

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



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



Barta IV, www.flickr.com

Policies and Intellectual Control: Good

□ Collections Management Policy

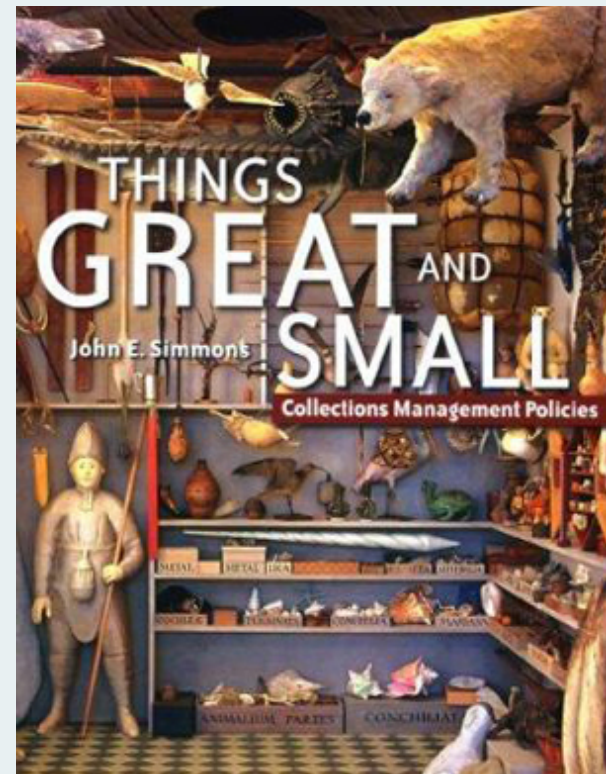
▣ a document that establishes policy regarding:

