Assessments Module: Overview & Implementation

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Presenter

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What is Collection Assessment

The systematic, purposeful gathering of information about archival collections

Archives and Special Collections knowledge about holdings tend be very impressionistic and anecdotal – assessment is a move away from that.
Why Assessment

- Expose Hidden Collections

- Establish Priorities
  - Processing/Description
  - Digitization
  - Preservation/Conservation

- Overall more access, better collection management
Goals of Assessment

- Gain additional information on the content and condition of individual collections.

- Collect information that can be used for both collection management and intellectual access purposes.

- Use collection and assessment data to inform the development of institutional and consortial priorities and funding proposals.

- Help staff to think holistically.
The survey method

- **Steps in an Assessment Survey**
  - Prepare: determine scope, method, and data collection system.
  - Survey all collections and create assessment and descriptive data.
  - **Use descriptive data to make baseline level records available for all collections.**
  - Analyze assessment data and plan future projects.
Good candidates for surveying

- Completely unprocessed collections in just about any physical format, as long as they are managed archivally.

- Accruals to processed collections.

- Collections that are partially processed or done to an earlier standard that you no longer consider adequate (“underprocessed”).

- Collections that are partially described or done to an earlier standard that you no longer consider adequate (“underdescribed”).
Good candidates for surveying

All of the holdings in a repository
Pre-ArchivesSpace Assessment Tools

- Consortial Tools: PACSCL Database
- Local Databases/Spreadsheets
- Archivists’ Toolkit Assessment Module
Why ArchivesSpace

- Moving towards system integration; away from standalone databases
- ArchivesSpace is the home of all of our canonical descriptive and collection management data
- Allows us to bundle and repurpose assessment/collection management and descriptive data
Why ArchivesSpace

- Community Standards
  - Built on archival descriptive standards
  - De facto standard for assessment ratings in HSP/PACSCL model
  - Spec for assessment module developed by archival community circa 2013/2014
    - Contributions from Smithsonian, Harvard, NYU, University of Michigan and others
Why ArchivesSpace

- Ability to use our resources in ways that benefit the archival community beyond our own institution

- Assessment is a part of ethical, sustainable, and extensible processing programs

- ArchivesSpace is a way to make that work easier
MOVING FORWARD WITH ARCHIVESSPACE & ASSESSMENTS AT SMITH COLLEGE

Christie Peterson
Head of Technical Services for Special Collections
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<table>
<thead>
<tr>
<th>SMITH COLLEGE SPECIAL COLLECTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>College Archives</strong></td>
</tr>
<tr>
<td>College founded 1871</td>
</tr>
<tr>
<td>College records</td>
</tr>
<tr>
<td>Personal papers</td>
</tr>
<tr>
<td>Very little standardized data</td>
</tr>
<tr>
<td><strong>Mortimer Rare Books</strong></td>
</tr>
<tr>
<td>First room 1937</td>
</tr>
<tr>
<td>Strongly bibliographic and mss tradition</td>
</tr>
<tr>
<td>Very few online finding aids, some only paper</td>
</tr>
<tr>
<td><strong>Sophia Smith Collection</strong></td>
</tr>
<tr>
<td>Founded 1942</td>
</tr>
<tr>
<td>Personal papers, organizational records, artificial collections</td>
</tr>
<tr>
<td>Legacy db's, word docs, finding aids</td>
</tr>
</tbody>
</table>
THREE STREAMS OF ASSESSMENT DATA

Legacy Collection Assessments
- Block of text
- Created in local collections db
- Now in AS Collections Management subrecord

Move Survey
- Spreadsheet
- Preservation issues flagged in dedicated columns
- Data is about containers

New Assessments
- Access to Collections project
- Accessioning-as-processing
- Ongoing iterative processing
## Collection Management

**Processing Priority:** Low

**Processing Plan:**
Collection has some organizational structure. Recommendations for processing: Low priority. Try again for some more stuff. Open as is. There's only a dozen or so items in the collection. If this is all there is, clean it up, although it's not worth much time. Preservation needs: refolding, metal fasteners, staples, rubberbands, etc., newspaper clippings, photographs, photo albums, scrapbooks. Finding aid priority: Low. Preservation priority: Low. Research value: Low. Potential research interest: as is, very little; what there is has little depth. Past research interest: never heard of her before now!

**Rights determined?** False

**Processing Priority** Low
ASSESSMENT IS A TOOL, NOT A SOLUTION

- Assessing and prioritizing your collections will not eliminate your backlog
- Creating and migrating assessment data is work
- Assessment data needs to serve a purpose
PURPOSES FOR ASSESSMENT IN SMITH SPECIAL COLLECTIONS

• Track and report on progress
• Identify specific collection needs in an actionable way
• Identify systemic needs so they can be addressed systematically
PRINCIPLES FOR ASSESSMENT IN SMITH COLLEGE SPECIAL COLLECTIONS

• The most valuable data will be systematic
• Assessment will be integrated with other activities
• Assessment are iterative
STEP 1: LOCALIZING WITH A PLUGIN

Basic Information

Records

Existing Description

Accession Report

Appraisal

word processed

Box/Container List

Catalog Record (MARC)

Collection/Control File

Deed of Gift

Asteria

Finding Aid (EAD encoding)

Finding Aid (online)

Finding Aid (paper only)

Finding Aid (word processing document)

Finding Aid (spreadsheet)

< spreadsheet box/container list

< record transmittal form

Related EAC Record(s)
**STEP 2: REMOVE FIELDS WE DON’T WANT USED**
STEP 3: DOCUMENTATION & TRAINING

Pseudonyms
Christie Peterson edited this page 29 days ago · 2 revisions

There are a few circumstances under which we should record a pseudonym. This page documents the most common of those circumstances, and how they should be managed. (A separate page with step-by-step instructions for implementing this in ArchivesSpace will be created in the future.)

Scenario 1: Public person writes something under a "pen name," which is not the name by which they are most commonly known.

Example: in the personal papers of Mary Smith, a well-known writer, is a piece she published in college under the name "M. Sommers."

Management: Two agent records, both public, linked and with a note explaining the relationship, should be associated with the resource. It may be appropriate to assign dates to the pseudonym if it was active for a significant period of time.
Questions?

Thank you for joining us today!