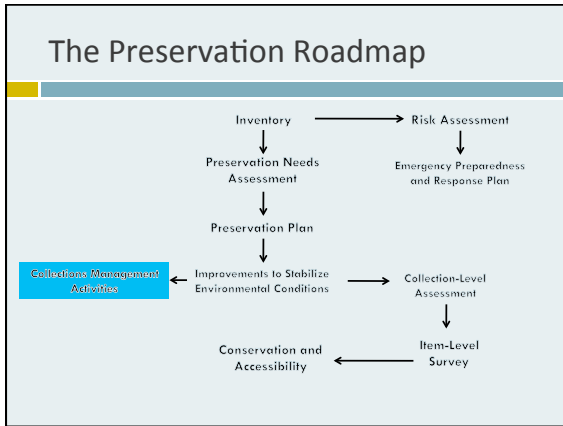
- California Preservation Program
- WESTPAS

<http://news.stanford.edu/news/2006/february1/planning-020106.html>

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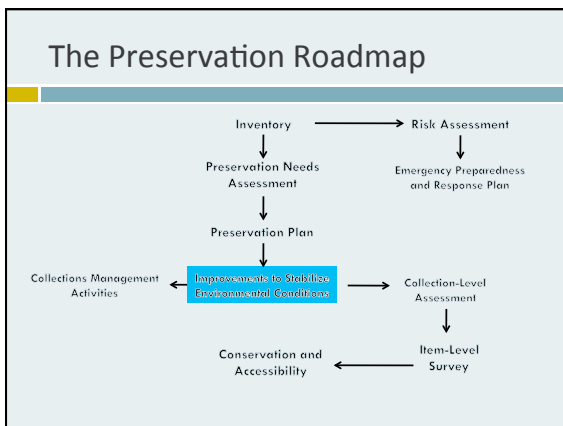
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Collections Management Activities

- Cataloging
- Photography
- Rehousing

Clockwise from Top: Dawn M. Armfield, Washington University Libraries, and Smithsonian Institutional Archives. All from www.flickr.com.




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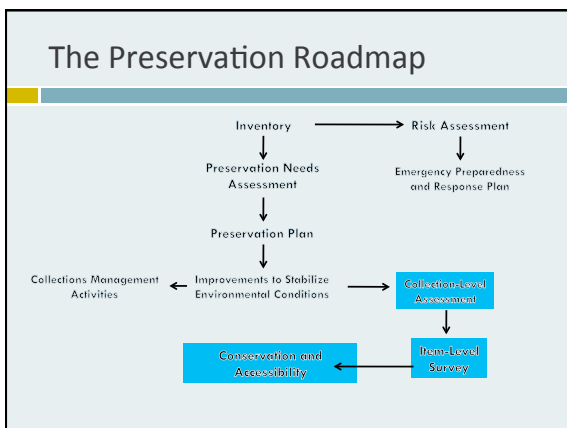
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12/19/2013

Environmental Conditions




- Climate control
- Environmental monitoring
- Lighting
- Security
- Fire Prevention
- Storage furniture



Conservation

- Appropriate conservator
- References
- Treatment proposal
- Documentation
- Safety
- Code of Ethics



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12/19/2013

Preservation Plan

- Outlines strategic goals **specifically** for preservation
- Aligns with institutional strategic plan
- Establishes timelines and benchmarks
- Holistic
- Systematic
- Creates cohesion
- Allows for continuity



Parts of a Preservation Plan

- Policies
- Facilities
- Environment
- Lighting
- Emergency Preparedness
- Security
- Housekeeping
- Pest Management
- Handling and Access
- Collections Storage
- Exhibition
- Preservation Planning
- Conservation
- Additional Considerations

Objective A: To maintain all buildings where collections are stored and exhibited in a manner that meets preservation standards.

B.A.1 Strategy: Review the cyclical maintenance plan and share the updated plan across departments.
Desired Outcome: Maintenance schedules are documented, necessary building repairs and inspections are done on a regular basis, and all museum staff is aware of their role in building maintenance.
Resources Needed: Staff time and financial resources for operational implementation of the schedule.

Staff Lead for Implementation	Impact	Feasibility	Feasibility/Impact Rating	Priority	Timeline for Completion
Director of Operations	5	3	15	Medium	Fall 2013

B.A.2 Strategy: Revise internal system of reporting and documenting maintenance requests.
Desired Outcome: Building maintenance needs are documented so that recurring issues and/or maintenance trends are recognized and can be addressed.
Resources Needed: Staff time for review of requests and analysis of maintenance trends.

Staff Lead for Implementation	Impact	Feasibility	Feasibility/Impact Rating	Priority	Timeline for Completion
Director of Operations	3	5	15	Medium	Fall 2013 and ongoing

B.A.3 Strategy: Obtain funding through the NHF Sustaining Cultural Heritage grant category to assess the necessary upgrades, repairs, and renovations for stabilization of the historic building.
Desired Outcome: The needs of the historic landmark building are known so that the structure can be further stabilized to limit moisture and water infiltration.
Resources Needed: Grant funding for building assessment, preservation architects.

Staff Lead for Implementation	Impact	Feasibility	Feasibility/Impact Rating	Priority	Timeline for Completion
Director of the Museum and Heritage Conservator	5	4	20	High	Fall 2013 - Fall 2014

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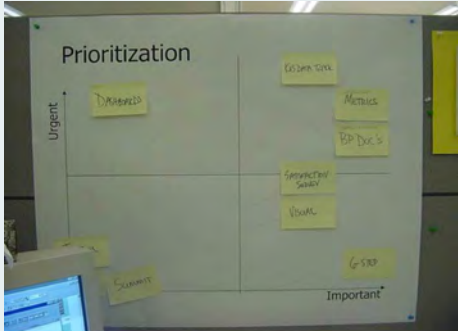
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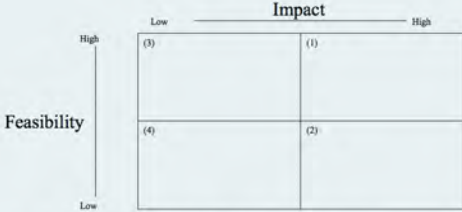
Develop a Funding Plan

- Match projects & \$\$\$
- Identify grants
- Plan necessary matching funds
- Court donors



Still Overwhelmed?





Impact

Low ————— High

(3) (1)

(4) (2)

Feasibility

High

Low

Impact: extent to which the recommendation will improve the library's preservation activities; includes activities that will result in dramatic improvement in the present condition of materials, substantial decrease in the rate of deterioration, substantial increase in efficiency of current preservation activities, or considerable savings of time, energy or money.

Feasibility: difficulty entailed in implementing the recommendation, particularly in terms of the time, energy and resources required to implement each recommendation.

Adapted from: Pamela W. Darling, *Preservation Planning Program: An Assisted Self-Study Manual for Libraries*, expanded 1987 ed. (Washington: ARL/CMS, 1987) SOLINET, 1999

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12/19/2013

Resources


- California Preservation Program
calpreservation.org
- Regional Alliance for Preservation
preservecollections.org
- Conservation Online
cool.conservation-us.org
- National Park Service Conserve O Grams
www.nps.gov/history/museum/publications
- Connecting to Collections Online Community
www.connectingtocollections.org
- Image Permanence Institute
www.imagepermanenceinstitute.org

Thank you and Questions

Questions about collections care?

Contact the California Preservation Program
info@calpreservation.org





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