- 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



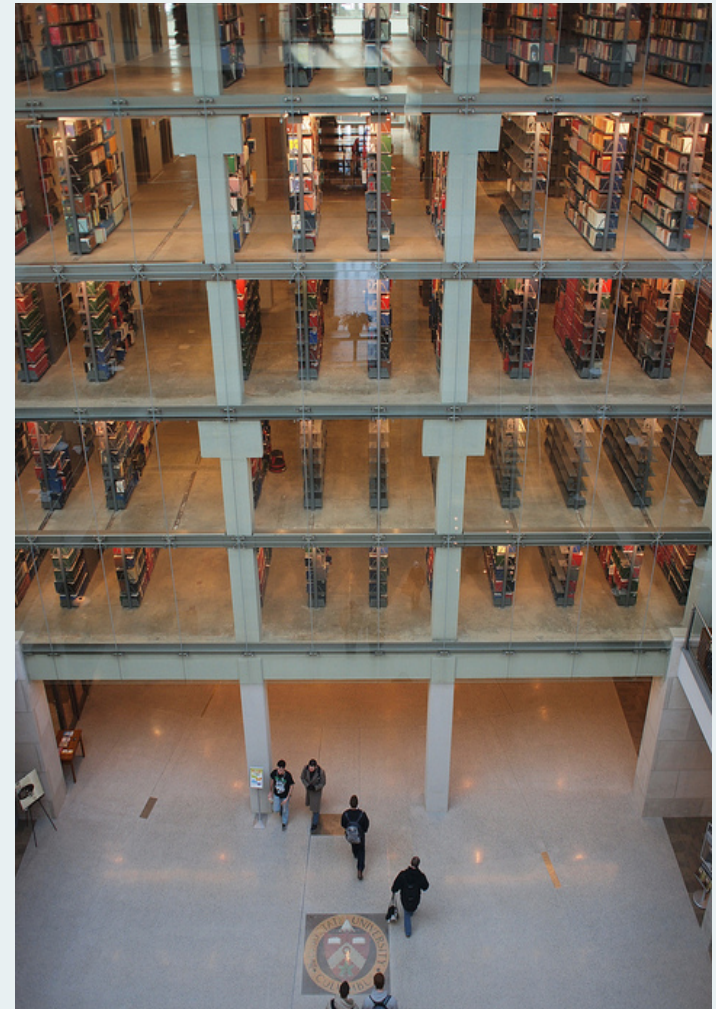
Policies and Intellectual Control: Good



- ▣ 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

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



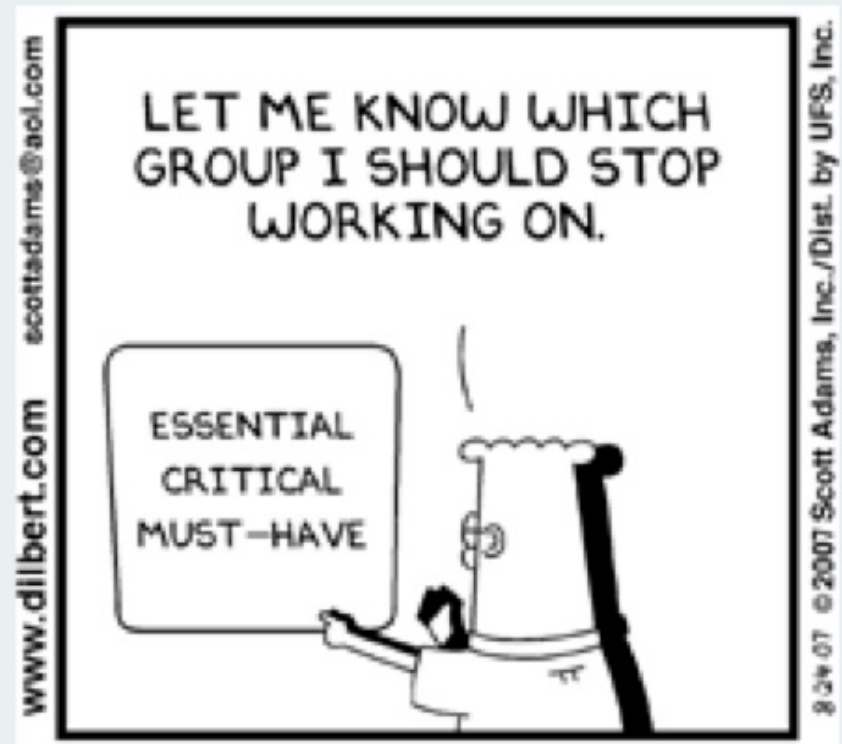


Planning & Prioritizing

Poll



Planning & Prioritization

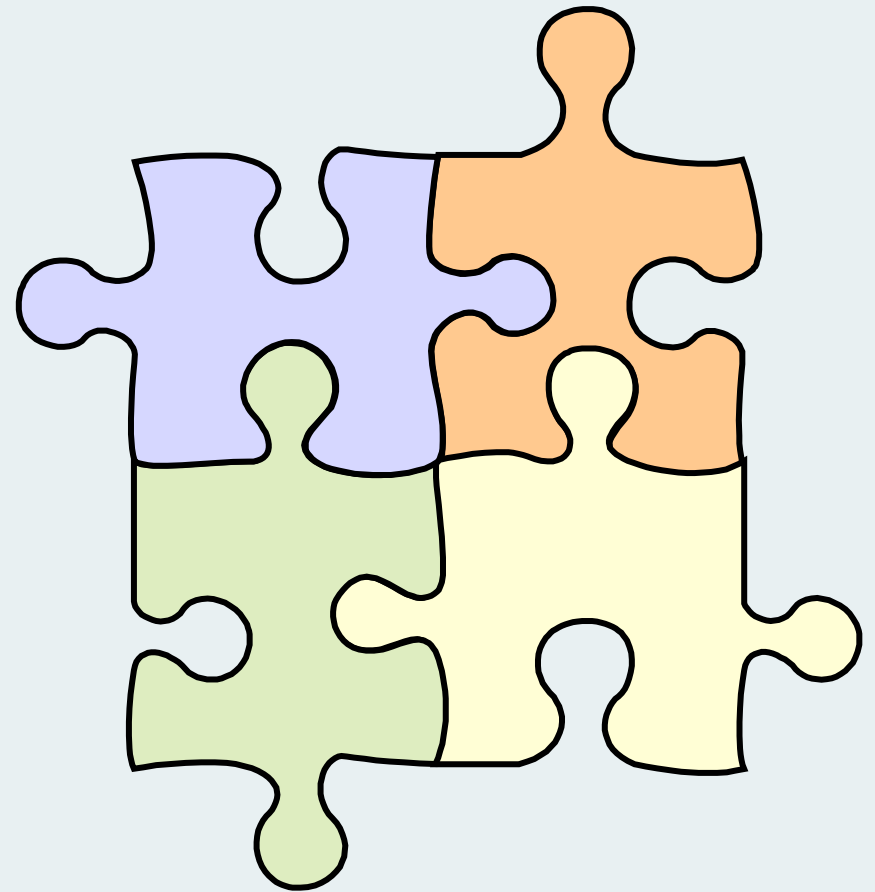


Get Preservation in the Plan

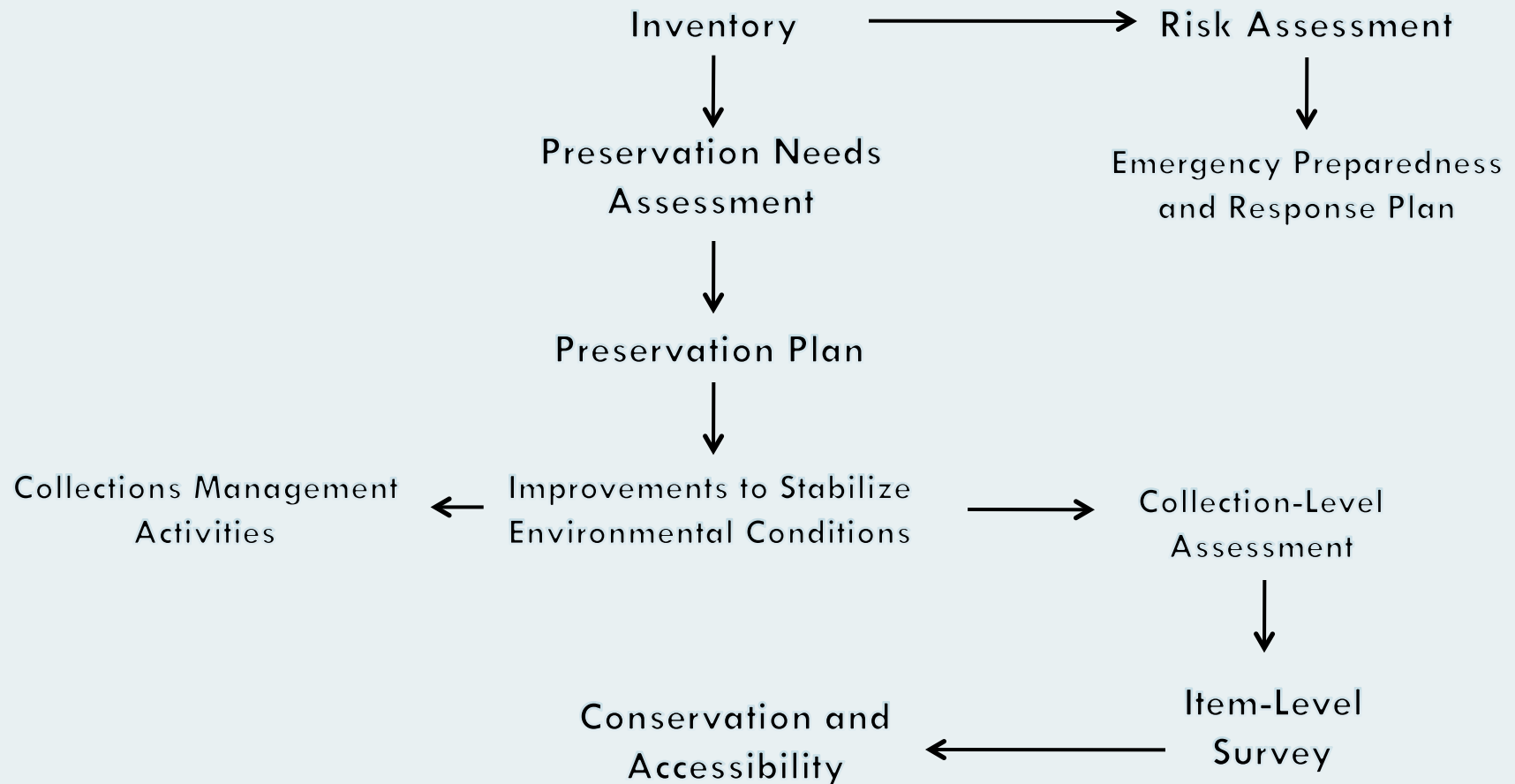
Strategic Planning:

