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

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

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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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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

Policies and Intellectual Control: Good

A collections management policy is in place

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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

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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

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The Preservation Roadmap

- Risk Assessment
- Preservation Needs Assessment
- Preservation Plans
- Collection Management Activities
- Environment
- Conservation and Accessibility
- Inventory

Inventory

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

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The Preservation Roadmap

Preservation Needs Assessment

- An evaluation of:
  - Policies
  - Procedures
  - Building
  - Collections management
  - Collections care

Preservation Needs Assessment

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

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The Preservation Roadmap

- Risk Assessment
- Preservation Needs Assessment
- Preservation Planning and Prioritizing
- Conservation and Accessibility

California Preservation Program

Emergency Planning

- Risk Assessment
- Emergency Planning

Resources for more info:
- California Preservation Program
- WESTPAS

The Preservation Roadmap

Collections Management Activities

- Cataloging
- Photography
- Rehousing

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Environmental Conditions

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

The Preservation Roadmap

Conservation

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

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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

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Develop a Funding Plan

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

Still Overwhelmed?

Prioritization

Feasibility

Impact

High

Low

High

Low

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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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