



CONNECTING TO COLLECTIONS

Assessment Report

After an assessment is conducted, Heritage Mentors must complete a report that: 1) summarizes the assessment; and 2) helps the organization to prioritize up to five next action steps.

Through the report, MentorCorps members will create a roadmap and inform important decisions regarding next steps towards collections management and disaster preparedness.

Keep in mind that the goal of this report is to inspire and empower an organization to strategically meet immediate and/or long-term needs. The report should help a library, museum or archive deal with the most pressing challenges it faces.

Remember to use simple rather than over-technical language when writing the report.

Summary of the Assessment

The assessment summary should provide information on the following topics:

- General information about the organization and the goals of the assessment
- Staffing and staff training needs
- The condition within exhibit galleries, reading rooms, library stacks, collections storage areas, workrooms, and other areas of the building
- Climate control and environment (temperature, relative humidity, light levels, pest control, housekeeping)
- The collections and their conditions, as well as policies and procedures governing their access and care
- Organizational emergency preparedness and response

This information should be derived from the walk-through during the on-site visit. Remember to add positive notes on what the organization is doing right.

Recommended Action Steps

The key concerns brought up by the staff and volunteers during the walk-through should inform the action steps that the Heritage Mentor recommends. However, we again remind you that your expertise and training should also inform the action plan that you propose to put in place. Again, as a Heritage Mentor, you have the advantage of assessing an organization from a fresh point of view.

When recommending action steps, think about what not only puts the heritage organization most at risk, but also consider what can be achievable and make the most critical impact.

The action steps identified are intended to help libraries, museums and archives practice better informed and more active collections management. They can address collections management issues such as space concerns, optimizing storage efficiencies, burgeoning backlogs, integrated pest management, environmental monitoring, historic housekeeping, or implementing any range of policies and procedures.

The action steps should also focus on emergency preparedness and response. Does the organization have a disaster plan in place? If so, does that plan include events such as accidental damage to collections, outbreaks of pests and mold growth, fire, power/HVAC failure, vandalism, and water damage? Are there clear instructions for emergency personnel to follow during the phases of discovery, assessment and recovery? Is there an emergency call list as part of the plan? Is there a disaster response kit available for use?

If not, these are examples of what can be built in as recommended action steps to take.

Action steps can also include recommendations for staff and volunteer training in areas of collections management and emergency preparedness and response.

Follow-Up Visit

After the report is completed, it's important that the Heritage Mentor schedules a follow-up visit to sit down with the organization to discuss the assessment findings and talk about the recommended action steps outlined in the report.

During this visit, Heritage Mentors should provide useful tools that could be used in achieving these steps, discuss onsite collections management and disaster planning training and one-on-one in-person or over-the-phone consultation, and point to more information available online.

Heritage Mentor:	
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Date of Assessment:	
Date of Report:	

Organization:	
Organization Contact Information:	

Assessment Summary

General information about the organization and the goals of the assessment (+/- 150 words)

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Staffing and staff training needs (+/- 100 words)

The condition within exhibit galleries, reading rooms, library stacks, collections storage areas, workrooms, and other areas of the building (+/- 100 words)

Climate control and environment (temperature, relative humidity, light levels, pest control, housekeeping) (+/- 100 words)

The collections and their conditions, as well as policies and procedures governing their access and care (+/- 125 words)

Organizational emergency preparedness and response (+/- 125 words)

Recommended Action Steps

1	Action Step:
	<i>Details:</i>
2	Action Step:
	<i>Details:</i>
3	Action Step:
	<i>Details:</i>
4	Action Step:
	<i>Details:</i>
5	Action Step:
	<i>Details:</i>

Notes from Follow-Up Visit