- 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

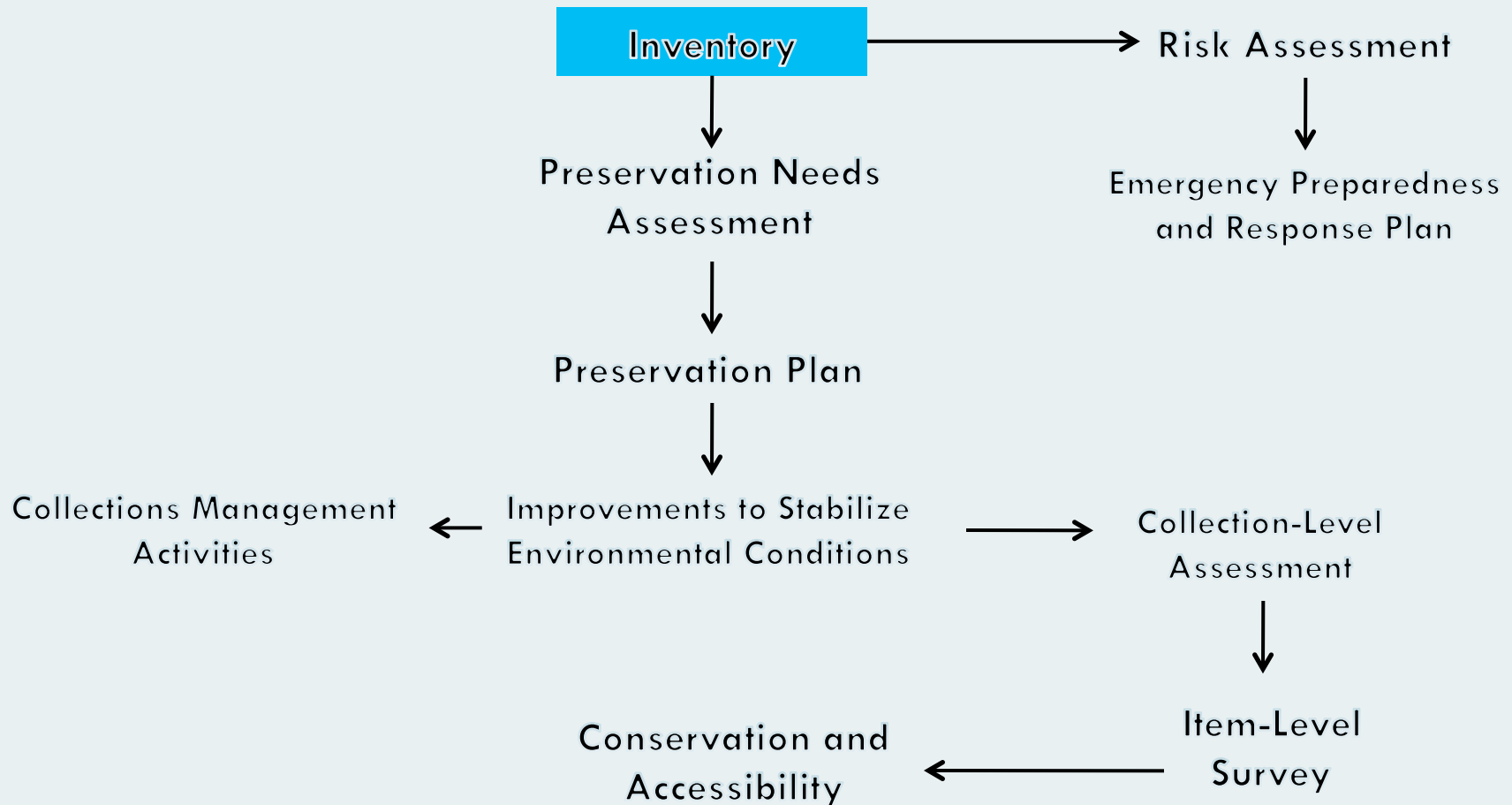
* Source: University of Illinois



The Preservation Roadmap



The Preservation Roadmap

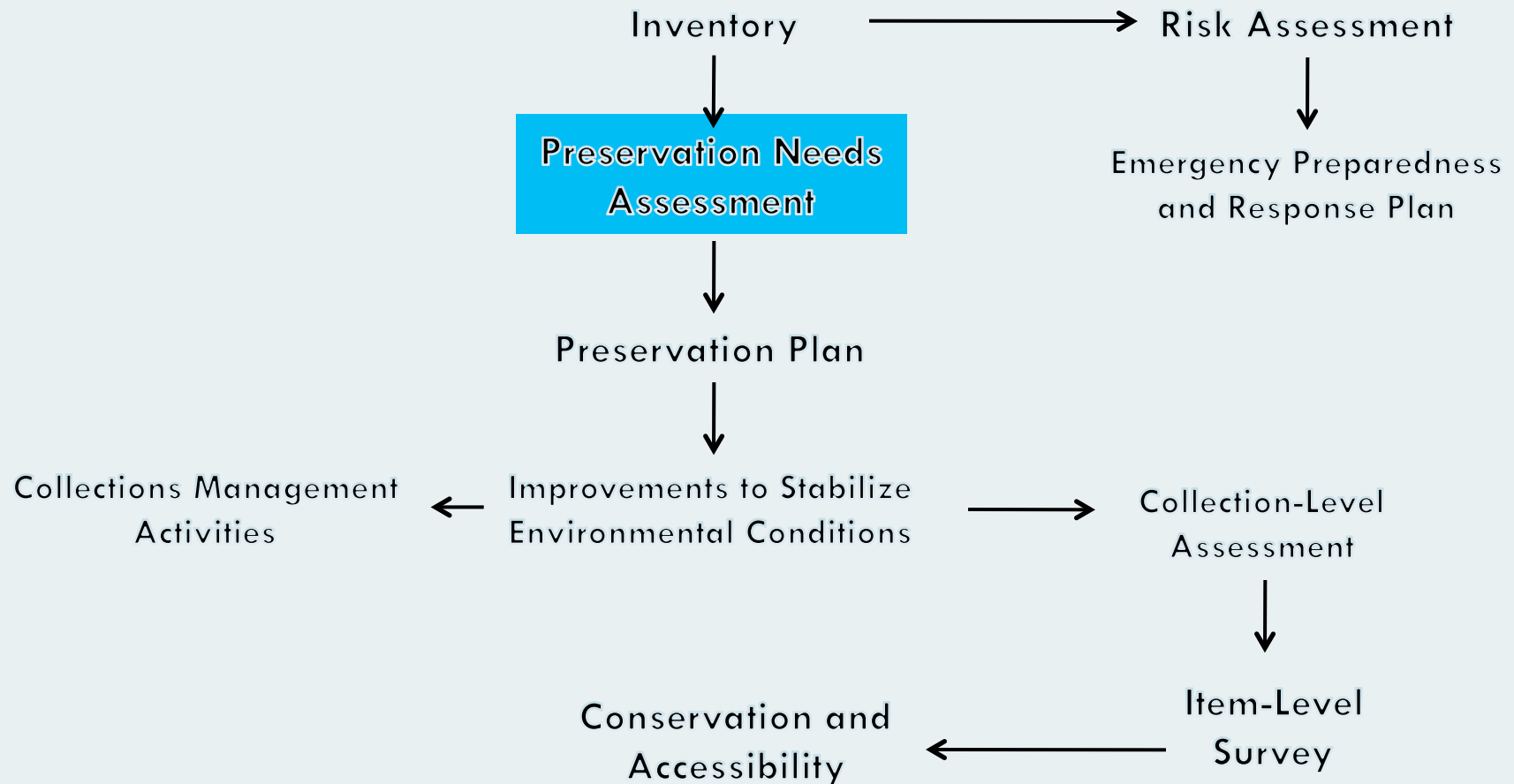


Inventory

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



The Preservation Roadmap



Preservation Needs Assessment

An evaluation of:

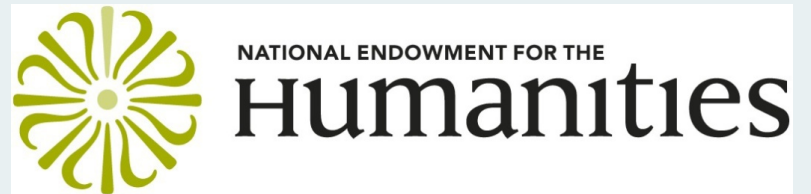
- Policies
- Procedures
- Building
- Collections management
- Collections care



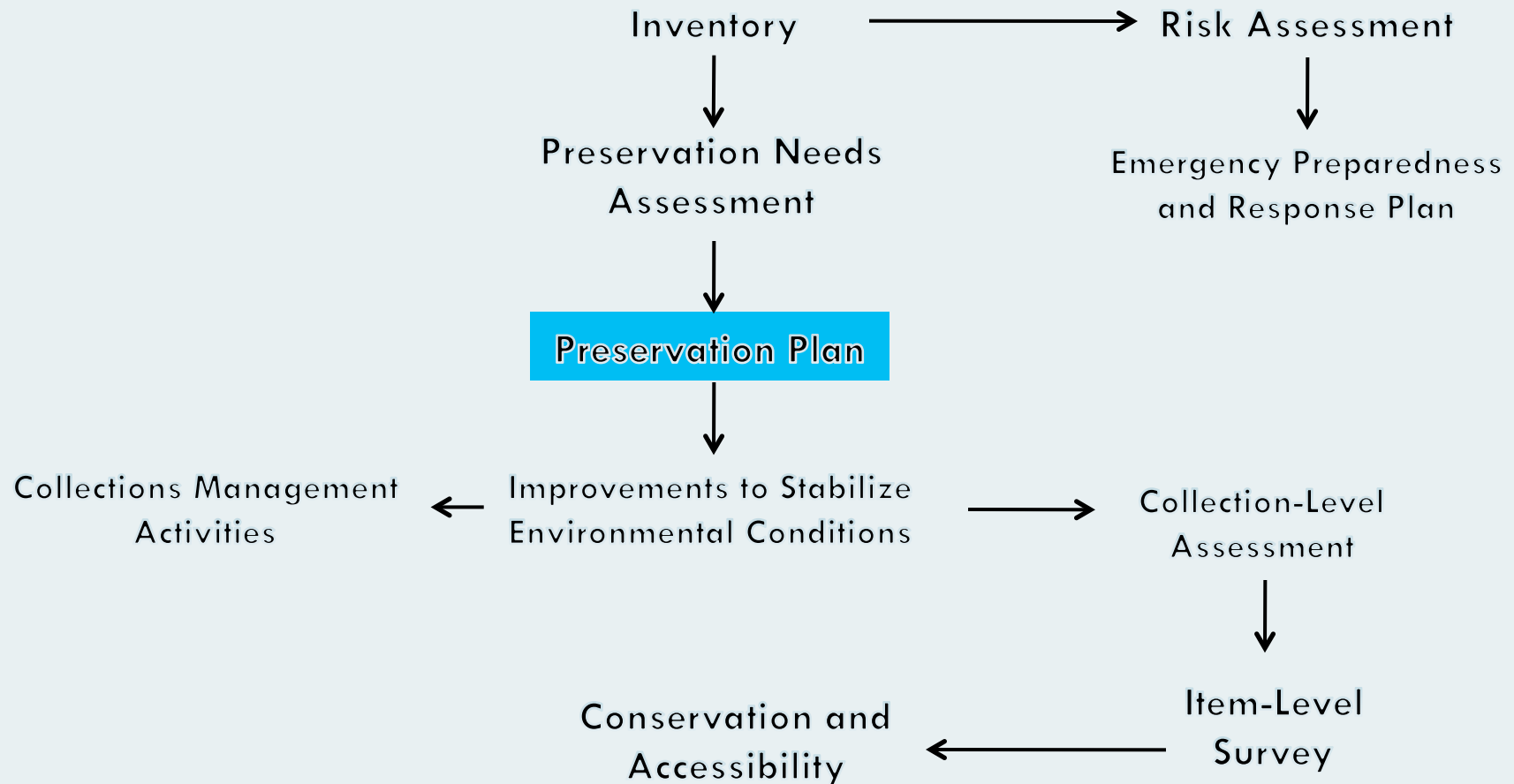
David Lee King, www.flickr.com

Preservation Needs Assessment

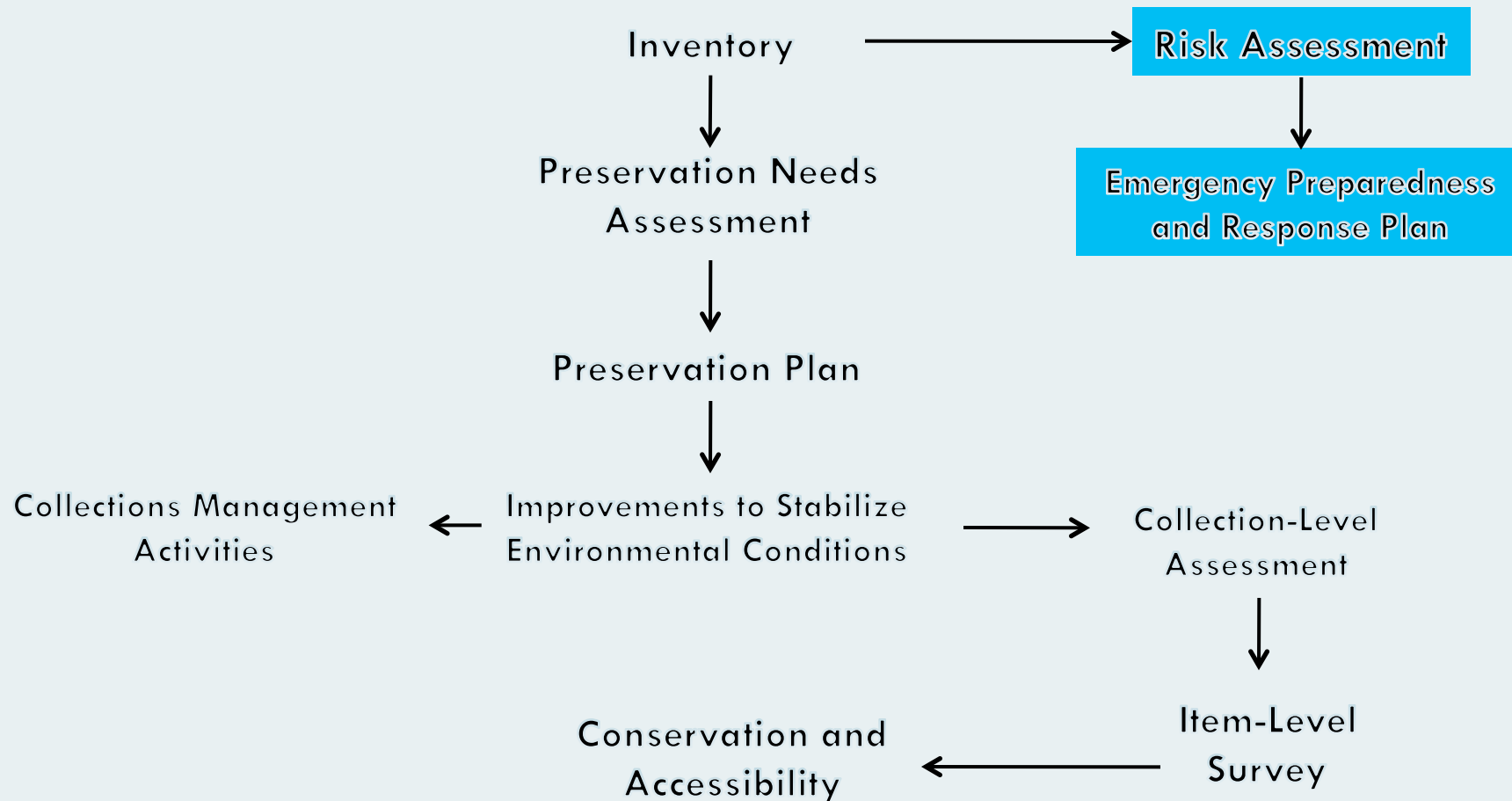
- IMLS Conservation Assessment Program
