



DHPS | NY

DOCUMENTARY HERITAGE  
& PRESERVATION SERVICES  
*FOR NEW YORK*

*Thanks for joining us! Today's presentation will begin shortly.*

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Documentary Heritage and Preservation Services for New York is a five-year initiative to deliver collections-related training, preservation surveys, archival assessments, and other services to the historical records community in New York.



New  
York State  
Library



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**Website: [dhpsny.org](http://dhpsny.org)**



*New York State  
Archives*



# We'll talk about:

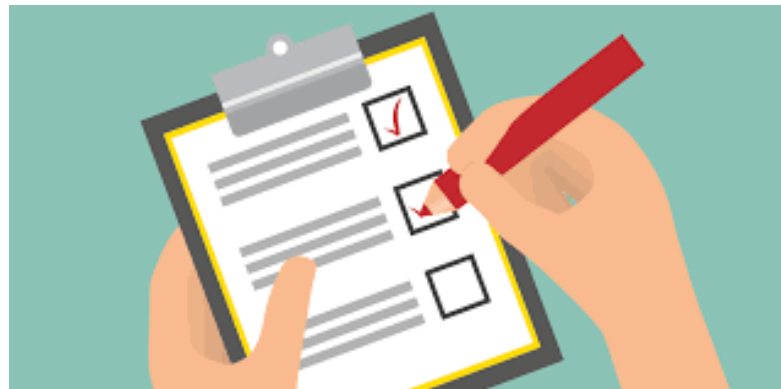
- What is an archival inventory?
- Why would you want to conduct an inventory?
- How do you approach such a big project?
- What are your next steps, when its finished?



Illustrations by Klaus Kremmerz. *Village Voice*, "Keepers of the Secrets" by James Somers, 9/20/2017

# Definition

- Society of American Archivists:
  - “A list of things”



- More accurate definition:
  - a formal list of the property in a repository, ideally connecting a physical object to a location, and to a number in the catalog or other formal record

# Basic vs. Detailed

## Basic

- An overview of your entire repository, all collections
- Always in the aggregate
- Used as an internal tool

## Detailed

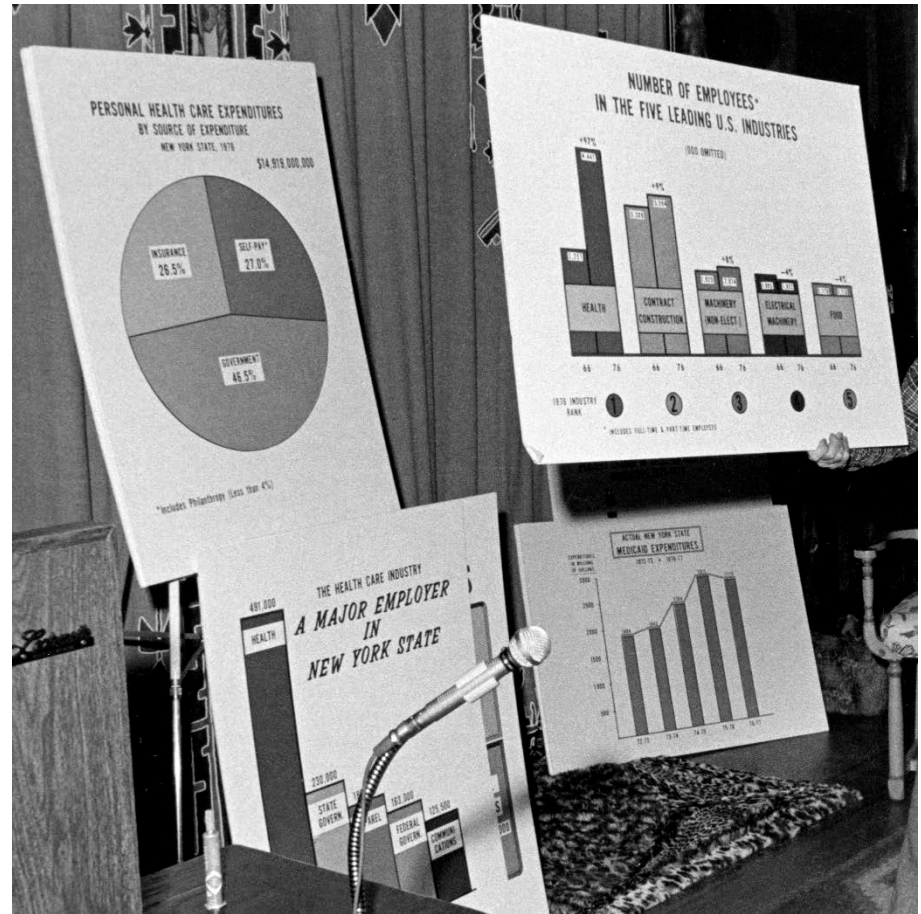
- Per collection, preliminary work done upon acquisition or pre-processing
- Reviewing *all materials* within each collection to make a listing of the series or folders
- Inventory info would be in “descriptive records”

