



CONNECTING TO COLLECTIONS

How to Conduct an Assessment

The goal of an assessment is to enable library, museum and archival staff to develop or improve their overall collections care program, and to establish preventive conservation as an integral part of the organization's mission.

An assessment by the MentorCorps should encourage organizations to consider their own needs and capacities. As an ambassador of the MentorCorps program, you will help foster a growing community of best practices.

A key to making the assessment successful is to understand the particular organization you are assessing. To achieve this, Heritage Mentors must determine how the organization works on a day-to-day basis and what it can reasonably achieve.

To help prepare for your assessment, we recommend that you peruse the organization's website. You may also want to contact the organization ahead of time for copies of organizational promotional materials, administrative documents, policies and procedures, and handbooks and reports. A list of key documents that you may wish to review before you visit may include:

- Mission statement
- Names and positions of staff, key volunteers, and board members
- Organizational history, building history, brochures, and other printed promotional materials
- Strategic Plan or Long-Range Plan
- Collections Management Policy
- Disaster Plan (or Emergency Preparedness and Recovery Plan)
- Surveys and reports by other consultants (such as Museum Assessment Program (MAP) and Conservation Assessment Program (CAP) assessments or other reports concerning care and management of collections)
- Facility Report
- Environmental monitoring records

Heritage Mentors must keep in mind that libraries, museums and archival organizations face unique challenges. Staff and volunteers strive to do their best while wearing many hats – no matter if the organization is small, medium, or large.

Staff and volunteers might be anxious about your visit. It is important that they understand that you will not be picking out their deficiencies. The role of a Heritage Mentor is to evaluate, not inspect – to help the organization realize its mission and do the best work it can do.

As a Heritage Mentor, you must keep in mind that mentoring is relationship-based work. Establishing trust is critical as this will be the beginning of what will hopefully be a long relationship. Open and positive communication is important to building a healthy rapport. As a Heritage Mentor, you are there to utilize your expertise and training to ensure that the organization succeeds.

What's special about being a Heritage Mentor is that you have the advantage of assessing an organization from a fresh point of view. Your assessment factors in current standards and best practices and shares models and resources for recommended changes. No matter what, you're there to help – you are a Heritage Mentor because you, too, work for an organization that is doing the best it can.

Heritage Mentors need to carefully articulate the reason – or reasons – for which an assessment is taking place. It is important that the objectives are clear and the goals and outcomes are clearly defined.

Knowing your audience is important. This can be achieved by speaking in simple terms and, most importantly, listening. Inviting staff and volunteers to accompany you throughout the assessment is critical to the overall process.

When conducting your assessment:

- Be sure to give as much positive feedback as possible by emphasizing and praising what the organization is doing right.
- Frame room where they can improve as “challenges” the organization faces.
- Don't be judgmental in your assessment, but rather be always be helpful and identify simple and clear steps to make “wrongs” right.
- Always keep your eyes and ears open. Be sure to document the conditions in front of you and listen to the concerns of the staff and volunteers that are leading you through.
- Strive to understand how an organization gets things done as well as why it doesn't get other things done.

- Be comfortable asking challenging questions, but be sure to make positive comments to help put everyone at ease.
- Offer guidance that's supportive and nonjudgmental.

During the walk-through, be absolutely sure to tour every storage room, work space, gallery, reading room, library stacks, copy services or any other areas that holds collections. For dedicated sacred storage, determine if arrangements can be made ahead of time to access this space. Keep in mind that the walk-through is not limited to these areas alone, but should also incorporate a comprehensive attic-to-cellar approach to accessing and assessing an organization.

Sometimes staff and volunteers forget about going down to the basement where program use materials, old paint cans, or exhibit furniture are stored. Perhaps there's a fire hazard, materials at risk in case of a flood, or moisture infiltration that has gone unnoticed. During the walk-through, consider how your guides view the collections and the building.