- NEH Preservation Assistance Grants for Smaller Institutions
- California Preservation Program



The Preservation Roadmap



The Preservation Roadmap



Emergency Planning

- Risk Assessment
- Emergency Planning

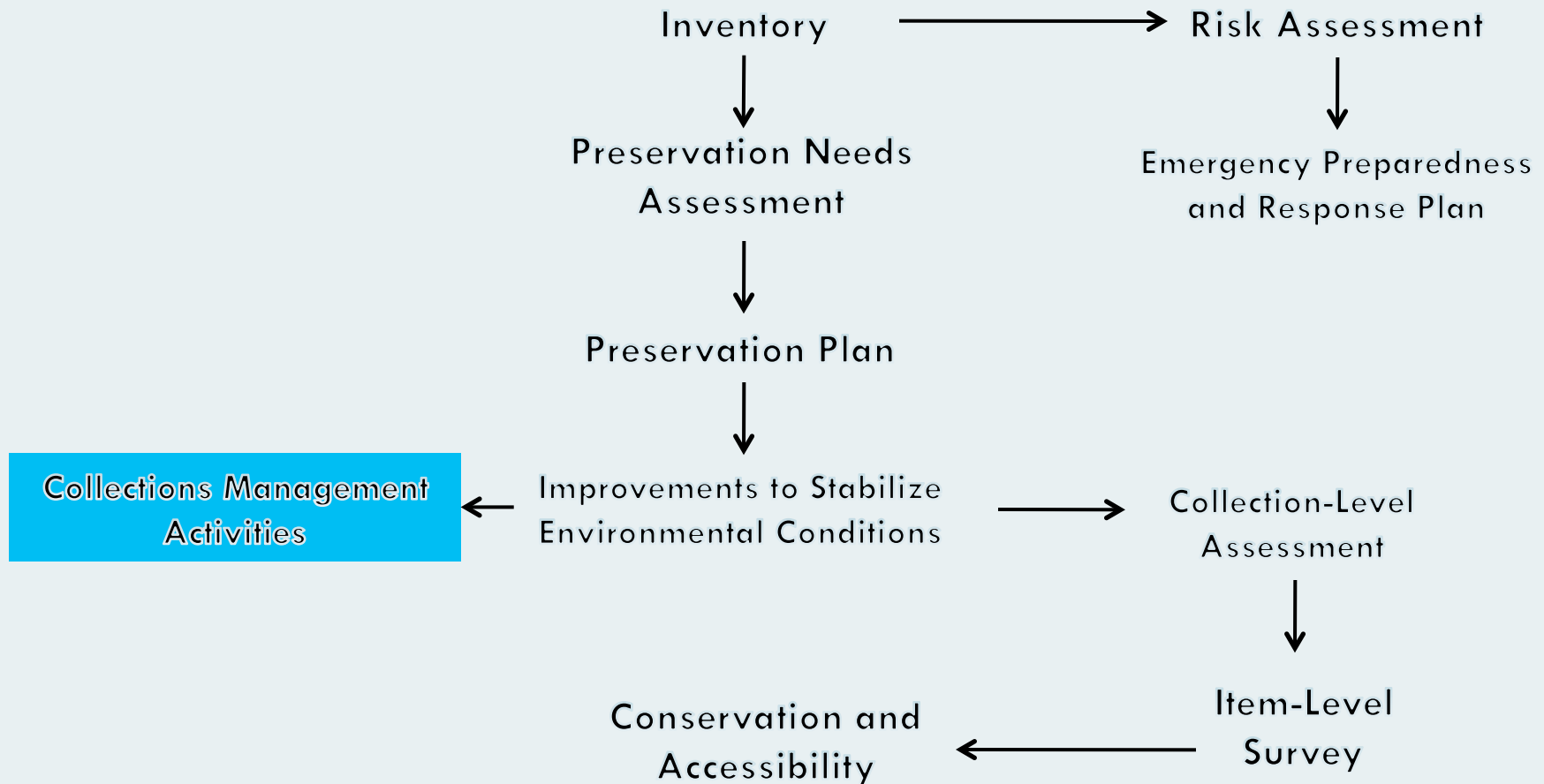
Resources for more info:

- California Preservation Program
- WESTPAS



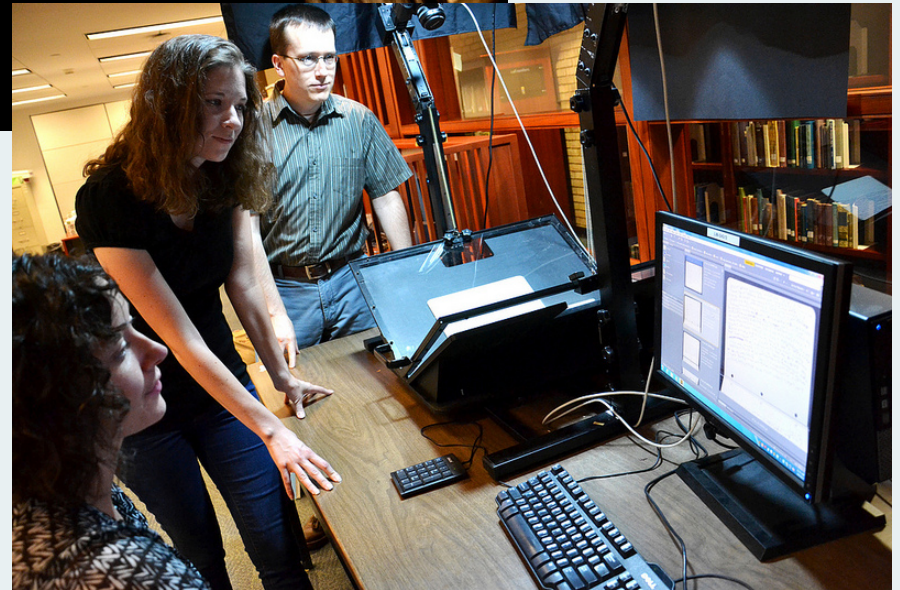
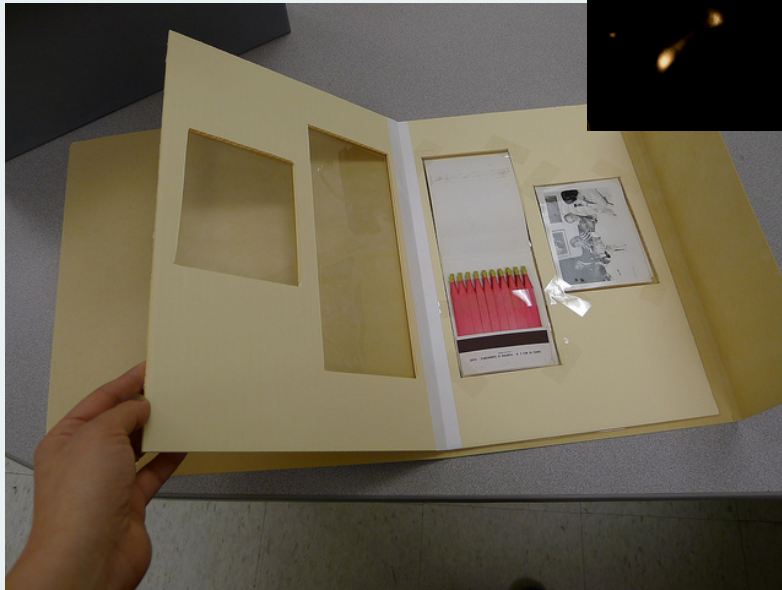
<http://news.stanford.edu/news/2006/february1/planning-020106.html>

