TEXAS HISTORICAL COMMISSION

REAL PLACES TELLING REAL STORIES

The Inside Scoop on Inventories

Welcome!

The webinar will begin at 10:00 a.m. CT.

While you wait:

1. Download PDFs of the webinar slides and handout under the “Handouts” tab of your control bar.

2. Confirm that your speakers are turned on and your audio is working by doing a sound check in the “Audio” tab of the control bar. Having problems? Exit and restart the webinar or switch to “phone call” for a phone number and access code to hear the audio through your telephone.

TEXAS HISTORICAL COMMISSION
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Museum Services

The Museum Services Program provides support, resources, and training to museums in Texas.

- Consultations
- Webinars and workshops
- Resources

Museum Services

www.thc.texas.gov/museum-services

On our webpage:

- Webinars
- Workshops
- Grants and Fundraising
- Helpful Resources
- Connect and Learn

Museum Services

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TEXAS HISTORICAL COMMISSION
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Upcoming Free Museum Services Webinars

www.thc.texas.gov/museumwebinars

- Children's Museums in a Pandemic: Reflecting on the Past Year
  - Tuesday, March 30, 2:00 p.m. CT
- Countless Facets of Texas: The General Land Office Map Collection
  - Thursday, April 15, 2:00 p.m. CT
- Putting it on Paper: Incorporating MOUs into Your Community Engagement Plans
  - Thursday, April 22, 2:00 p.m. CT
- Inclusive Museum Leadership
  - Thursday, May 6, 10:00 a.m. CT
- Exploring Social Justice on a Limited Budget
  - Thursday, May 13, 10:00 a.m. CT
- Moving from Theory to Practice: Doing the Work of DEAI
  - Thursday, May 20, 10:00 a.m. CT

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Upcoming Free Webinars from Other Orgs

www.thc.texas.gov/museumconnections

- *Managing Collections Management Software*, March 18, 3:00 p.m. CT, National Emerging Museum Professionals Network
- *Beyond Statements: Leading Racial Equity in Humanities Organizations*, March 22, 9:00 a.m. CT, Maryland Humanities
- *Foster an Inclusive Culture for Your LGBT+ Staff and Partners*, March 24, 1:00 p.m. CT, Candid
- *Social Media Benchmarking: A Look at Ongoing and Evolving Evaluation Projects in Action at the Cleveland Museum of Art*, March 24, 1:00 p.m. CT, American Alliance of Museums
- *Sharing Women's History: Exploring New Stories and Formats for Engaging Audiences*, March 25, 10:00 a.m. CT, Wisconsin Historical Society
- *Nonprofit Collaboration: Shared Authority and Partnerships*, March 25, 1:30 p.m. CT, Mid-America Arts Alliance
- *Ask About Access*, March 25, 2:00 p.m. CT, Chicago Cultural Accessibility Consortium
- *Grant Writing Basics*, March 25, 7:00 p.m. CT, National Emerging Museum Professionals Network
- *Historic House Museums in the 21st Century: Reimaginings and New Solutions*, March 26, 2:30 p.m. CT, Stenton
- *Respectful Ways to Deepen Volunteer Giving*, March 31, 11:00 a.m. CT, New England Museum Association
- *ADA and Website Accessibility: What You Need to Know*, March 31, 1:00 p.m. CT, Marcum LLP

TEXAS HISTORICAL COMMISSION
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Stephanie Allen-Givens and Lindsey Richardson

THE SIXTH FLOOR MUSEUM
AT DEALEY PLAZA

The Inside Scoop on a Collection Inventory Project from The Sixth Floor Museum

By Stephanie Allen-Givens and
Lindsey Richardson

Planning for a Large Inventory Project

- The Museum's CMP requires wall-to-wall inventory every 10 years; last one completed in 2006

- POLL: How many of you have an inventory coming up? How many of you have CMPs that require a regular inventory?

