

# JOAN MITCHELL FOUNDATION



## **CALL** CREATING A LIVING LEGACY

Career Documentation for the Visual Artist

A LEGACY PLANNING WORKBOOK & RESOURCE GUIDE

IN MEMORY OF

**DAN BERGMAN**

Artist and Emeritus Joan Mitchell Foundation Board Member

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Artist, Curator, Art Historian, and Contributor to

*Estate Planning for Visual Artists: A Workbook for Attorneys & Executors*

*Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide*  
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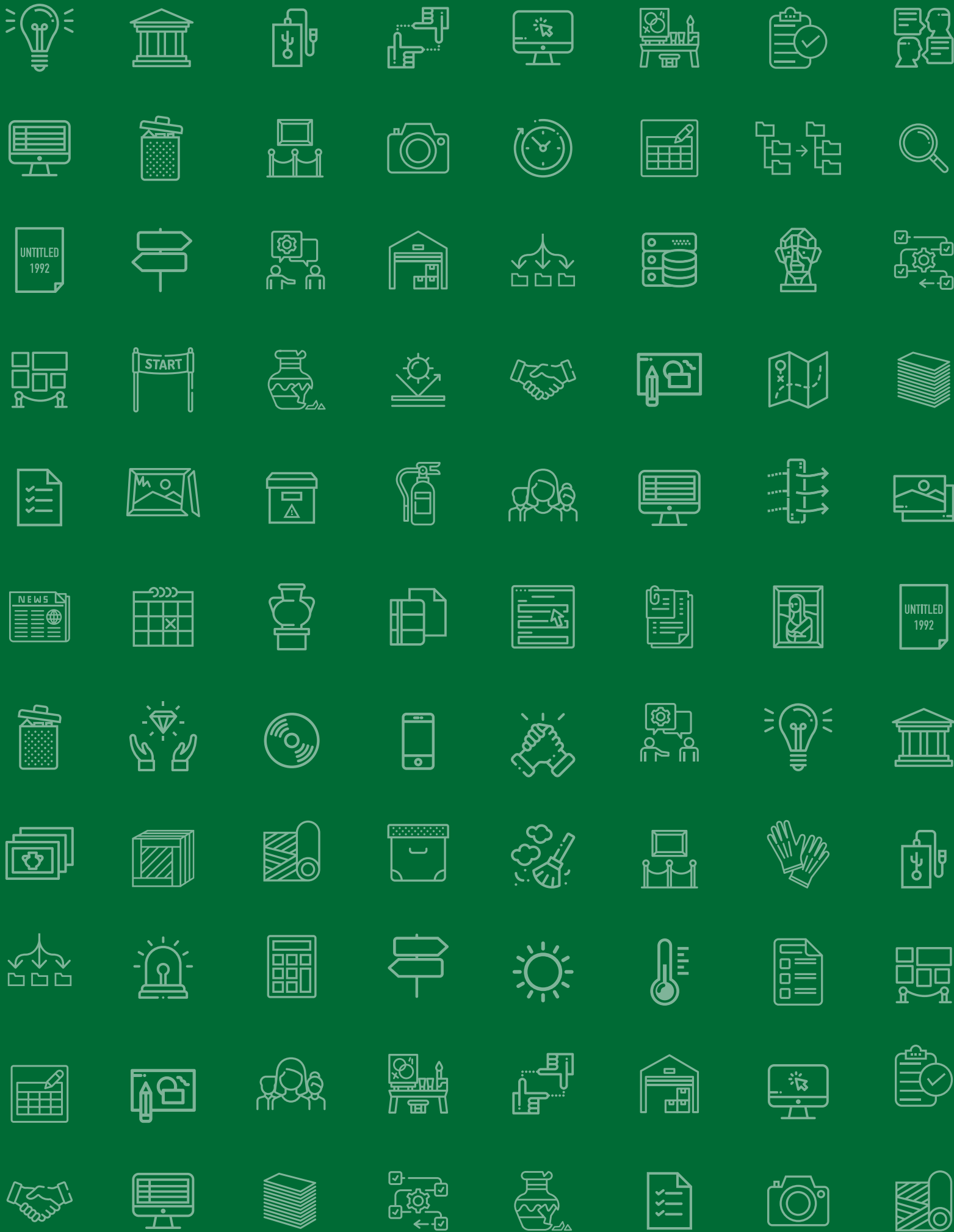
The Joan Mitchell Foundation cultivates the study and appreciation of artist Joan Mitchell's life and work, while fulfilling her wish to provide resources and opportunities for visual artists. Through its work, the Foundation affirms and amplifies artists' essential contributions to society.