The Preservation Roadmap



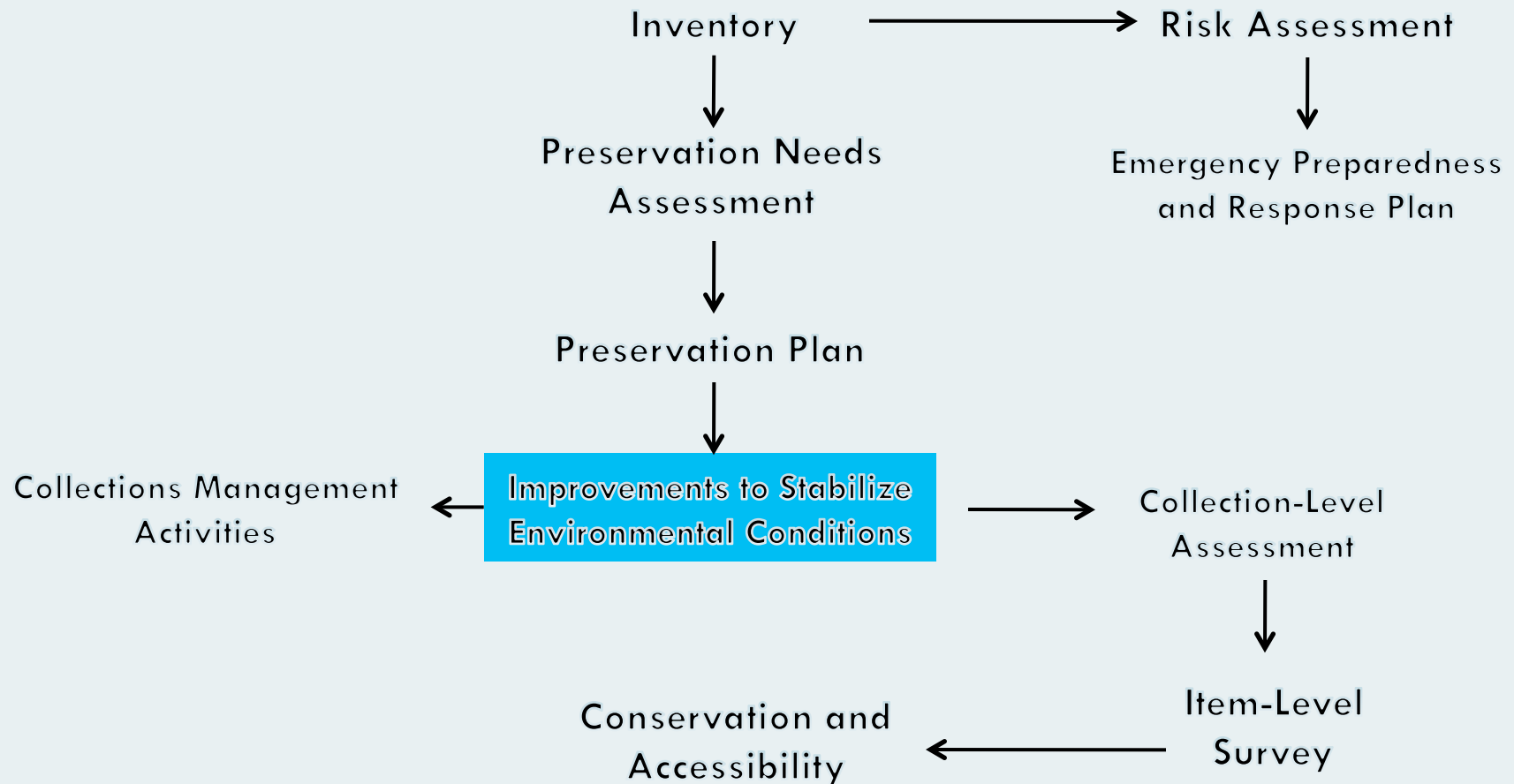
Collections Management Activities

- Cataloging
- Photography
- Rehousing



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

The Preservation Roadmap

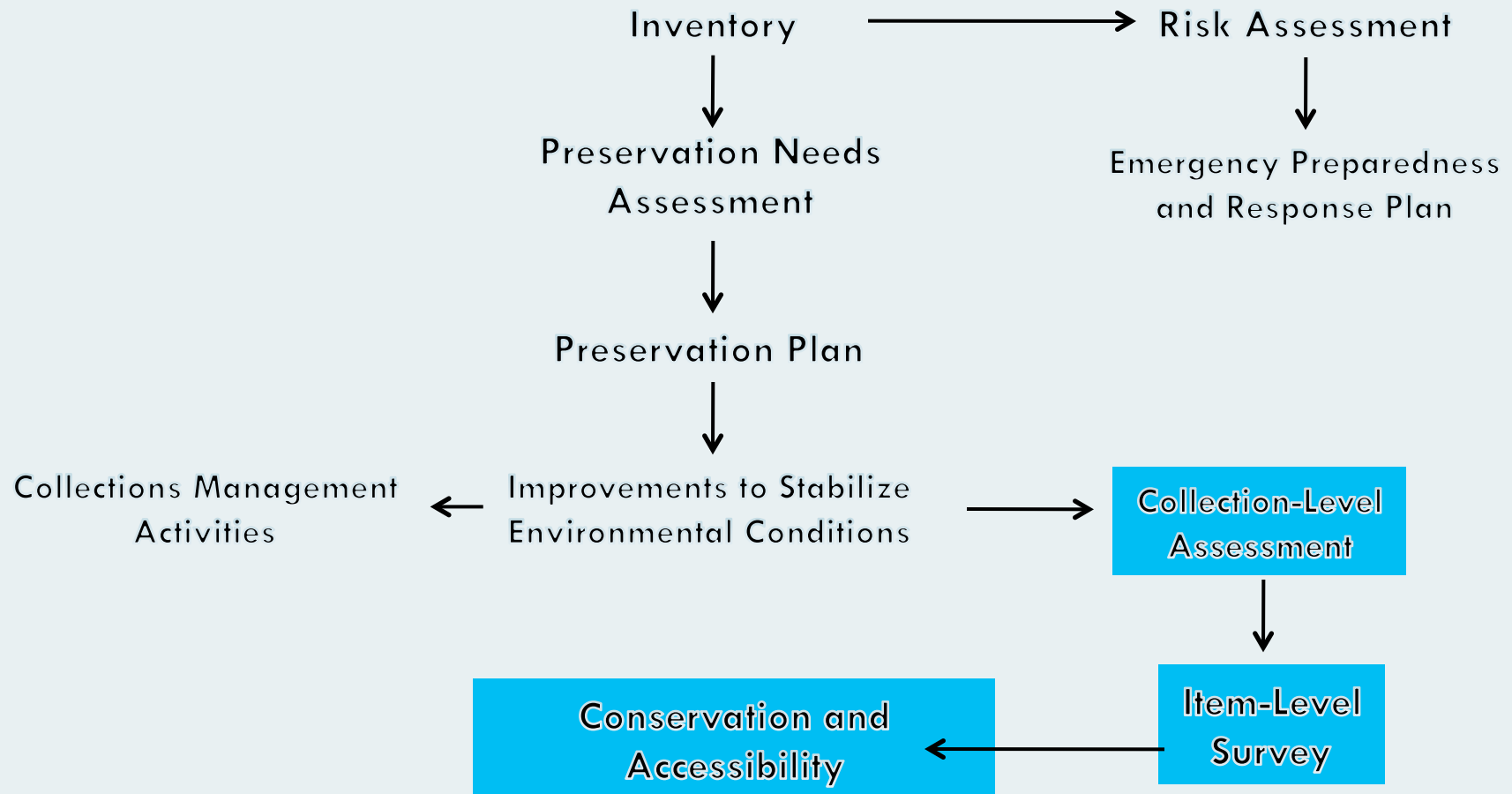


Environmental Conditions



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

The Preservation Roadmap



Conservation

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



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

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:* Revive internal system of reporting and documenting maintenance requests

Desired Outcome: Building maintenance needs are documented 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

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 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