- Grant-funding was vital
- Proposal to IMLS was based on timed-trials, estimates on the size of the collection, and a wish-list that included processing backlog collections and gaining intellectual control over the entire collection
- We got the grant! Then it began….with the goal to finish a wall-to-wall inventory between October 1st, 2016 and September 30, 2019

Getting Started

- Hiring:
  - Write position descriptions
  - Interview and hire Inventory Technicians

- Reconfiguring workspaces
  - Clean up and organize workspaces
  - Purchase laptops, Ergotron sit-stand desks, and other supplies

- Paperwork
  - Create Inventory Standards and Procedures Document
  - Create project-specific template in database
  - Forms
  - Prep inventory locations by printing previous inventory lists

Adjustable ergonomic desks made by Ergotron, used by medical professionals, we purchased them on Amazon and Ebay

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All photos taken by TSFM Collections team, 2016 - 2019

The Inventory Team

Curator of Collections: Lindsey Richardson

Collections & Exhibits Manager: Stephanie Allen-Givens

Collections Cataloger: Jan Masterson

Inventory Technicians:

Jennifer Browder Schmidt

Anne Hanisch

Chue Thao

Photo taken by TSFM Collections team, 2019

Basic Operating Procedures (first 2 years)

- Inventory Techs became inventory experts, taking notes on the Inventory Cover Sheet for every location & in the database
- Created/edited individual records as needed
- Updated all tracking sheets for anything beyond the ordinary: Needs Conservation, Curatorial Interest, FIC, Proposed for Deaccession, Needs Rehousing, etc.
- Signed off on and dated database record when inventory complete; mark storage location when complete
- Records were spot-checked by the Collections and Exhibits Manager
- Weekly meetings for reporting and trouble-shooting, as well as celebrating benchmarks
- Reporting to all levels, including Department, Directors, the Board, and IMLS

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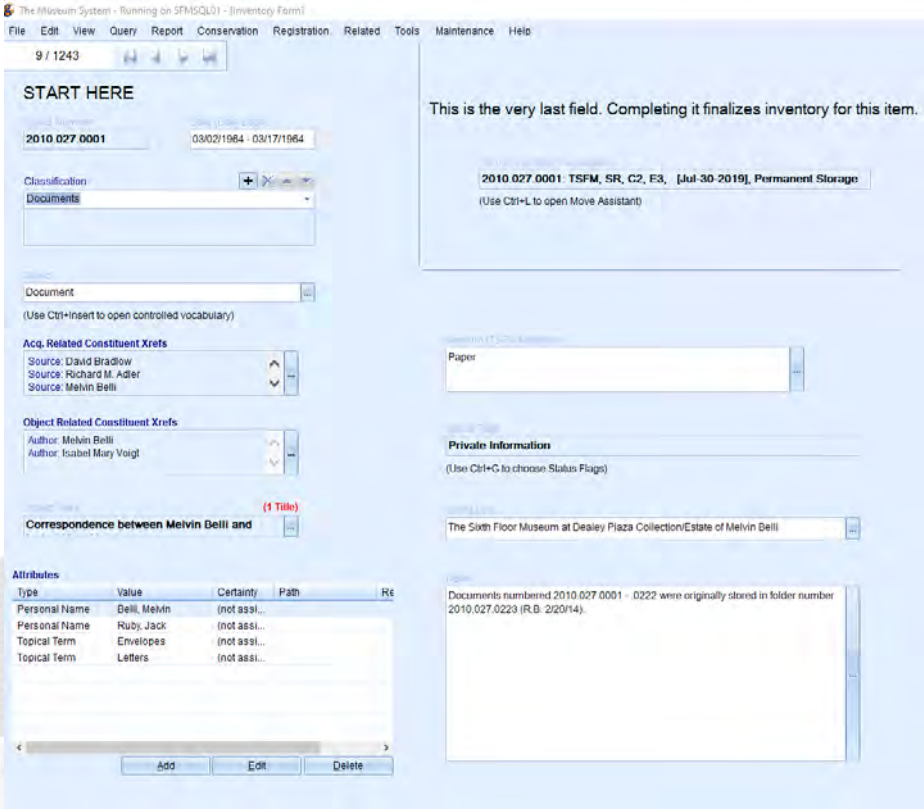
All photos taken by TSFM Collections team, 2016 - 2019

Data Collected

Capture a minimum data-set in TMS per item consisting of:

- Item number
- Storage location
- Classification and Object fields (e.g. Document and Letter)
- Date, Title and Credit Line fields
- Constituents (e.g. object related constituents like author or photographer and acquisition-related constituents like donor)
- Search terms (all relevant tags needed to improve searchability)
- Condition (brief notes on condition; items requiring attention would be photographed and their records would have a “Needs Conservation” status flag attached)
- Recording date of physical inventory and identity of the inventory-taker



Inventory Form for Years 1 and 2 in TMS

Project-Related Forms

INVENTORY COVER SHEET

Location: _____

Date Completed: _____

Name of Inventory Tech: _____

Number of Items Found: _____ Number of Items Moved: _____

Number of Items Missing: _____ Number of Items Need Conservation: _____

Number of FIC Objects: _____ Number of Items for Deaccession: _____

Notes:

INVENTORY COMPLETE

☐ 2017 ☐ 2018 ☐ 2019

DO NOT ADD ITEMS TO SHELF!

