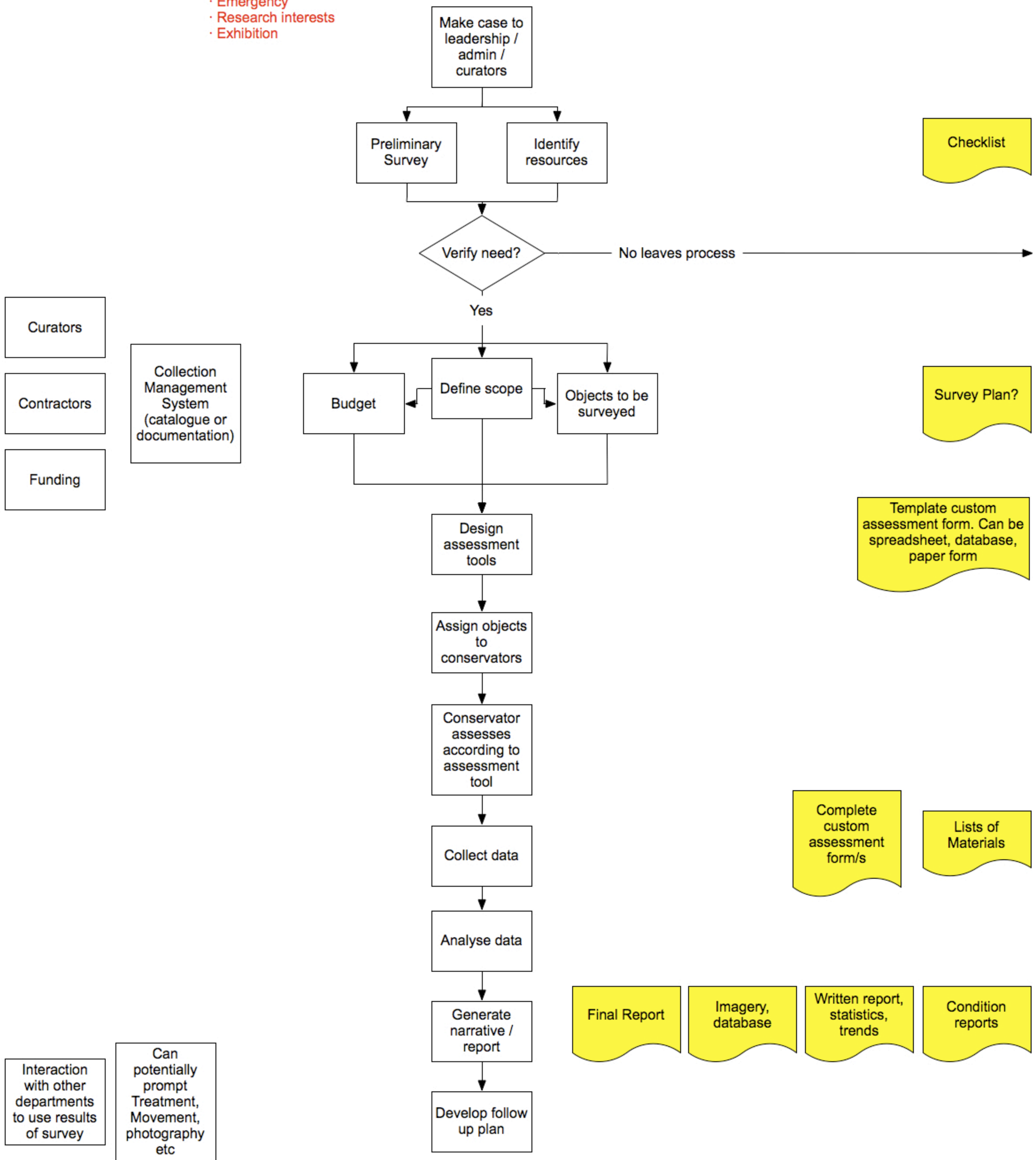


Ext/Int Events and Influences

- Trigger examples:
- Treatment need
 - Bulk acquisition
 - Preservation / Maintenance
 - De-accessioning
 - Building or Environment project
 - Broad Collection assessment
 - Emergency
 - Research interests
 - Exhibition