# Why conduct an inventory?

Intellectual  
control

Accountability

Budgeting  
resources



'Dr. Kevin Cahill presenting at an economic summit', New York State Archives, 1977.



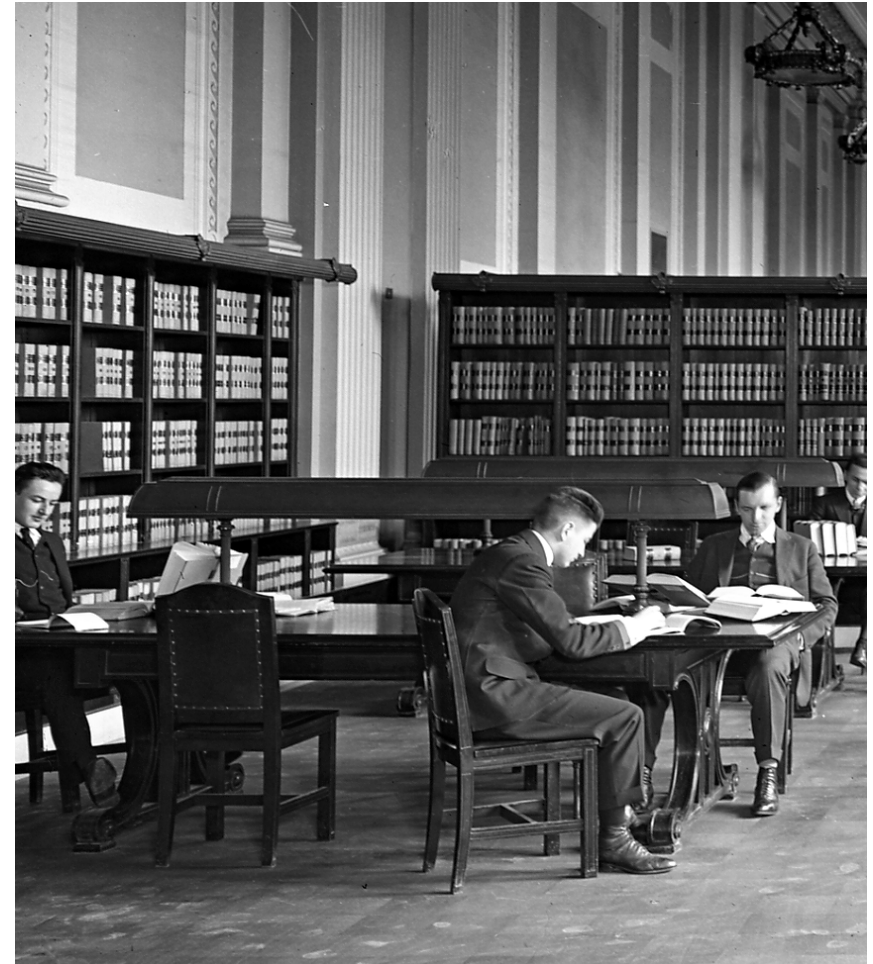
# Intellectual Control

Knowing what you have and how to find it  
is the first step in  
*being able to take care of it.*

1. Understanding the full scope of materials
  - ▣ Set Collection Development Policy guidelines
2. Know what isn't formally or accurately accessioned
  - ▣ Identify material for deaccessioning / disposal
  - ▣ Initiate internal conversations about deaccessioning

# Intellectual Control

3. Saves time – makes work easier and more efficient
4. Provide more information to users and funders
  - ▣ Supports a means to greater access
5. Develop processing priorities



'State Education Building. State Library: Law Reading Room. Albany, N.Y.', New York State Archives, 1915.