INVENTORY COMPLETE

☐ 2017 ☐ 2018 ☐ 2019

DO NOT ADD ITEMS TO SHELF!

Item Problem Slip

Object #_____

- ☐ Needs Accession Number Assigned
- ☐ Needs Object Number Assigned
- ☐ Needs Label
- ☐ Needs to be Rehoused
- ☐ Needs Conservation
- ☐ Needs to be Deaccessioned
- ☐ Object is Missing
- ☐ FIC Object
- ☐ Needs High Resolution Photo
- ☐ Other _____

Item Problem Slip

Object #_____

- ☐ Needs Accession Number Assigned
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- ☐ Needs to be Deaccessioned
- ☐ Object is Missing
- ☐ FIC Object
- ☐ Needs High Resolution Photo
- ☐ Other _____

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Examples of forms, developed by TSFM Collections team, for Inventory Project

Project-Related Tracking Sheets

- Curatorial Interest Collections
- Deaccessions and Disposals
- Duplicates (Specific to newspapers and magazines)
- FIC Objects and IA Objects
- Missing Objects
- Objects Needing Conservation
- Objects Needing Rehousing
- Objects To-Be Digitized
- Objects with No Current Location
- Post-Inventory Tasks
- TMS Clean-Up Needed

Collection Number	Collection Name	Location	Object type/description	Counted
1989.129	TSFM Collection	C7, FC5, D2, F1	Commomorative stamps from around the world in honor of John F. Kennedy; (per previous TMS notes) originally housed as a set in a frame and used as part of permanent exhibit; stamps removed from exhibit floor and housed individually	CT 07/02/2019
1995.012	Julia Knecht Collection	Multiple	Please see text entries in TMS or Inventory Project Summary Worksheets in Inventory binders for specifics	Multiple
1996.006	Phil Willis Collection	C7, FC9, D1	"Rush to Judgement" films, Part 1 and Part 2 (films, reels, and canisters)	CT 07/03/2019
1996.014	George Reid Collection	C7, FC5, D1	1 document written in Braille [used at historical marker] detailing the assassination of President Kennedy, correspondence between Marguerite Oswald and George Reid	CT 07/02/2019
2005.010	Dallas County Sheriff's Department Collection	C3, E3	Photocopies of letters from Ruby to his nieces, signed "Uncle Jack". Original incident reports of Ruby in County jail (head-butting wall incident / attempted electrocution / cut shaving).	JB 07/09/2019
2007.021	Ed and Ina King Collection	C2, D3 (moved to C1, A7 on 7/30/2019 by SA-G)	Interview with Nicola Longford from The Dallas Morning News, 01/07/2007 (supplemental insert)	CT 07/12/2019
2010.027	TSFM Collection/Estate of Melvin Belli	C2, E1 (moved to C2, E6 on 7/30/2019 by SA-G)	Curatorial Interest (6) - Handwritten letter from Hyman Rubenstein to Tonahill about "Brother Jack" and Letter to Belli from Stanley Marcus with Neimen Marcus. There is also correspodence between Belli and Jim Garrison and well as between Belli and Earl Warren of the Warren Commission. Curatorial Interest (3) - Handwritten letter to Belli from Jack Ruby in January 1964, a copy of the Amicus Curiae brief by Belli with a letter to Judge Brown from Belli stapled to the front inside cover, and Belli's Press Club of Dallas card.	SA-G 07/08/2019
2011.022	Valley Forge Flag Co. Collection	C1, D4	Piece of correspondence referencing the American flag that was buried with President Kennedy's casket	CT 07/10/2019

Snapshot from Curatorial Interest Tracking Sheet in Excel

Snapshot of Post-Inventory Tasks in Microsoft Planner

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At Work

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All photos taken by TSFM Collections team, 2016 - 2019