Survey

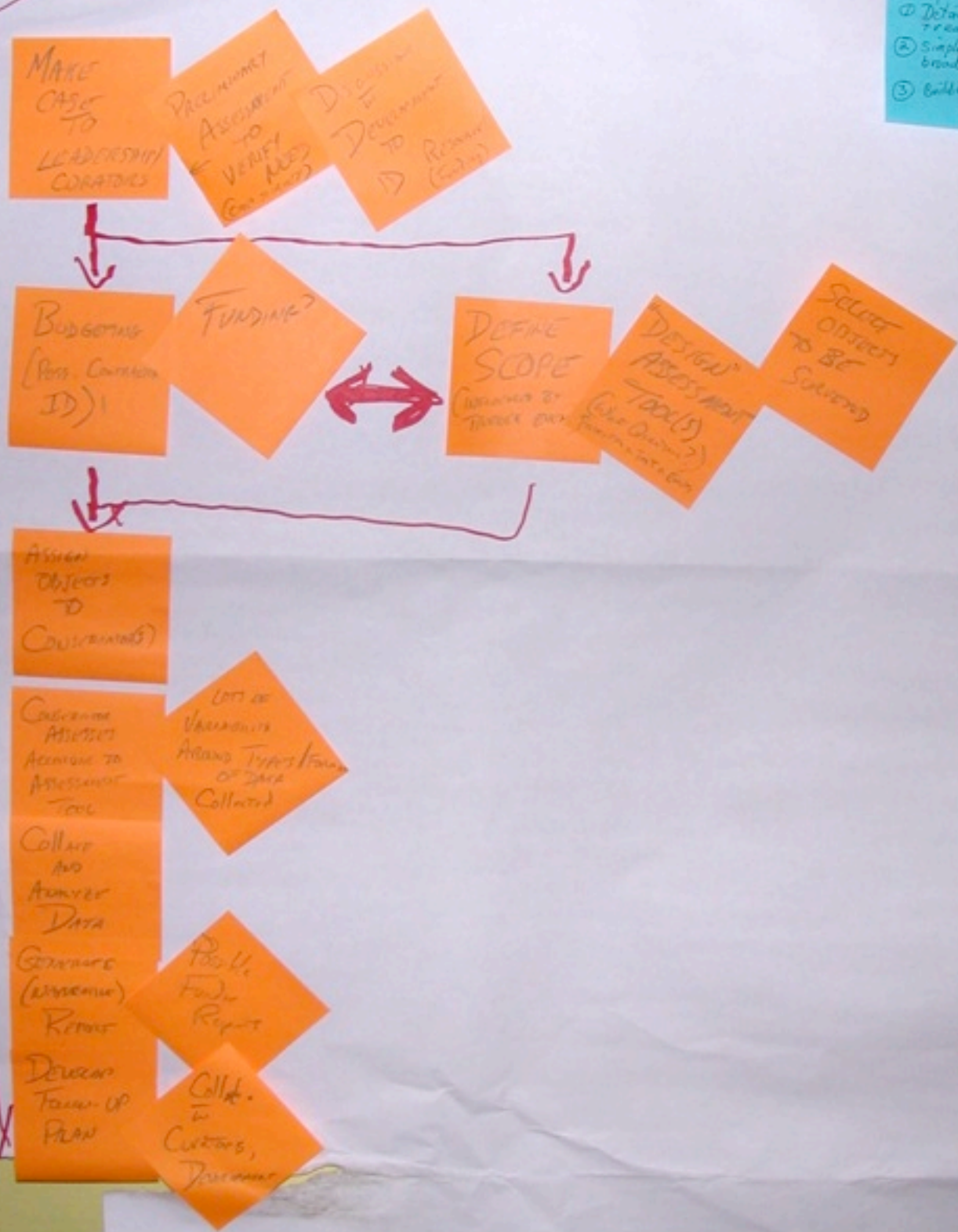
Documents



SURVEY

Survey Categories

1. Detail - for treatment group
2. Simple - for broad group of obj
3. Entry/summary



MAKE CASE TO LEADERSHIP/CORPORATES

PRELIMINARY ASSESSMENT TO VERIFY NEEDS (con. status)

DISCUSS DEVELOPMENT TO RECOMM (Solut)

BUDGETING (Pers. Commitment ID)

FUNDING?