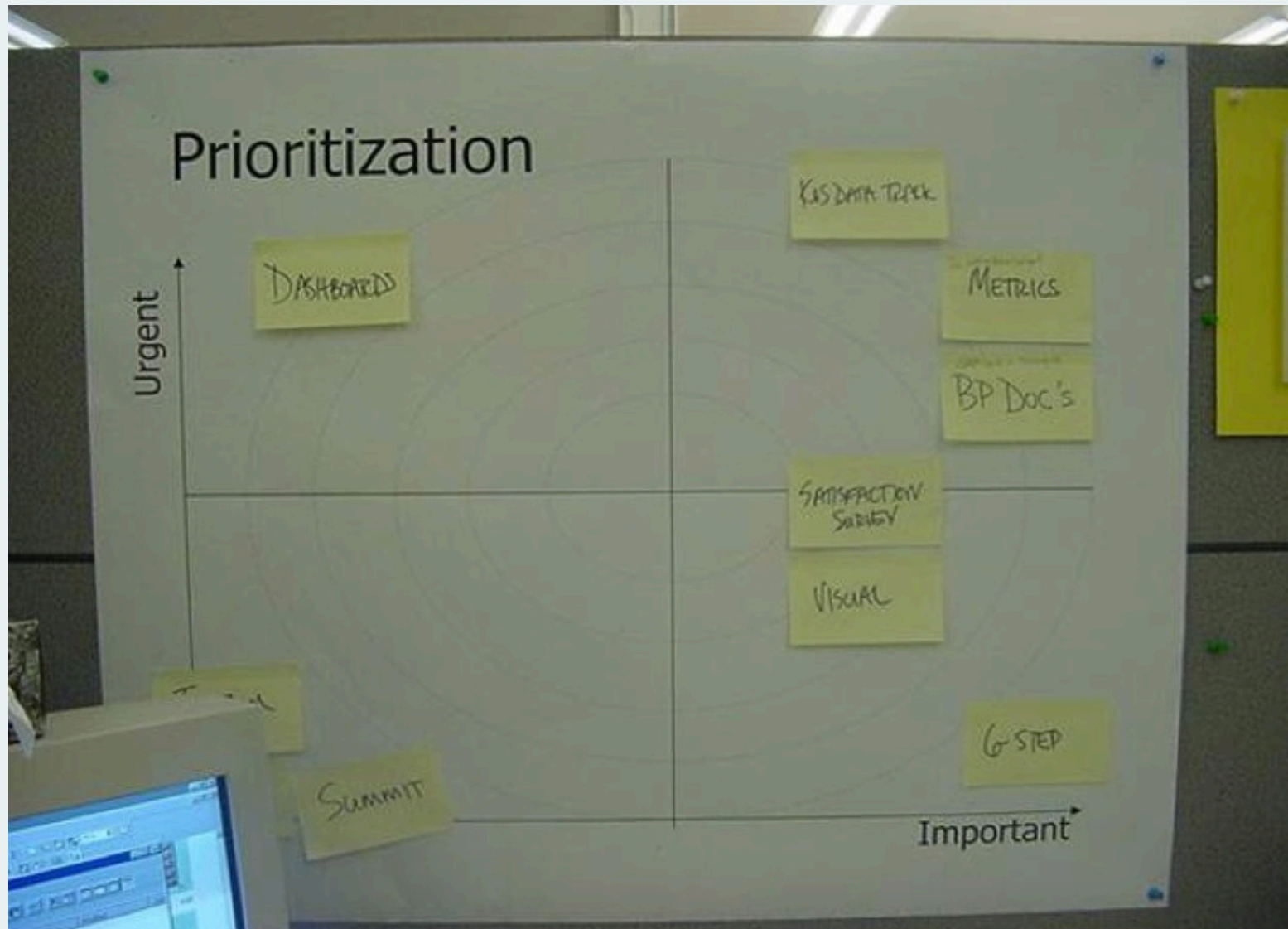
Staff Lead for Implementation	Impact	Feasibility	Feasibility/Impact Rating	Priority	Timeline for Completion
Director of the Museum and Paintings Conservator	5	4	20	High	Fall 2013-Fall 2014

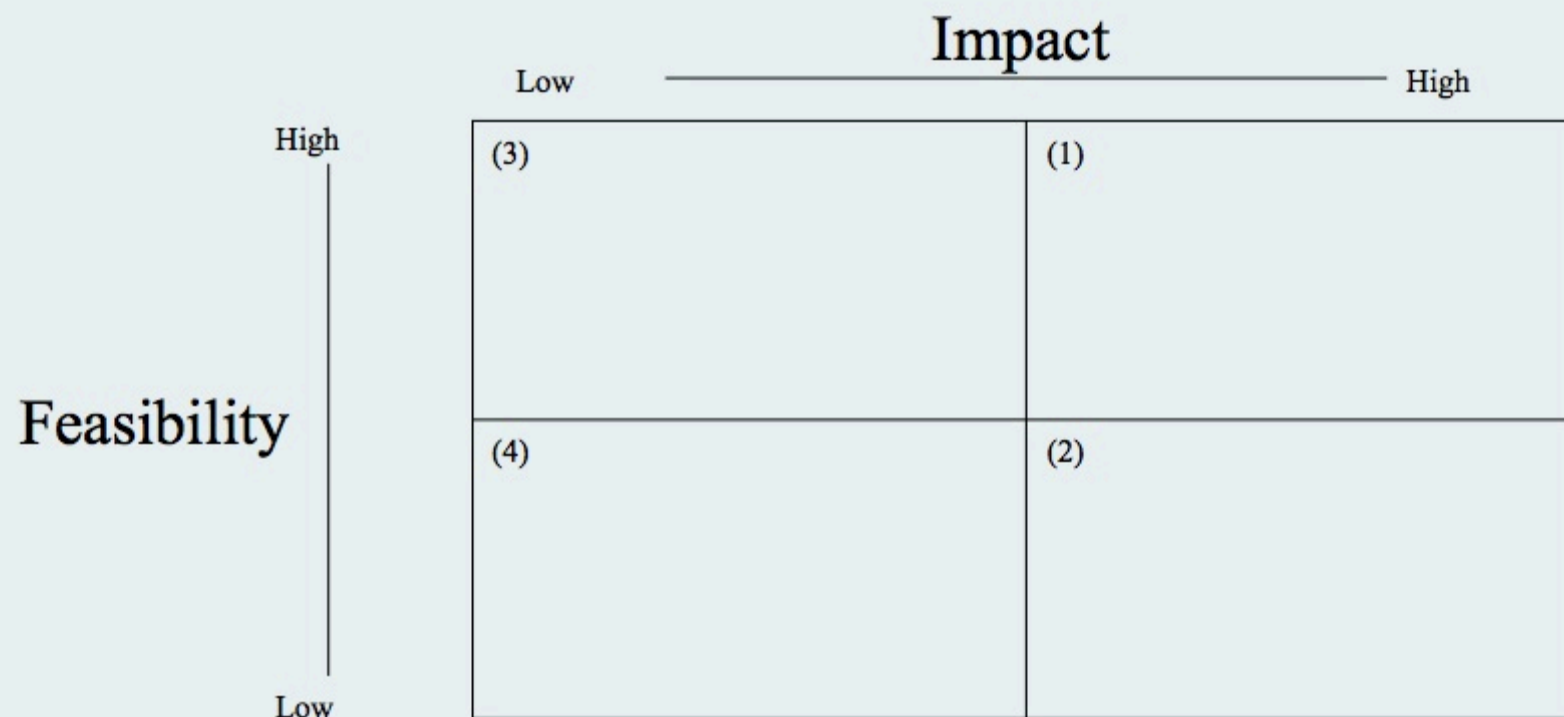
Develop a Funding Plan

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



Still Overwhelmed?





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/OMS, 1987)

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](http://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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