Manage Collections Together

Use a small pilot collection to agree how your team records information, makes decisions and prepares material for future use.

LEARNING OBJECTIVES

1. Define the pilot collection and team roles.
2. Use consistent identifiers and record fields.
3. Record access limits and unresolved questions.
4. Test the process on ten records.

STARTER ACTIVITY

1. Choose ten records and define the pilot purpose.
2. Agree identifiers, required fields, roles and storage locations.
3. Describe the records; ask another team member to check them.
4. List unresolved issues, resources and a review date.

RESOURCE CATEGORIES

DOCUMENT

Description Fields - reference, title, type, date, source and location.

ORGANIZE

Collection Pilot Plan - complete the next worksheet together.

PRESERVE

Priority Log - note condition, copies and specialist needs.

RECORD HISTORIES

Interview Brief - subjects, languages, contributors and review.

SHARE RESPONSIBLY

Access Review - authority, uses, restrictions and reviewer.

DOWNLOAD TEMPLATES / Future releases: collection inventory, digitization plan, role sheet, review log and training brief.