ISBN 979-8-9861173-3-1

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Cover image: Artist Maia Cruz Palileo. Photograph © Reginald Eldridge, Jr., 2018.

Maia Cruz Palileo is a multidisciplinary, Brooklyn-based artist, and a recipient of the Joan Mitchell Foundation Painters & Sculptors Grant (2018), Joan Mitchell Center Residency (2015), and MFA Grant (2008), in addition to working as a legacy specialist in the CALL program.



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# Welcome

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On behalf of the Joan Mitchell Foundation's staff and board of directors, I'm pleased to present the Foundation's newest Guide: *Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide*.

For more than a decade, the Foundation has worked closely with artists, arts professionals, and legal experts to develop the career documentation, inventory management, and legacy planning tools that are now available to the public through the Creating a Living Legacy (CALL) initiative. We remain deeply committed to providing artists with the resources they need to honor and preserve a lifetime of work.

This publication—a full rewrite of our previous Career Documentation Guide, which was originally released in 2012—reaches beyond our own fieldwork to feature a range of professional voices in the artist legacy and archiving field. The decision to develop this new publication was a response to the growing interest and need for career documentation and legacy planning tools that specifically address the concerns of visual artists. With the advancement of technology and range of perspectives expanding the conversation around artists' legacies, we recognized that it was time to refresh the content in the existing publication and release a new version.

Through the CALL initiative, we aim to motivate the field to actively and innovatively support artist legacy planning, particularly for groups that would benefit from greater historical recognition, including Black, Indigenous, Latinx, Asian, LGBTQ+, disabled, and women artists. We will continue to advocate for increased investment in artist legacy planning and stewardship, working to ensure a diversity of artist perspectives in future history. We understand that making this vision a reality requires developing and engaging with an expanding network, and we encourage each of you to reach out to us and share resources with others to increase the dialogue around the importance of this work.

We hope this Guide proves valuable to your own efforts, and we welcome your feedback.

Sincerely,

Christa Blatchford  
Executive Director, Joan Mitchell Foundation

# Editor's Note: How to Use This Guide

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Our priority for *Career Documentation for the Visual Artist: A Legacy Planning Workbook & Resource Guide* is to continue to keep the well-being of visual artists and their creative output at the center. The aim is to publish a comprehensive and dynamic tool that respectfully acknowledges and takes into account the multiplicity and nonlinearity of an artist's life, work, and career.

In this new Guide, we approach career documentation as a collective endeavor. We wanted to incorporate the rich perspectives of many different authors to help us build upon and expand the previous Guide's content areas with more depth and breadth. It was important to us that we engaged our readers with a welcoming and supportive tone. We believe the quality, level of attention, and range of valuable information shared by each contributor transformed this publication into an act of community care and generosity.

## Defining the “What” and the “Why”

The Guide opens with artist Paul Mpagi Sepuya's essay “[Framing Your Legacy](#),” on page 9, focused on affirming our own stories through career documentation. To help us envision the possibilities of crafting a long-term plan for our own artistic legacy, Sepuya reflects on his own career documentation journey. He offers insights into the ways we might use this Guide as a tool to take stock of our physical and digital assets while establishing more intellectual control of our artistic legacy.

