Planning & Assessment
PRESERVATION SURVEY
CONDITION SURVEY
STRATEGIC PLANNING
ARCHIVAL NEEDS ASSESSMENT
If you have questions about DHPSNY’s Planning & Assessment Services, register to join us for a special Q&A session on Wednesday, October 18th, at 5:00 PM. Staff will be on-hand to answer all of your questions and help guide you through the application process.

Documentary Heritage and Preservation Services for New York (DHPSNY) currently offers Planning & Assessment Services in four major areas. These services are designed to support New York organizations in improving and advancing program efforts while forming strategies for future growth and development. DHPSNY’s Planning & Assessment Services consist of archival needs assessments, preservation surveys, condition surveys, and strategic planning assistance. In each instance, our services aim to improve adherence to best practices and are tailored to an organization’s unique circumstances.

Archival Needs Assessments
An archival needs assessment will thoroughly examine your archival program, identifying and addressing specific organizational needs. Our assessments are conducted by an experienced archivist with needs assessment expertise. The assessment will pinpoint problems, recommend solutions, set priorities, and guide the development of your archival program.

Learn more.

Preservation Surveys
Preservation surveys focus on preventive care and mitigating deterioration and damage by analyzing policies, practices, and conditions in an institution and their impact on collections. A preservation survey is a valuable tool in fundraising for collections care and often a prerequisite for grants and other funding opportunities.

Learn more.

Condition Surveys
A condition survey is a valuable tool for institutions that have previously undergone a preservation survey and are now interested in evaluating the conditions of collection materials on a more granular level. During the condition survey process, a conservator will gather data on-site on a collection the institution has identified for the survey. This includes the condition of materials, the suitability of current housing and storage, and the conservation treatment needs of the collection.

Application Deadline for all services is March 15th, 2019

www.dhpsny.org/planning-assessment
ARCHIVAL NEEDS ASSESSMENT

SURVEY REPORT TOPICS

Goals
Administration
Collections Management
Collections Care & Storage
Building & Environment
Security & Emergency Preparedness
Additional Resources
PRESERVATION SURVEY

SURVEY REPORT TOPICS

Goals
Preservation Planning
Building Condition
Environmental Condition
Security & Emergency Preparedness
Collections Care & Storage
Additional Resources
STRATEGIC PLANNING
DOCUMENTATION
PLANNING
WORKSHOPS
WEBINARS
MENTORSHIP
ONE-ON-ONE TECHNICAL ASSISTANCE
WORKSHOPS

Past Topics

Understanding Archives
Essential Policies & Procedures
Disaster Response & Recovery
Archival Processing
WORKSHOPS

Upcoming Topics

AV Preservation
Preservation Planning
Archival Basics
WEBINARS
https://dhpsny.org/webinars

Past Topics
- Fundraising
- Finding Aid Basics
- Risk Assessment
- Digital Preservation
- Mold
- Preservation & Exhibits
- Cold Storage
- Collection Management Policies

https://dhpsny.org/webinars
WEBINARS

Upcoming Topics
Newspapers in Collections
Metadata
Institutional Records
Environmental Control
Ethics
Reformatting AV
MENTORSHIP
ONE-ON-ONE
TECHNICAL ASSISTANCE
COMMUNICATION & OUTREACH
Newsletter | October 2017

Our monthly newsletter offers a closer look at DHPSNY's efforts to provide essential programs and services to cultural institutions in New York State. This month's update includes:

- On the Road: Lincoln Center, WCNY, Empire State Aerosciences Museum, and more
- Planning & Assessment Services Applications Due November 17th
- Our Latest Planning & Assessment Services Class
- Upcoming Conferences: Join Us at MARAC, A/PHNY, and NYLA
- Final 2017 Workshop: Fundamentals of Caring for Paper Collections
- 2017-18 Webinar Schedule
Documentary Heritage and Preservation Services for New York (DHPSNY) is a statewide program that supports the vast network of unique library and archival repositories that safeguard New York's historical records. DHPSNY provides a range of free services to eligible cultural institutions throughout the state, including archives, libraries, historical societies, and museums which operate programs to preserve and make accessible records of enduring value.
SEARCH FOR HISTORICAL RECORDS REPOSITORIES
Coming Soon!

DHPSNY DIRECTORY
**RESOURCES**

**Administration**

**Archives**

**Digital Records**

**Disaster Preparedness**

**Education/Outreach**

**Exhibition**

**Grants**

**Preservation**

**Regional Resources**

**Webinar Recordings**

**Administration**

**POICIES & PROCEDURES**

- **New York State Archives Retention and Disposition Guide** – A comprehensive list of resources on retention and disposition of government and non-government records.
- New York State Museum. "Incorporating an Education Corporation."
- New York State Education Department. "Regents Charters and Regents Certificates of Incorporation for Education Corporations."

**Born Digital and Digitized Records**

- **Digital Public Library of America** – Database connecting digital resources from libraries, archives, museums, and other cultural heritage institutions across the country. Metro’s Empire State Digital Network is the DPLA hub for New York State.
- **Engineering the Future of the Past** – A blog that shares information on what the MIT Institute Archives is doing about acquiring and managing born-digital and digitized collections. Kari R. Smith, Digital Archivist is the primary blog author. For small archives, a search for “Personal Archives” will focus the information to issues relevant to managing small digital collections.
- **Stanford University Libraries. “File Naming Standards.”**
- **New York State Archives. “Digitization Standards and Guides.”** – Includes useful handouts.

**Archives**

- **New York State Archives. Archival Needs Assessment Guidelines and Template.**
- **Hidden Collections Initiative for Pennsylvania Small Archival Repositories Processing Workshop.** Holly Mengel
- **SAA. Using Archives: A Guide to Effective Research.** – Describes how to effectively research archival materials. There is also an annotated finding aid in back. This can be helpful as a guide for writing descriptive finding aids.
- **San Diego State University. Using Finding Aids.**
- **What Are Historical Records?** – Guidelines and examples compiled by DHPSNY staff to help institutions identify and categorize historical records and research materials.

**TEMPLATES & EXAMPLES:**

- **Minnesota Historical Society Collections Processing Checklist.**
DHPSNY ON SOCIAL MEDIA

TELL YOUR FRIENDS!
DHPS NY

Documentary Heritage & Preservation Services for New York

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