

**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):			
<b>Furniture:</b>	<b>Containers:</b>	<b>Container/Item Sizes:</b>	
shelves (open/closed)	boxes (record/document/print/phased/box)	letter	
drawers (vertical/flat)	folders/envelopes (group/individual)	legal	
racks (vertical/horizontal/roll)	enclosures (plastic/paper/mats)	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? (resources = policy, environmental control & space, storage furniture & supplies, staff, training, time & funds) Yes\_\_\_ No\_\_\_

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.