DEFINE SCOPE (Objectives to address per...)

DESIGN ASSESSMENT TOOLS (What questions? How to collect data?)

SELECT OBJECTS TO BE SURVEYED

Assign objects to countries

Calculate Assessors Accessible to Assessment Tool

Collate and Answer Data

Generate (summary) Report

Develop Follow-up Plan

Lots of Variables Affects Types/Forms of Data Collected

Possibly Further Report

Collate in Countries, Discussion

SURVEY

collection move / new storage

Treatment planning / grant writing
(GRANT OBLIGATION for Existing Grant)

Broad collection assessment

Building / Environmental renovation

Need to Prioritize Limited Resources

APPRAISALS

STAFF REPORTS DETERIORATING MICROFILM

Emergency

Exhibition Preparation

Research Interests - Internal & external

Collection Digitization Project

➤ An awareness that an institution has a considerable amount of contemporary projects that require a novel approach to their representation.

need to understand new art technologies / materials and their alteration processes

Prioritizing resource allocation

treatment grant \$ 900

\$ grant \$ sought

new collection

replace part of collection

teaching a fellow / intern / student
how to contribute a way to
say become a teaching career

Thurs Final

Group 7
1/3

Survey

Trigger:

Treatment need
Bulk acquisition
Preservation/Maintenance
Deaccessioning
Building/Environment projects

Make case to Admin → Prelim Survey → Develop Dept Resource planning

Select objects + Scope → Budget → Design tools

Survey 1: Discussion Summary

Several different types of surveys

- Survey a small portion of collections
- Survey a large portion of the collection
- Environmental survey (structure and environmental needs)

Of those three types –we first talked about triggers

- Treatment needs
- Bulk acquisition (cost of owning)
- Preservation and maintenance
- Steps involved begin with planning

Plan with development department how results of survey can be used to do further work

Actual work to be included, scope of the survey, from that developing a budget and design tools—different tools for different projects—and even within each of those to do a large survey there would be different tools for each discipline

Then developing the team—dependent upon different disciplines—might necessitate hiring outside help

Then Conservator assesses each object, lots of variability around the types and the formats of data, coming back with filled out forms, textual summary

Develop follow-up plans

Tends to be very focused and project based.

Conservation of incoming collections or donation. E.g. condition survey for music manuscript digitization project. (Maria Fredericks)

A typical example: Library contacts conservator and conservator (independent) seeks funding, figures out feasibility. Limitations on survey based on available funding.

Example: Condition Survey for Access, (e.g. David Library)

Issues: Funding, goals

Drivers are desire for outside access, and concern about condition of materials. The plan is to sample the collection, and treat some proportion of the objects, but assess all of them in preparation for digitization. They need to survey a significant amount of the collection in order to establish priorities for treatment.

Determine Scope

Selection - Prioritization

- Survey of 10% of all items to be treated
- 25-30% of collection will be digitized (don't have to be the same objects that need to be treated)
- Create custom form

General overall – detail on selected items

Derive attributes to be described based on initial needs definition

Test drive form by having staff either staff members or contract employees who will carry out the survey use it to describe a small sample of items

Revise and finalize form

Define terminology / vocabulary for the project that can be understood by all participants. This is iterative during the form development process

Move the materials to the offices of the contract conservators

Inputs

- reports from collection information system
- existing condition reports, if any

Outputs

- receipts
- lists of materials

Conduct examination (fill out forms)

Final written report to document

- Discrepancies with existing documentation
- Trends, statistics on stability of collection (e.g. x% needs stabilization).
- Recommendations for treatment, items safe to digitize etc.