## The “How”

Chapters 2 through 4 guide readers through the career documentation process with very practical, task-oriented how-tos. To begin, you will brainstorm about how to prioritize your goals in [Chapter 2, “Beginning the Career Documentation Process: Setting Priorities and Goals,”](#) on page 15, with artist Rose Candela, and consider ways to manage your expectations and the pacing of the process with artist Catherine Czacki. You'll then receive guidance on how to assemble a team and organize your goals into a work plan in [Chapter 3, “Creating a Support System and Work Plan,”](#) on page 25, with artist Antonia A. Perez. Perez shows us how we can break down a goal into manageable steps and tasks that can be executed over time by you and/or your team.

In [Chapter 4, “Budgeting for Your Inventory Practice,”](#) on page 39, money management expert, Elaine Grogan Luttrull reminds us that planning for our legacy also involves budgeting for it. Grogan Luttrull encourages us to be strategic and take the time to understand the full scope of the career documentation process and what financial decisions need to be made before entering into any work agreements. Having a plan and a budget in place helps us to navigate common barriers we may encounter throughout the process. It will also equip us with the information and tools to apply the suggestions offered in “[Expert Opinion: The Significance of a Contract or an Agreement](#),” on page 147, by attorneys Jim Grace and Luke Blackadar on entering work agreements and drafting contracts.

## Return to the “What” and “Why”

You'll be encouraged at many points throughout the Guide to return to your “What” and your “Why”—reminding yourself of the purpose of this career documentation process, and why it is important. In [Chapter 5, “Taking Stock and Mapping Your Archival Legacy,”](#) on page 57, archivist Steven G. Fullwood helps us to see the patterns in our existing workflow that we can translate into organizational routines, enabling our studios to run more efficiently.

## Back to “How”

In Chapters 6 through 9 we receive a series of comprehensive, step-by-step instructions on how our physical organizational routines inform and strengthen the types of studio management systems we aim to build and maintain over time. Archivist Virginia Allison-Reinhardt provides us with a detailed architectural framework for the fabrication of a physical and digital inventory management system in [Chapter 6, “Creating an Artwork Inventory,” on page 69](#), and [Chapter 7, “Managing Your Digital Image Assets,” on page 89](#). This is followed by art writer Sharon Mizota, who, in [Chapter 8, “How to Create Your Bibliography,” on page 101](#), instructs us on how to create a bibliography that offers researchers insightful information about our artistic production and that situates our work within a larger cultural context.

As you track and gather the scholarship being developed around you and your work, conservation specialist LaStarsha McGarity encourages you to also define and communicate your artistic intentions for your work in [Chapter 9, “Drafting a Preservation Plan,” on page 107](#). Through a concise list of safekeeping strategies, McGarity helps us incorporate the vision we have for our work into a preservation plan that will present the most accurate account of our artistic production.

## Finally, Reflect On and Frame Your Legacy

In Chapters 10 and 11, we’re asked to reflect on our story, frame it, and then make it accessible for future generations. Voices in Contemporary Art Program Director Margaret Graham walks us through ways we might approach chronicling our artistic practice, shaping it into a concise narrative for the record in [Chapter 10, “Capturing Your Career Map and Timeline,” on page 129](#). In [Chapter 11, “Conclusion,” on page 141](#), community archivist and writer Jennifer Patiño and curator and writer Tempestt Hazel remind us that career documentation is in fact a community service—an expression of collective care and of the shared belief in the future’s potential that we would prepare it with the necessary tools and stories from the past.

## A Note about Terms

Borrowing from Steven G. Fullwood, I wanted to foreground some critical terms used in this Guide:

- » A **collection** is a set of archival contents or (more commonly) materials assembled by a person, organization, or repository from a variety of sources.
- » An **archive** or **archives** is a collection of physical or digital ephemera of all sorts that is historic and static. Archival objects (letters, sales invoices, exhibition pamphlets, etc.) are saved purposefully because they provide historic evidence.
- » An **inventory** is a listing of your artwork. It is not considered part of the archive because its status is very much subject to change—artwork can be sold or given away and no longer a part of an artist’s collection.

