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

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CONDUCTING A BASIC INVENTORY

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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.
Website: dhpsny.org
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 it's finished?
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.
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
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

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

Time / Labor

Supplies

Money
Budgeting / Resources Allocation

Future collections management steps

Collections housing, storage, and space needs
(Moving? Renovations?)

Processing projects

Conservation needs
How to inventory?
Let’s break down the steps!
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?

- 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?

*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!
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?
DHPSNY staff is available to answer your questions. Contact us at info@dhpsny.org or (215) 545-0613.

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