Obstacles

- Funding availability
- Anomalies, missing information in existing documentation
- Object identification

SURVEYS

PRECIPITATING EVENTS

- NEW ACQ. OF COLLECTION
- DETERIORATING CONDITION/MATERIALS
- PHYSICAL EVENT ~ CONSTRUCTION
COLLECTION MOVE
- ACCESS ~ FUNDING OPPORTUNITY
- INTERNAL/EXTERNAL DEMAND : CURATORIAL
REGISTR
- EXHIBITION

DEFINE GOAL OF SURVEY

- INVENTORY / BASELINE DOCUMENTATION
- PRIORITY TREE . TREATMENT
. DIGITIZATION
- UPDATE PRIOR WORK

PROCESS

DEFINE SURVEY PARAMETERS + SCOPE

- ENTIRE HOLDINGS
- SELECTION OF HOLDINGS

IDENTIFY FUNDING + STAFFING

- CONSERVATOR, REGISTRAR, ART HANDLER
TECHNICIAN, OUTSIDE CONSULTANT

DESIGN CUSTOM FORM

- STRUCTURE, TERMINOLOGY, DATA VALUES

EXECUTE SURVEY

TESTING PHASE + REFINEMENT

IMPLEMENTATION

OUTCOME

FINALIZED SURVEY DOCUMENTATION + COND. REPS.

· DIGITAL, DATABASE, PAPER, FINAL REP.

TREATMENT REC

INFO SHARING - INTERNAL/EXTERNAL

FINDING REPORT

Survey 2: Discussion Summary

Massively parallel, breaks down sequentially

Identifying trigger events

- self-triggered (I think it's time to do a survey)
- other staff (curators or director)
- external stakeholders
- object itself (an object crumbles to dust)

Once it's been determined that you are going to do a survey

- Consult collections management system
- Consult with curators
- Decide what you want to survey (depends on what kind of survey you are going to do)
- Decisions about scale and scope but made in consultative ways
- Next step is to design survey instruments, train staff, and assign objects to conservators

Perform the examinations

- Assess the quality of the examiners work if it's a large project
- When in this process do you update the project's history?

After assessments are done, aggregate results, write report, possibly a proposal or plan to follow on.

Obstacles and dependencies

- money
- manpower
- time

At what point in the process do you consult the previous conservation history?

Storage conditions? In some cases you react to an object differently if it's being stored under less than optimal conditions. Condition of the object itself may impact decision making. Accessibility of the object. Equipment—do you have it or not.