It is our hope that this Guide will succeed in informing and preparing all who choose to engage with it to actively position themselves and their artistic legacies in the future.

Shervone Neckles-Ortiz  
Artist Programs Manager, Professional Development  
Joan Mitchell Foundation



Artist, professor, and former arts administrator Paul Mpagi Sepuya is based in Los Angeles and is an associate professor in media at the University of California San Diego. For more than ten years he worked on professional development programming and funding opportunities for artists with Creative Capital, the Joan Mitchell Foundation, and other organizations. In 2007, he helped to launch and direct the Joan Mitchell Foundation's Creating a Lasting Legacy (CALL) program. In this introduction, he reflects on his own process for establishing a long-term plan for his artistic legacy, including insights from his work as an independent archive consultant.

Paul Mpagi Sepuya, *Drop Scene* (OX5A3572), 2019. Archival pigment print, 40 x 60 inches (101.6 x 152.4 cm). Image courtesy of the artist, DOCUMENT, Chicago, and Los Angeles.



# Framing Your Legacy

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BY PAUL MPAGI SEPUYA

This Career Documentation Guide is a great resource, no matter where you are in the legacy planning process. If you're like me, you spend a lot of time worrying about the big picture, getting overwhelmed by the idea of breaking down the documentation process into manageable tasks. Perhaps you just don't know what questions to ask. Or where to even begin. Think of this Guide as a user-friendly tool that offers you multiple entry points, as well as something you can turn to, set aside, and pick up again, as needed.

The information compiled in this Guide draws on case studies from an esteemed group of industry professionals working collaboratively with the Joan Mitchell Foundation to bridge sectors and build unique artist-centered resources. The creators of this Career Documentation Guide hope that you will find it to be a useful tool as you shape the form and function of your archive, making the steps more approachable and manageable in your legacy planning process.

## **I invite you to consider these enduring thoughts...**

Each stakeholder in your work has their own perspective on it. Your family, galleries, other commercial interests, students, scholars and researchers... each brings their own agenda, but the most important agenda is your own. You can help shape and guide the story you want to tell by maintaining your own records; having them set up in a way that really makes sense to you as an artist, based on how you see your work. Whether your records are organized by body of work, by timeline, by subject or related project, or by the communities you're associated with or identify with, if you spend the time intentionally laying that groundwork, then your voice in the work will also be in the record.

When it comes to shaping the form and function of your archive, the form should reflect how you organize and think about your work. For example, when I assisted a painter with her inventory

system, I was anticipating organizing works according to content or chronology; but for her, an oil painting was completely different from a watercolor or a work done in graphite, even if it was made at the same time and took the same subject. She thought about the work based on medium, and the story she was telling was about how she progressed in each medium, so that was her starting point. When it came to her legacy, that's what she wanted people to know, and imposing my form wouldn't have worked. Figuring out the form for your archive is crucial because that's where your voice lives.

The function of your archive comes down to what you need from your record-keeping system or your storage on a day-to-day basis. When I assisted another artist who was having a survey retrospective, I saw that the archive's function was for the curator and curatorial assistants to quickly get an overview of the histories of works. You might approach the function by identifying what information you need to get out of the record-keeping system, and then work backwards to figure out what is missing and needs to be put in.

For myself, as a photographer, I need to be able to quickly know:

- » Where are these prints?
- » Have these editions been produced or not?
- » What is in my own inventory and/or in the gallery's inventory, or what's currently on view?
- » Where have these works been exhibited?

It's important that I capture this information in order to optimize the function of the archive.

We each have unique studio anxieties and hurdles, and there's a balance between what's important for us artists, and what might be identified as best common practices for making things traversable for others; for example, what is a curator looking for when they're wanting to do research into an artist? What is the information that will be needed; where will the interest be coming from; and how is that balanced against how each artist gets the work done?

