

PRESERVATION PRIORITY WORKSHEET

Priority Score (1=high, 9=low): _____

INSTITUTION: _____

BUREAU: _____

DIVISION: _____

REPORT #: _____

Series/Collection Name: _____

Location: _____

Bulk Dates: _____

Collection Size - number of items: _____

number of linear feet: _____

number of cubic feet: _____

Originals/copies (format): _____

Surveyor(s): _____

Survey Dates: _____

Current Housing: Appropriate materials, techniques and orientation? (circle all that apply and indicate percent of collection):

Furniture:

shelves (open/closed)

drawers (vertical/flat)

racks (vertical/horizontal/roll)

Containers:

boxes (record/document/print/phased/box)

folders/envelopes (group/individual)

enclosures (plastic/paper/mats)

Container/Item Sizes:

letter

legal

oversize

Part I of Preservation Selection – Value Assessment of the Records

1. Do the records relate to the:

Mission Statement of the institution in terms of:

the topics that are being documented? (i.e. what are the topics?)

Yes ___ No ___

the stated purpose? (i.e. what is the purpose?)

Yes ___ No ___

the institution's users? (i.e. who are the users?)

Yes ___ No ___

Collection Policy of the institution in terms of:

the general and specific functions/topics that are of interest?

Yes ___ No ___

the relationship of the repository goals to the goals of other repositories?

Yes ___ No ___

the relationship of the known world of related documentation of the functions/topics

Yes ___ No ___

If the answer to most of the above is Yes, proceed to question #2 below.

If the answer to most of the above is No, then choose one of the following four options.

- a. Do not accept the records.
- b. Refer the records to another institution.
- c. Deaccession the records.
- d. If the records are retained, do not take preservation action.

2. Does the institution have legal custody of the records or the expectation of obtaining legal custody?

Yes ___ No ___

Are the records accessible to users without excessive restrictions or hinderances?

Yes ___ No ___

Are there resources to preserve and maintain the records or the expectation of obtaining resources?

Yes ___ No ___

(resources = policy, environmental control & space, storage furniture & supplies, staff, training, time & funds)

If the answers to all of the above are Yes, proceed to question #3 below.

If the answer to any of the above is No, defer preservation action until remedied.

3. Are the records of importance to the institution primarily:

because of their value to researchers?

Yes ___ No ___

If Yes, plot evidential vs. informational value on Matrix 3 below.

to meet its operational needs or the operational needs of other creating institutions?

Yes ___ No ___

If Yes, plot evidential vs. informational value on Matrix 2 below.

for both operational purposes and for research value to others?

Yes ___ No ___

If Yes, plot evidential vs. informational value on Matrix 1 below.

In using the matrices below, keep in mind that:

evidential value pertains to the administrative, fiscal, legal or institutional significance of the records.

informational value pertains to research value for historical, educational, genealogical reasons, or use in public programs.

intrinsic value pertains to the artifactual, monetary, symbolic, or sentimental value.

Determine whether the evidential and informational value as defined above is High, Moderate, or Low.

Plot the evidential vs. informational value on the appropriate matrix to determine the overall value.

Consider deferring analysis of low value materials until after analysing high or moderate value materials.

If the Overall Value is High proceed to Part II; if Low, stop further analysis - take no action.

Matrix	Evidential Value			Matrix	Evidential Value			Matrix	Evidential Value					
1	A-High B-Mod. C-Low			2	A-High B-Mod. C-Low			3	A-High B-Mod. C-Low					
Infor- mational Value	A-High	A	A	B	Infor- mational Value	A-High	A	A	B	Infor- mational Value	A-High	A	A	B
	B-Mod.	A	B	C		B-Mod.	B	B	C		B-Mod.	A	B	C
	C-Low	B	C	C		C-Low	B	C	C		C-Low	C	C	C

Enter the Value Score in the space provided in Part III-1. on the next page.

Proceed to Part II - Risk Assessment of the Records.