# Intellectual Control

6. Develop preservation priorities
  - ▣ Identify fragile or damaged materials
  - ▣ Monitor conditions over time
7. Is there any data missing about a collection?
  - ▣ Accession number, creator, date, etc.
8. Supports general transparency and accountability of the organization

# Accountability

## 1. Security

- ▣ Provides checks on lost, missing, or stolen materials

## 2. Insurance

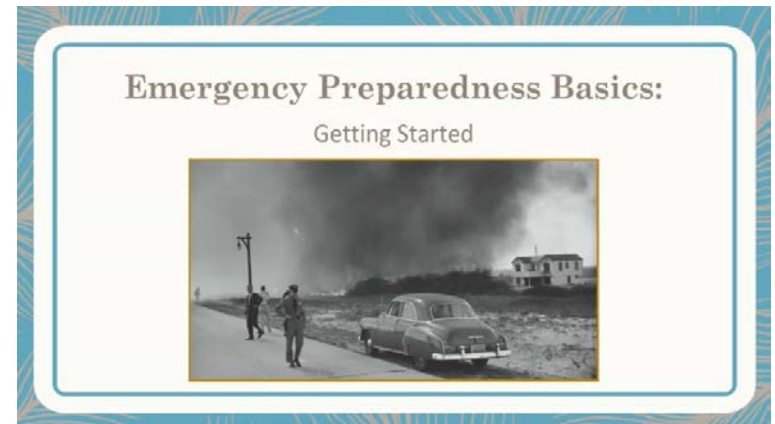
- ▣ Provides documentation for acquiring or reassessing policies

## 3. Salvage Priorities

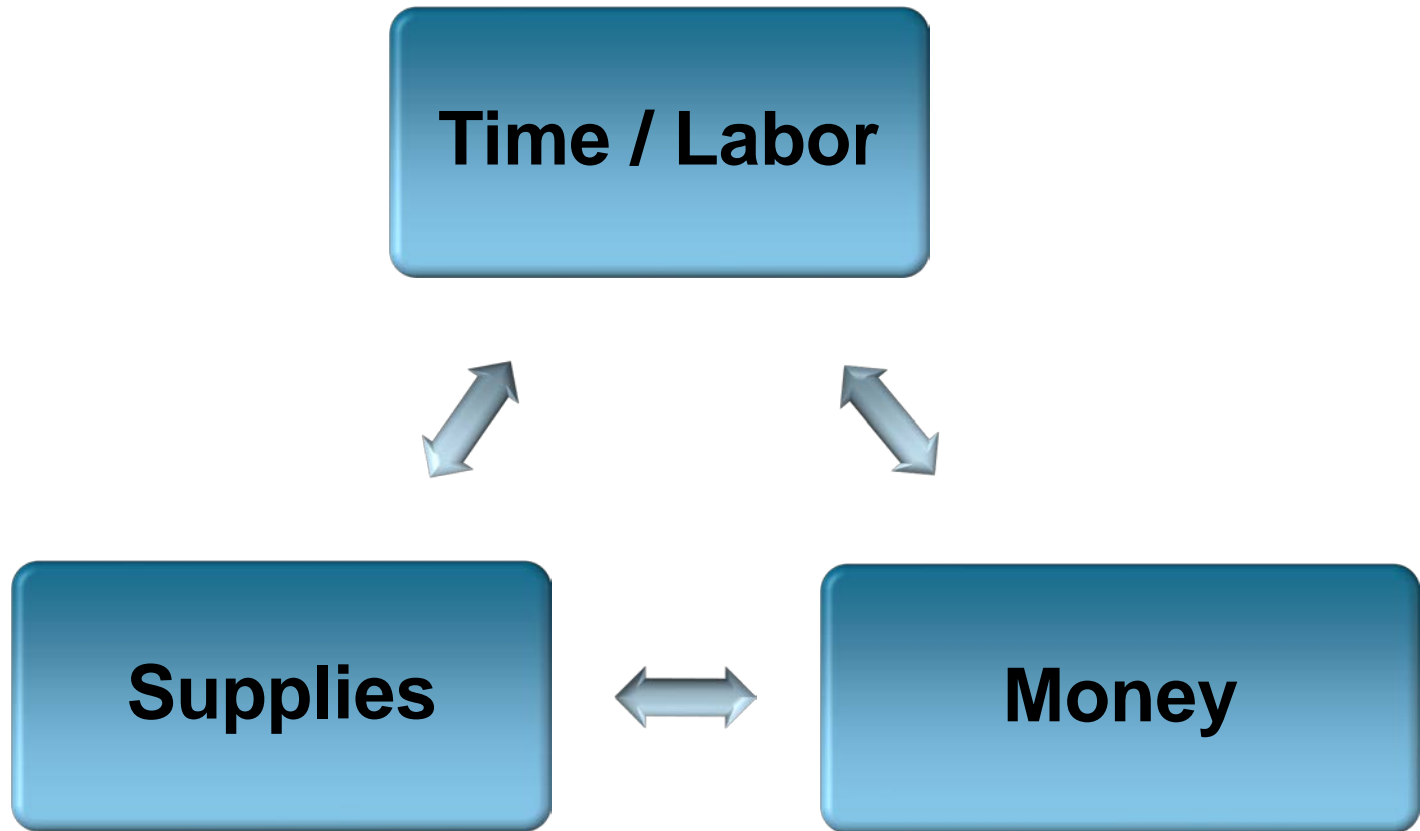
- ▣ Include in Emergency Planning and Preparedness