To begin the process of organizing my own work and arts practice, I started small. I leaned on the many skills I gained as a photographer's assistant and administrator and applied that knowledge to my own practice. I used whatever resources I had at hand, which at first was as simple as a notebook; each photograph I printed would have one dedicated page where I kept track of how many editions I printed and when those editions were gifted, traded, or held onto. And, very rarely, sold! Once I was introduced to working with databases, I was able to then transfer those notebook records pretty easily into my own spreadsheets and databases.

Through my supportive roles I was able to actively witness what artists at different stages in their careers needed to advance their practices. I was in my early twenties at the time, and it was difficult for me to envision what I would need as an artist over a ten, twenty, thirty-year period. But it was helpful to see firsthand the challenges of entering the documentation process at a later stage. This exposure prompted me to establish a framework for myself, to keep track of my work even if it felt premature for me to record this information.

It took time for my career to grow in terms of exhibiting and getting work published, but I had the tools for incorporating that information when the time came. I began setting aside a little bit of time, maybe a few hours every month, to updating the information in my spreadsheets or database.

It's only in the last two years that I've hired a studio manager, which has been a game changer for my practice. I am fortunate to be in a position where I can have consistent and thorough help in managing the daily operations of my studio. When I made the hire, I already had a framework in

place for organizing my artwork and records so there was no need to build an inventory system from scratch. We used my collection of organized notes from years back to quickly locate information for records and add more comprehensive details.

For artists entering the career documentation process at a later stage, figuring out where to start or how to get support can feel daunting, and asking for help can be harder than we expect; but speaking up can create a supportive community and open up new networks of people. Organizing an entire life's work feels overwhelming, both for us as artists and for those assisting us; when approaching career documentation, you might start with what you're doing right now or key works from the past. From there you can start entering information on those works, and questions will emerge that chart the archive you're beginning to build: What inspired that work? Was it ever shown or published? What is another work people may have loved, but hasn't been shown as much? A way to begin to make those connections and build a record of information can start conversationally, and as time goes on you will develop a system.

The work of career documentation begins, but it never really ends; it just evolves and continues.

As an artist, my own process involves making connections across different bodies of work and across time, particularly because I'm making portraits and related artwork with people in my life. I am now into the third decade of that project, and having an organized record-keeping system has allowed me to find deeper connections and resonances across bodies of work. Inventorying has also helped me when I needed to write an artist statement, for something as simple as having image files readily available, or as complex as getting an overview of a group of artworks in a project.

There are a lot of opportunities that I would have missed without a record-keeping system. Years ago, I was able to publish a book through a gallery, and that opportunity only came through because I was the one artist working with them that already had files organized and ready to go. Sometimes it's not about the work, it's more about who's the most prepared and ready to meet the opportunity that really makes the difference. An artist I met years ago that I've kept in touch with shared their frustration with losing opportunities for shows because they were essentially starting from scratch in tracking down works and other materials each time they were contacted for an opportunity. And then there are certain goals that may be more easily facilitated by having a head start on documentation. In thinking about our legacy after we pass, if we can and want to donate personal papers or works for preservation by an institution, having begun to organize our records allows the institution or organization to engage with it and really see what's there, and can serve as a roadmap to continue the process that we began. This is all with the goal of continuing to make your work accessible to future generations.

Through organizing and mapping your own practice, you may feel a sense of personal validation, and gain an understanding of the bigger picture behind your work. A lot happens with us as artists when we start to intentionally track and document our practices. As artists we often feel we constantly need to be making new work and that there's not enough time for reflection. Sometimes I look back and ask myself, "Why am I so anxious? I've already made all of this work." Over the years I've discovered that there's magic to be found in the things that you put aside; or that inspiration comes through the more prosaic functional needs of organizing negatives and image files.