Routine Activities

- Weekly Team Meetings
- Weekly (or as needed) Q&A sessions with Curators and Director of Collections & Interpretation
- Monthly reporting on time, money, and progress to Directors and Board Members
- Financial tracking (of purchases, hours, requests to IMLS for reimbursement, records of payment, etc.)
- Benchmark celebrations
- Deaccession process

Photo taken by TSFM Collections team, 2016 - 2019

Deaccessions

- Board training on deaccessioning process
- Development of deaccession lists
- Batch processing of deaccessioning

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All photos taken by TSFM Collections team, 2016 - 2019

Inventory at Off-Site Locations

- POLL: How many of you have collections to inventory at more than one location?
- Modified routines – how to “go mobile” with your inventory

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All photos taken by TSFM Collections team, 2019

Nothing Ever Goes As Planned

Pivot!

- At the end of 2 years we had inventoried approximately 30,000 items, with at least 50,000 estimated still to go
- The Directors wanted the project done on time – extending the deadline was not going to be an option
- How could we possibly finish?
- Completely changed procedures to fit the final 12 months of the project
- Goals of original IMLS proposal would still be met, but in a very different way

Photo taken by TSFM Collections team, 2016 - 2019

New Procedures

- Shifted focus from object-level records to collection-level records
- Developed a way to identify priorities for inventory
  Stoplight approach:
  - Green = Fully processed
  - Yellow = Partially processed
  - Red = Completely unprocessed
- Wanted to continue to evaluate collections for physical condition, curatorial priorities, deaccession needs, etc.
- Hired third full-time Inventory Technician: Chue Thao
- Devoted more time to project for full-time staff

SECOND COUNT

Inventory Project Summary Worksheet Location: _____ Date: _____ Name: _____

Collection/ Object Number	Collection Name	Notes	Flag for issues (Accessioned Element - Processed Re-Deaccession / Inventoried)	Object Count (Physical Number)

Total Object Count (Second Count): _____

Snapshot of Inventory Project Summary Worksheet used in Year 3

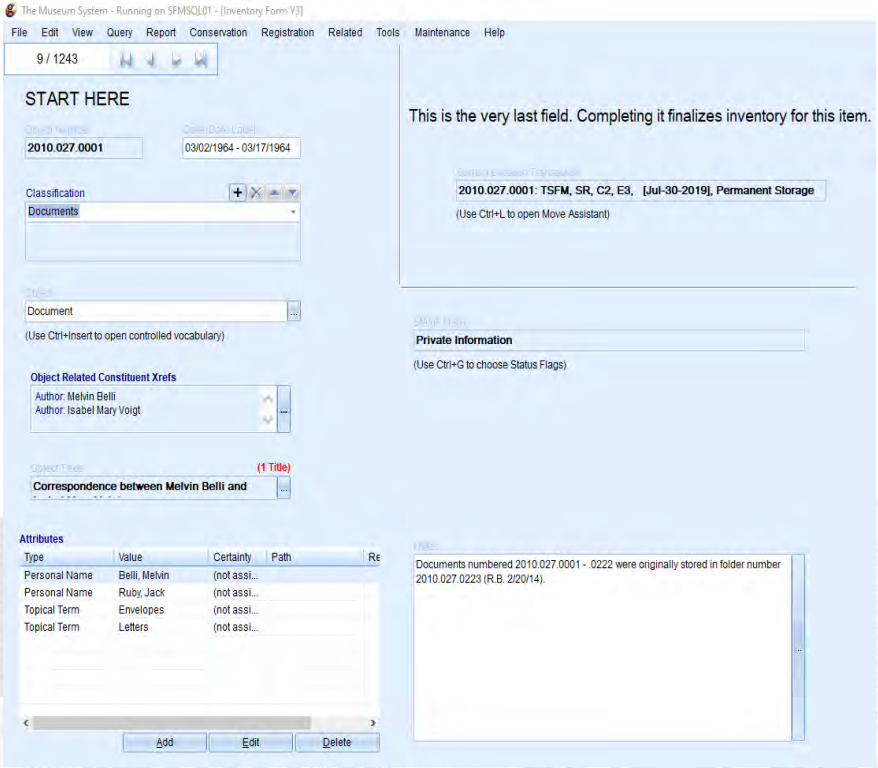
New Structure:

- Phase 1: Physical Count & Assign Stoplight Color for each collection
- Phase 2: Start processing Green collections with minimum data collected (overlap with Phase 1 off-site)
- Phase 3: Continue processing all the Yellow and a few Red collections (overlap between Phase 2 and 3)
- Phase 4: Second Physical Count
  and Wrap-Up – updated all remaining collection-level records

Minimal Data Collection

Streamlined Data Collection to the following Fields in database:

- Date
- Title
- Constituents (only primary ones)
- Search terms (only primary ones)
- Storage Location
- Classification
- Object
- Inventory complete/date/handler



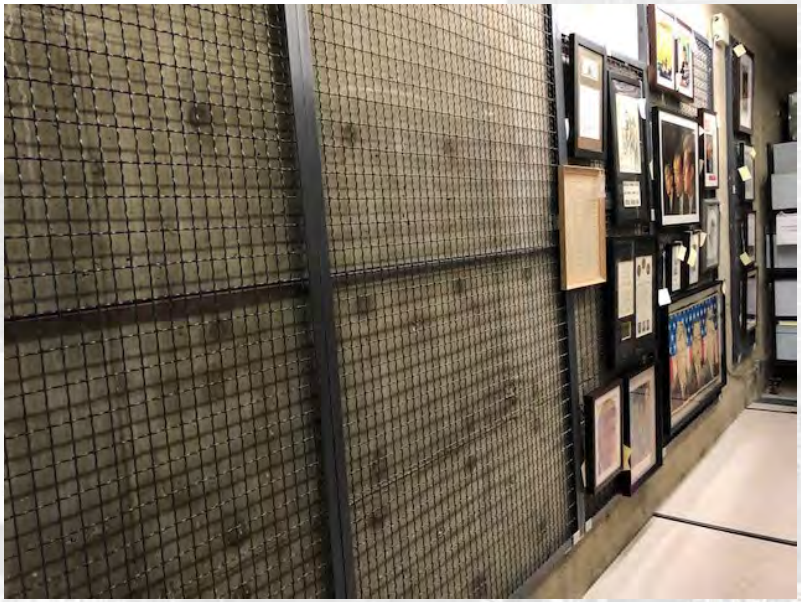
Snapshot of streamlined Year 3 Inventory form in TMS

Changes & Distractions

During Phase 2-3, we experienced several changes in our storage space:

- Acquired new hanging art rack
- Acquired some new shelves

Both resulted in serious shuffling of boxes and objects both physically and in TMS. This messed up many of our storage location addresses and required ENORMOUS database clean-up!



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All photos taken by TSFM Collections team, 2019

Project Complete

- Conducted second count of remaining collections
- Finalized notes and data reconciliation
- Last batch of deaccessions
- Finished reconciling FICs
- Following up on all unanswered emails and questions
- Creating to-do lists
- Finalized reports

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All photos taken by TSFM Collections team, 2016 - 2019

Final Numbers

- Total objects inventoried in Years 1 and 2: 28,718
- Total objects inventoried in Year 3: 22,842
- Total objects counted in Year 3: 62,003
- Total objects inventoried or counted: **104,940 (more than double original estimate!)**
- Approximately 20,000 objects were rehoused in archival storage
- 5,320 objects were deaccessioned
- 381 objects were identified and processed as FICs (128 objects were additionally originally identified as FICs but were subsequently reconciled)
- 280 new acquisitions, amounting to a total of 3,123 objects, were added and inventoried as they were acquired during the course of the project
- Approximately 14,000 new records were added to TMS

What’s Next?

Post-Inventory To-Do List:

- Disposal of remaining items that were approved by the board for deaccession
- Develop short-term and long-term priorities for continuing to process unprocessed “Red” collections
- Tackle leftover tasks such as rehousing work and research on remaining FICs
- Reevaluation of collecting priorities when it comes to newspapers and magazines, particularly unassociated clippings
- Training of Museum staff on how searches in TMS have changed or become more efficient thanks to the work of the inventory project
- All new accessions are to be processed within the same calendar year of acquisition to avoid future backlog
- ID photos are to be taken of all incoming new accessions at the time of acquisition to avoid disassociation of information

Fun Times

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All photos taken by TSFM Collections team, 2016 - 2019

Lessons Learned

- Data matters! Start with counts and timed trials, not estimates
- Inventories should be planned based on physical parameters and limitations (not collections type)
- Reporting matters
- Collections backlog of accessions, cataloging, or data-entry are best treated as their own projects (not part of an inventory)
- Inventory is a great time to analyze scope of collecting and deaccessions
- This type of project often results in new procedures in collections department and might require revisions to the CMP

Photos taken by TSFM Collections team, 2016 - 2019

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Thank you!