## Webinars

- ▣ Introduction to Emergency Planning and Preparedness [00:37:33]
- ▣ Emergency Preparedness Basics: Getting Started [01:03:30]



# Budgeting / Resources Allocation



# Budgeting / Resources Allocation

**Future collections  
management steps**

**Processing projects**

**Collections housing, storage,  
and space needs**

(Moving? Renovations?)

**Conservation needs**

# How to inventory?

Let's break down the steps!



'Sports - Football - Jim Crowley writing on blackboard.'  
The New York Public Library Digital Collections. 1935 - 1945.

# Step 1: Make a Plan

- Articulate a goal and scope for the inventory project
  - How long the process takes will depend on your resources, tools, and time commitment
- Define what information you want to capture
- Agree on the technology
  - Where to store or share a document?
  - Backups!
- Document decisions and processes (especially if the inventory is a multiple-person effort)
- Be systematic!





## ➤ 1a: When to conduct an inventory?

- **As Soon As Possible!**
- This inventory provides the groundwork for good collections management
- As part of the plan, establish a timeline for subsequent regular inventories of the collections, so that lost, missing, or stolen collection items can be identified

## ➤ 1b: What tools do you need?



'New York. Schoharie. Old Fort. Man operating Apple parer apparatus.'  
New York State Archives, 1910s.

- Spreadsheet – Excel, Google Sheets
  - Templates, pre-designed forms
- Word processing document (maybe)
- Content Management System?
  - If you have one already, determine if there are records that will support the inventory, or if you will be doing retrospective data entry into the system
- Labeling tools – temporary, for un-labeled or mis-labeled things

## Step 2: Use What You Already Have

- Has there been any past inventory work started (or completed)?
- Is there an accession register or accession records? Any form of catalog?
- Even if work was done without clear documentation, it could be a useful starting point.
- Start from the documentation you already have, and compare this to your collections
  - As opposed to first making a list of collections and then reconciling back to any existing collections documentation

# Step 3: What to Record?

- Who is doing the inventorying work
- Dates of when the inventorying work is happening
- Creator/donor, collection title
- Identifying numbers (accession, etc.)
- Medium/format (paper, microfilm, audiovisual, etc.)
- Quantity (shelves, boxes, drawers – big picture)
- Location information
- Condition Issues
- Rehousing needs or storage needs
- [Measurements]
- If there is missing information

# Step 3: What to Record?



'New York City. Central Park. Boys sketch class at work', New York State Archives, 1900.

**\*Which data fields you record will be different depending on different material types, and depending on your archive's structure and goals\***

# Key Reminders

- **Basic** means NOT working on an item level
- We're talking about listing cursory room, shelf, box, or file cabinet locations and descriptions
- An inventory is NOT a collections survey!



NY State Archive

# Key Reminders

- Check that the label on the container is an accurate description of what is inside
  - ▣ If it's not accurate – flag this!
  - ▣ Look for patterns
- Don't get bogged down in too many details
- Keep up a momentum for the project



'Ice cutting on the Hudson River, Ice going up the elevators', New York State Archives, c. 1912.

