Novara, Vincent J. "Preservation selection program for SCPA." Presentation to the Preservation Section, Society of American Archivists, 2016 Annual Conference, Atlanta, Georgia. August 4, 2016.

[SLIDE 1]
Today, I am going to discuss an overview of the tools and techniques for prioritization for preservation at Special Collections in Performing Arts.

[SLIDE 2] 1. Briefly about SCPA
Since 2006, I have served as the Curator for Special Collections in Performing Arts, or what I will call "SCPA." This unit collects performing arts materials that preserve performance practice, instruction, and scholarship. Formats include what you see here:

> over a mile in linear feet of manuscript collections, including over 50,000 scores; over 30,000 audio, video, and film recordings; 20,000 photographic items; more than 30 collections of official records for performing arts organizations; a print collection of over 15,000 titles; born digital collections;

… and we work in conjunction with our University Archives to collect on the performing arts *at* the University of Maryland. We are located within the Michelle Smith Performing Arts Library, a branch library unique for its extensive special collections *and* its placement in the university's performing arts center.

[SLIDE 3] 2. Collecting areas are articulated in a detailed collection management policy. I know that I'm not alone in believing that is the first step in a *preservation selection program*.

1. American Performing Arts Manuscripts
2. Band History Collections
3. Contemporary American Concert Music Collections
4. Dance Collections
5. Music Education Collections
6. Popular Music & Punk Collections
7. Performing Arts Scholars Papers
8. Official Records of Performing Arts Organizations
9. Score Collections
10. Theatre Collections
11. UMD Performing Arts Faculty Papers

[SLIDE 4] 3. Our preservation program is primarily informed by regular collection assessments by collection area – we are currently overdue for this exercise. These are performed every couple of years by subject area either for routine assessment, or due to a funding opportunity and we need to have projects at the ready. We assess for:
- Confirming level of description and processing
- Checking for any preservation concerns (carrier degradation, mold, pests, rust, etc.)

- Unmet donor commitments
- Inefficient or non-standard housing
- And simply confirming material locations match our shelf list

[SLIDE 5] 4. For selection, collections are first by prioritized using an impact and effort grid. (I can explain this nine-grid version after the session, especially how the color-coding comes into play.)

[SLIDE 6] A. Effort is defined by a number of factors, one is…
- Time to process – we use a modified version of the Estimated Processing Time grid made popular by MARBL at Emory
- [SLIDE 7] Technical demand (size, preservation concerns, complexity of materials or content) – the severity and complexity of preservation concerns and requisite actions inform this demand

[SLIDE 8] B. Impact is defined by…
- Demand for the collection (potential or realized)
- Urgency of preservation concerns and requisite actions
- Meeting commitments made to a funding source (donor, granting institution)
- Consistency with institutional mission

[SLIDE 9] C. Martha O'Hara and Merrilee Proffitt outline a helpful system in their excellent *RBM* article on "…Archival Collections Assessment" where you determine a score for Documentation Quality and Documentation Interest to calculate a Research Value Score, which also informs demand.

[SLIDE 10] 5. All of this information is then collated into a work plan for the unit, which now lives fluidly in Trello.

[SLIDE 11] Reasons why priorities shift:
- new opportunities (donor-initiated, interpretive projects, campus scholarship, anniversaries, etc.)
- increased demand for material
- conservation action events like mold outbreaks or evidence of accelerated degradation in media

The above comprises our *internal operations* for a fairly standard processing program, which are routine preservation actions. But what about our *external* preservation ventures?

[SLIDE 12] 6. UMD Libraries is home to a Preservation and Conservation Department, led by my colleagues Carla Montori and Bryan Draper. They are responsible for the preservation and conservation needs for the entire library system at UMD. Consequently, we have to be very selective about how and when we utilize their services, or enlist them to manage sending out to a vendor materials in need of conservation treatment. But given

that SCPA typically has 5-to-10 people on staff, we only turn to this department when it is something best handled by a specialist, or they possess the proper tools or expertise to perform the action. Such as:

1. Remediating significant instances of mold on collections
2. Encapsulating materials that were damaged by mold
3. Flattening large-scale rolled items – especially early twentieth century photographs
4. Exterminating pests in collections with a Zapp-Bug Oven 2
5. Sending wet materials for freezing
6. Creating special housing for 3-D objects or particularly rare and unstable print materials

Though UMD uses Atlas Systems' Aeon archives management system (see the exhibitors), we are yet to incorporate this system for tracking items sent to the Preservation Department, and we use an in-house tracking system (a.k.a. spreadsheet).

SCPA is lucky: We have staff and multiple sources of endowment funding. Yet, the fact that we have funding isn't enough (we can't just throw money at problems). Every action is a project, and each project takes planning. If my colleagues in Preservation are working on SCPA issues, then they're not working on someone else's – and even though we might have the resources, absent urgency, they can't always be working on SCPA problems. Fortunately, they empower SCPA to perform the following preservation actions:

[SLIDE 13]
1. Of course, routine archival processing and re-housing
2. Creating housing for stable, yet rare, print collections using less intensive adjustable boxing products
3. Cleaning open reel tape, just because I have a lot of experience in this area by this point as a performing arts curator
4. And, most importantly, establishing our own priorities for which collections require which level of preservation action

However, by being able to articulate the impact and effort, it is not too difficult to make reasonable cases about when and why action is needed. If it can't be right now, I know that it will be taken care of during a reasonable amount of time. Yet, one thing was left off this list…

[SLIDE 14] 7. Digitization towards preservation
- We will digitize at-risk photographs and print materials in-house on our own flat-bed scanner. We do adhere to the same specifications and standards as our peers in Special Collections & University Archives, resulting in the creation of consistent assets towards digital preservation. We are performing this work especially for punk fanzines that we've been acquiring from less than ideal environmental conditions.
- For these types of items we do one of two things:

- o We will digitize small to medium-sized collection projects in-house, or
- o For larger projects we send them out to UMD's Digital Conversional & Media Reformatting department

[SLIDE 15] About DCMR workflows
- This department is part of our IT division and is led by Robin Pike and Eric Cartier
- Materials sent to this department *are* tracked through Aeon
- We can freely send over ad hoc work (like larger patron requests) if the work does not constitute a major project or a programmatic shift
  - o These requests, of course, also result in a preservation grade digital asset for audio, video, and images
- If it *is* a major project, we are first to apply for approval to submit this project through a process similar to applying for a grant

[SLIDE 16] About DIC proposal process
- We must make the case for the project – why it's a priority, define the risks, establish the stakeholders, and so forth
- We have to either provide funding, or indicate where we can pursue funding. This means that the actual first step will be making an ask to a donor or composing a grant application
- Though this sounds like suffocating bureaucracy, it is actually a helpful process for: understanding the work that we do, sticking to priority projects, making the case to administrators, as well as preparing content for grant applications when appropriate

[SLIDE 17] For born digital preservation…
- We are just beginning to formalize and centralize the work we're doing in this area, and up until recently it has been a mixed bag of services, tools, and approaches based on the specific needs of the collections or projects
- By the end of the calendar year, that will no longer be the case

[SLIDE 18] At the heart of all of this selection work, though is simple prioritization, and understanding the needs of the materials and the commitments made to our donors and users, as well as understanding how the materials directly support the education mission of the University of Maryland