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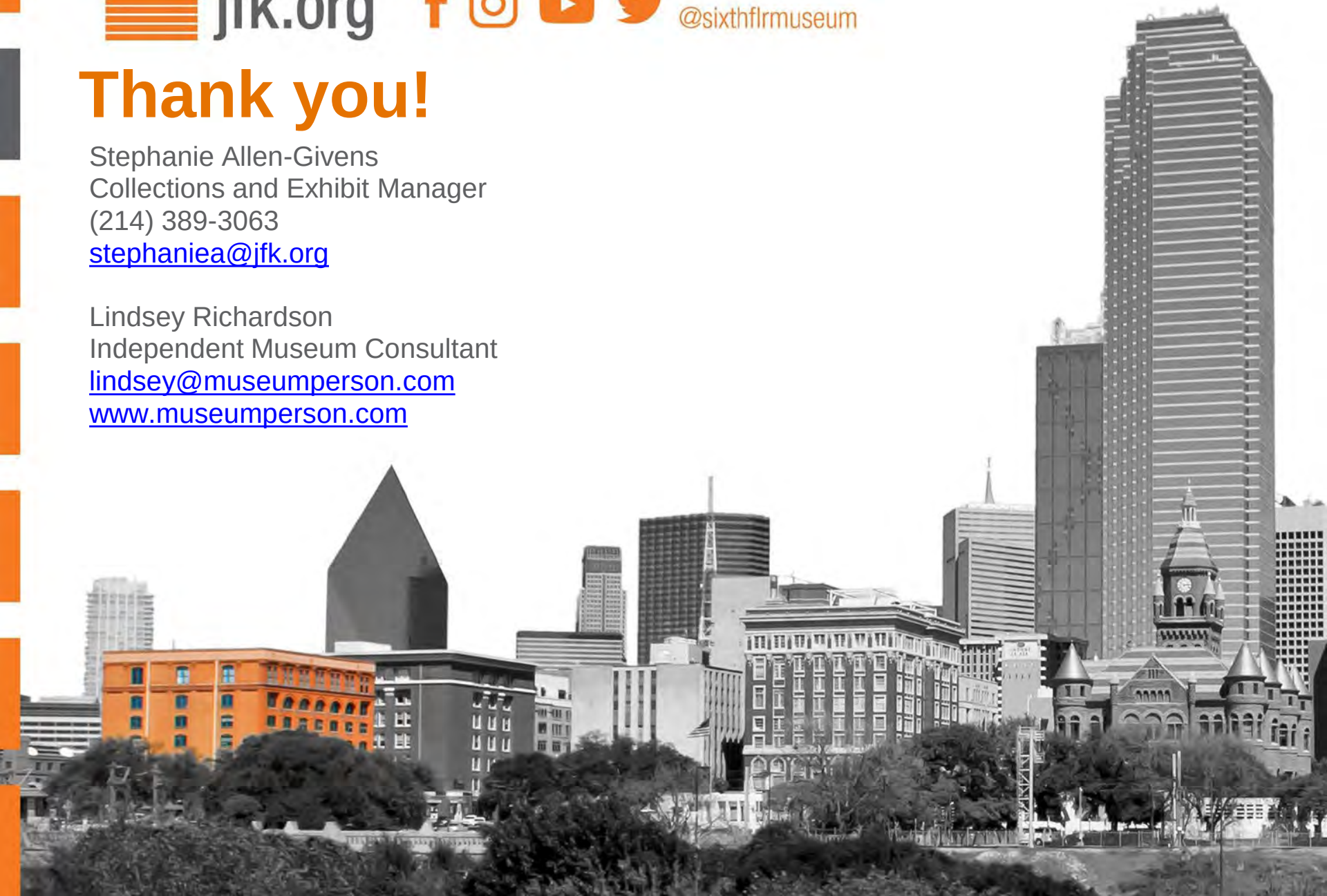
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