Timescale = days to forever

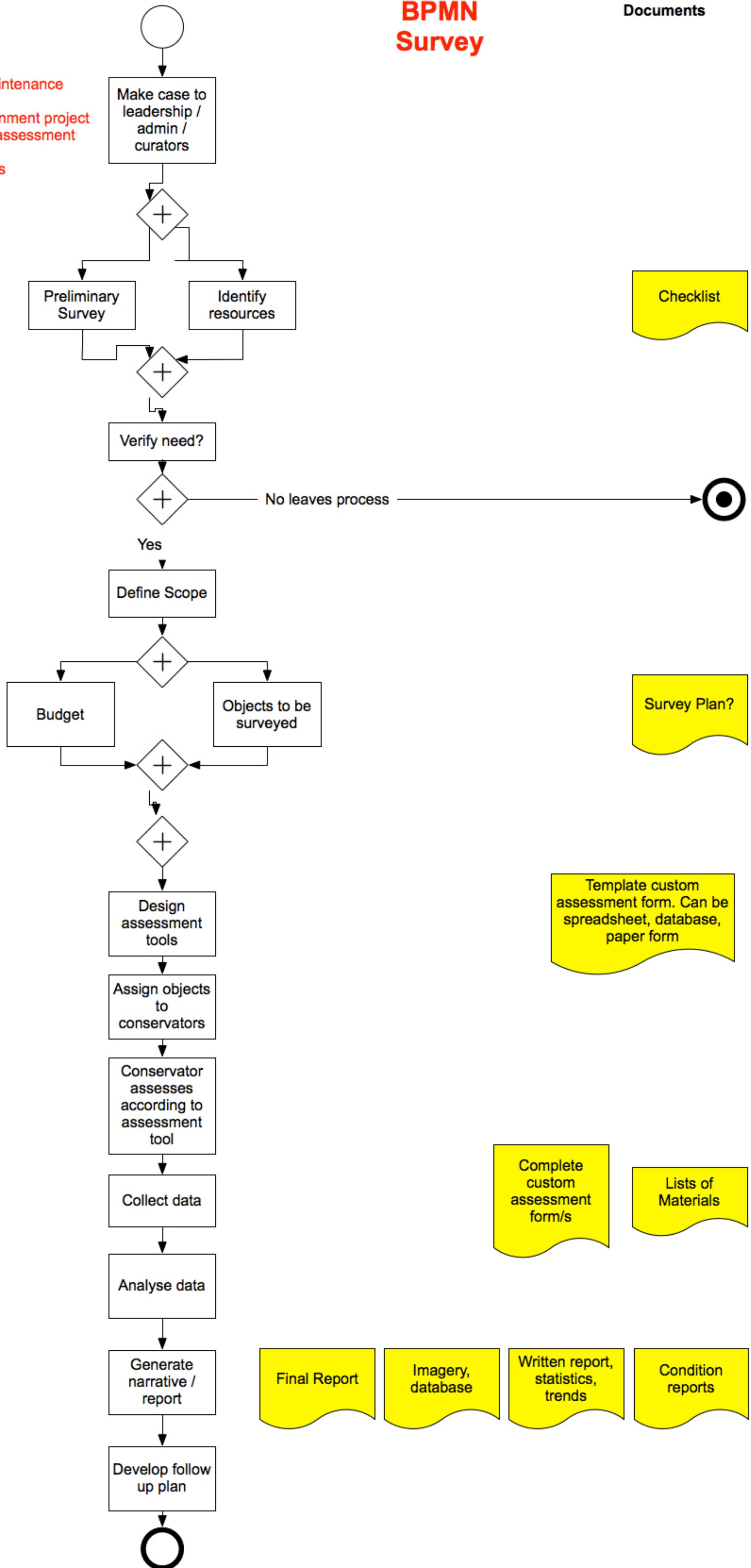
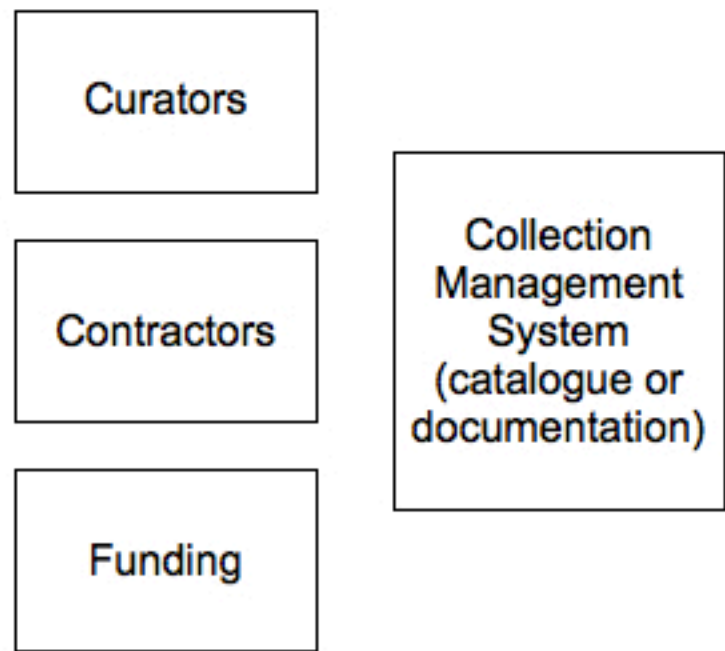
How do you catch the data that you've created and how do you create reports out of it?

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BPMN Survey

Documents



Checklist

Survey Plan?

Template custom assessment form. Can be spreadsheet, database, paper form

Complete custom assessment form/s

Lists of Materials

Final Report

Imagery, database

Written report, statistics, trends

Condition reports

Interaction with other departments to use results of survey

Can potentially prompt Treatment, Movement, photography etc