# Next Steps

## 1. Back it up!

- ❑ Arrange for copies of inventories (and all critical records, such as cataloging records, accession records, and emergency plans) to be stored off-site in a safe location, to ensure their security and accessibility in the event of a disaster.





# Next Steps

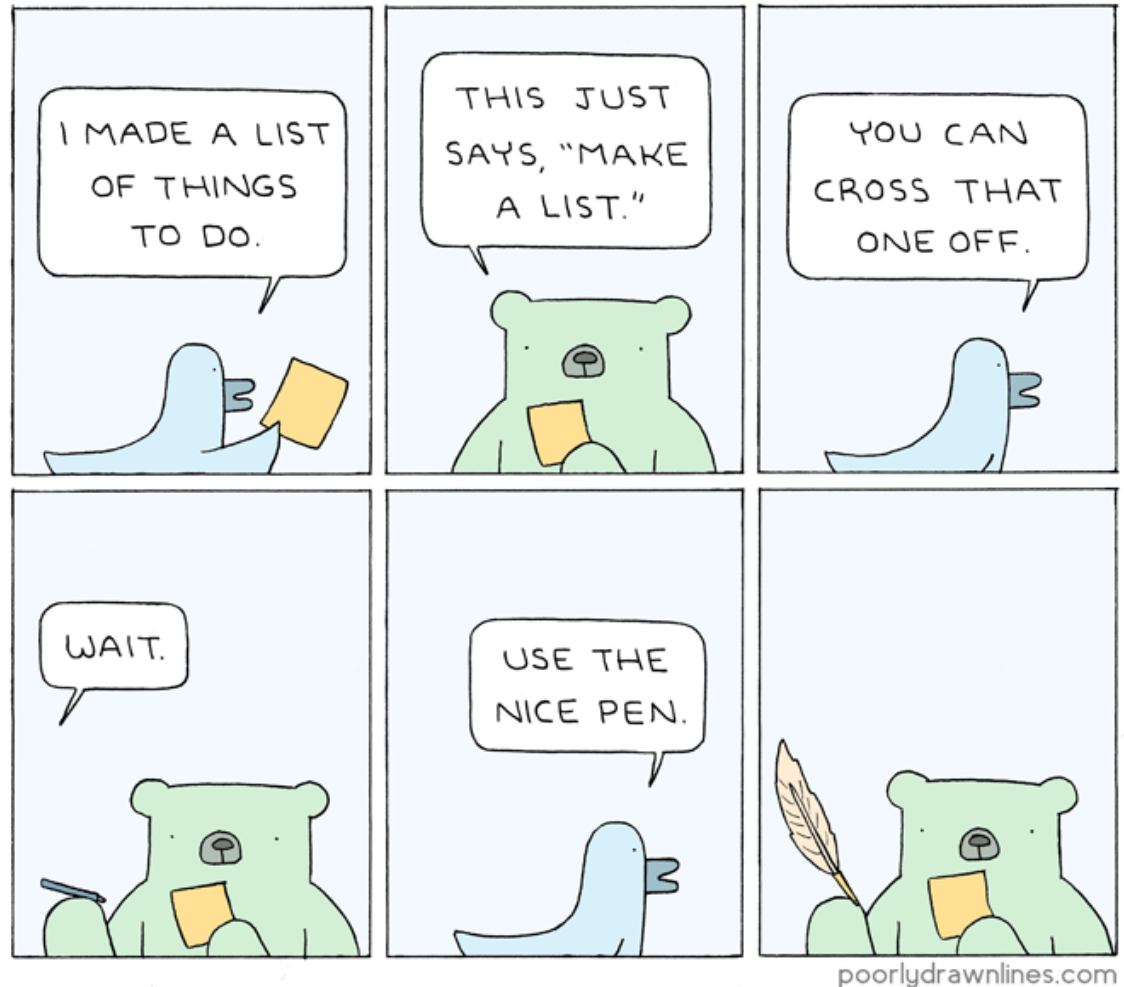
2. Implement a schedule for regular inventories
  - ▣ Spot inventories
3. Remember to update inventory when things are moved!
4. Address any “found in collection” materials
  - ▣ Make decisions to accession or dispose
  - ▣ “Accessioning!” DHPSNY webinar



‘Newsboy Selling Papers, New York City’, New York State Archives, 1936.

# Conclusions

We learned about the what, why, and how of basic inventorying – so now you can make a plan and begin making your ‘list of things’!



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## *Questions?*

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