The California Preservation Program
Presents

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PRESERVATION BEST PRACTICES

SESSION 4:
PLANNING AND PRIORITIZING:
TOOLS FOR SUCCESS

Thursday, December 19, 2013
Today

- Policies
- Planning
Policies and Intellectual Control
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**
Policies and Intellectual Control: Getting Started

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

[Link](http://www.nyu.edu/tisch/preservation/media/images/2005_02_dc/summary_smithsonian.shtml)
Policies and Intellectual Control: Good

A collections management policy is in place
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 place for researchers
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.
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
Poll
Planning & Prioritization
Get Preservation in the Plan

Strategic Planning:

- Helps people define the institution over the next 10-20 years
- Creates a directional document, to guide while not limiting future opportunities
- Enables the institution to align strategic objectives with financial and human resources
- Provides a mechanism to continually review and ensure excellence

* Source: University of Illinois
The Preservation Roadmap

1. Inventory
2. Preservation Needs Assessment
3. Preservation Plan
4. Collections Management Activities
5. Improvements to Stabilize Environmental Conditions
6. Conservation and Accessibility
7. Risk Assessment
8. Emergency Preparedness and Response Plan
9. Collection-Level Assessment
10. Item-Level Survey
The Preservation Roadmap

- **Inventory**
  - Preservation Needs Assessment
  - Preservation Plan
  - Improvements to Stabilize Environmental Conditions
    - Collections Management Activities
  - Conservation and Accessibility

- Risk Assessment
  - Emergency Preparedness and Response Plan
  - Collection-Level Assessment
    - Item-Level Survey
Inventory

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

http://uncrated.wordpress.com/2010/08/31/smallobjects/
The Preservation Roadmap

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- Conservation and Accessibility
- Item-Level Survey
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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The Preservation Roadmap

Collections Management Activities

Collections Management Activities

Improvements to Stabilize Environmental Conditions

Preservation Plan

Preservation Needs Assessment

Inventory

Risk Assessment

Emergency Preparedness and Response Plan

Collection-Level Assessment

Item-Level Survey

Conservation and Accessibility
Emergency Planning

- Risk Assessment
- Emergency Planning

Resources for more info:
- California Preservation Program
- WESTPAS

The Preservation Roadmap

Collections Management Activities

- Inventory
  - Preservation Needs Assessment
  - Preservation Plan
  - Improvements to Stabilize Environmental Conditions

- Risk Assessment
  - Emergency Preparedness and Response Plan

- Collection-Level Assessment
  - Item-Level Survey

Conservation and Accessibility
Collections Management Activities

- Cataloging
- Photography
- Rehousing

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

- Inventory
  - Preservation Needs Assessment
  - Preservation Plan
    - Improvements to Stabilize Environmental Conditions
- Collections Management Activities
- Risk Assessment
  - Emergency Preparedness and Response Plan
  - Collection-Level Assessment
    - Item-Level Survey
- Conservation and Accessibility
Environmental Conditions

- Climate control
- Environmental monitoring
- Lighting
- Security
- Fire Prevention
- Storage furniture
The Preservation Roadmap

Inventory → Risk Assessment

Preservation Needs Assessment → Emergency Preparedness and Response Plan

Preservation Plan

Collections Management Activities

Improvements to Stabilize Environmental Conditions → Collection-Level Assessment

Conservation and Accessibility → Item-Level Survey
Conservation

- Appropriate conservator
- References
- Treatment proposal
- Documentation
- Safety
- Code of Ethics
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 consistent implementation of the schedule

<table>
<thead>
<tr>
<th>Staff Lead for Implementation</th>
<th>Impact</th>
<th>Feasibility</th>
<th>Feasibility/Impact Rating</th>
<th>Priority</th>
<th>Timeline for Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director of Operations</td>
<td>5</td>
<td>3</td>
<td>15</td>
<td>Medium</td>
<td>Fall 2013</td>
</tr>
</tbody>
</table>

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

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<td>5</td>
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<td>Medium</td>
<td>Fall 2013 and Ongoing</td>
</tr>
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B.A.3 Strategy: Obtain funding through the NEH Sustaining Cultural Heritage grant category to assess the necessary upgrades, repairs, and renovations for stabilization of the Furness 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

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<td>Director of the Museum and Paintings Conservator</td>
<td>5</td>
<td>4</td>
<td>20</td>
<td>High</td>
<td>Fall 2013-Fall 2014</td>
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</table>
Develop a Funding Plan

- Match projects & $$$
- Identify grants
- Plan necessary matching funds
- Court donors
Still Overwhelmed?

Prioritization

Urgent

Important

- Dashboards
- KAS Data Track
- Metrics
- BP Doc's
- Satisfaction Survey
- Visual
- G-Step

Summit
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.


SOLINET, 1999
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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