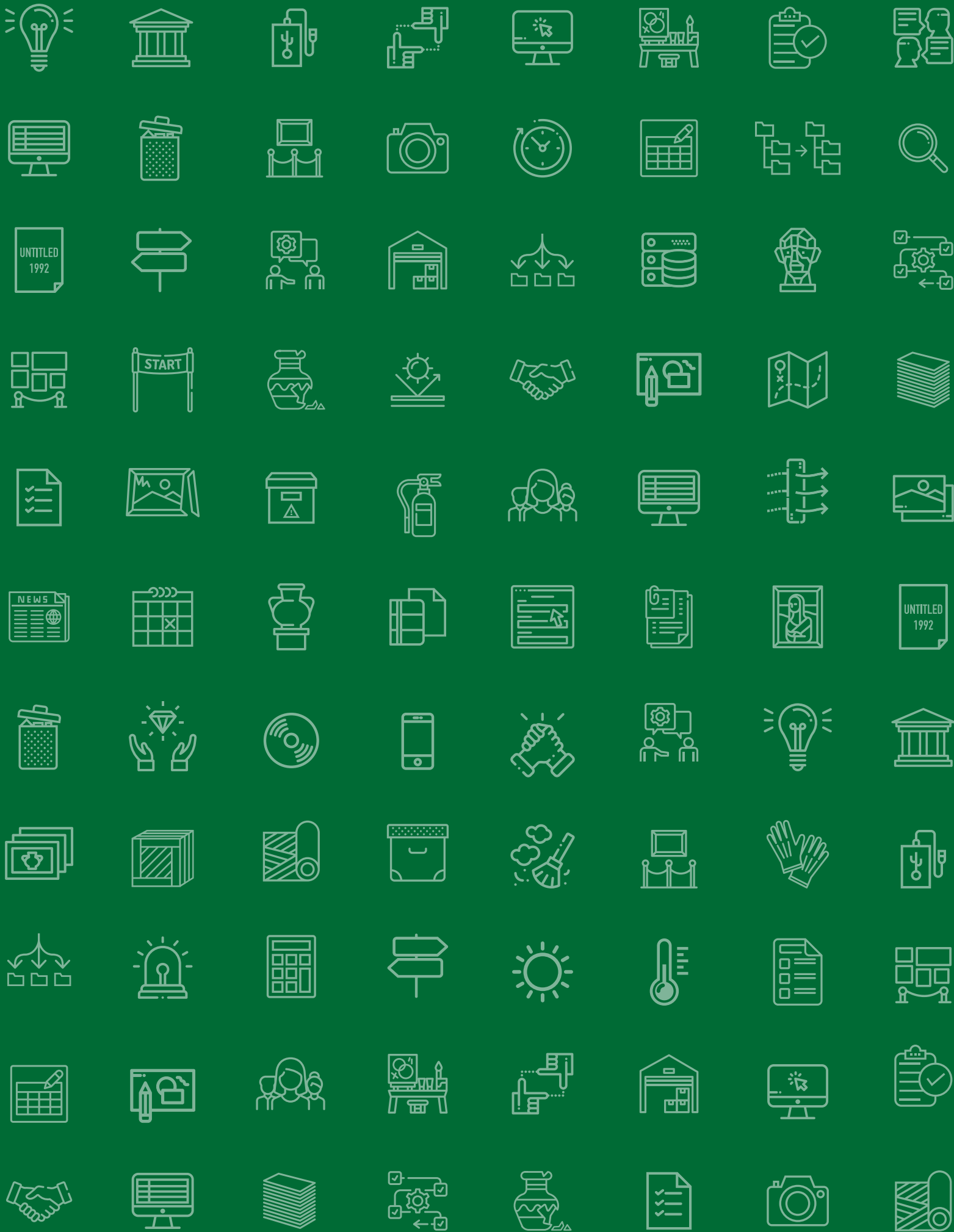
Inventorying can also be scary, returning to those moments we've all had when we weren't making much work at all. That anxiety of not making work came up for me during the first year of the COVID-19 pandemic. There have been periods in which I've experienced creative blocks or paralysis, and having a framework for record-keeping already set up helped me reconnect to my motivations for making work.

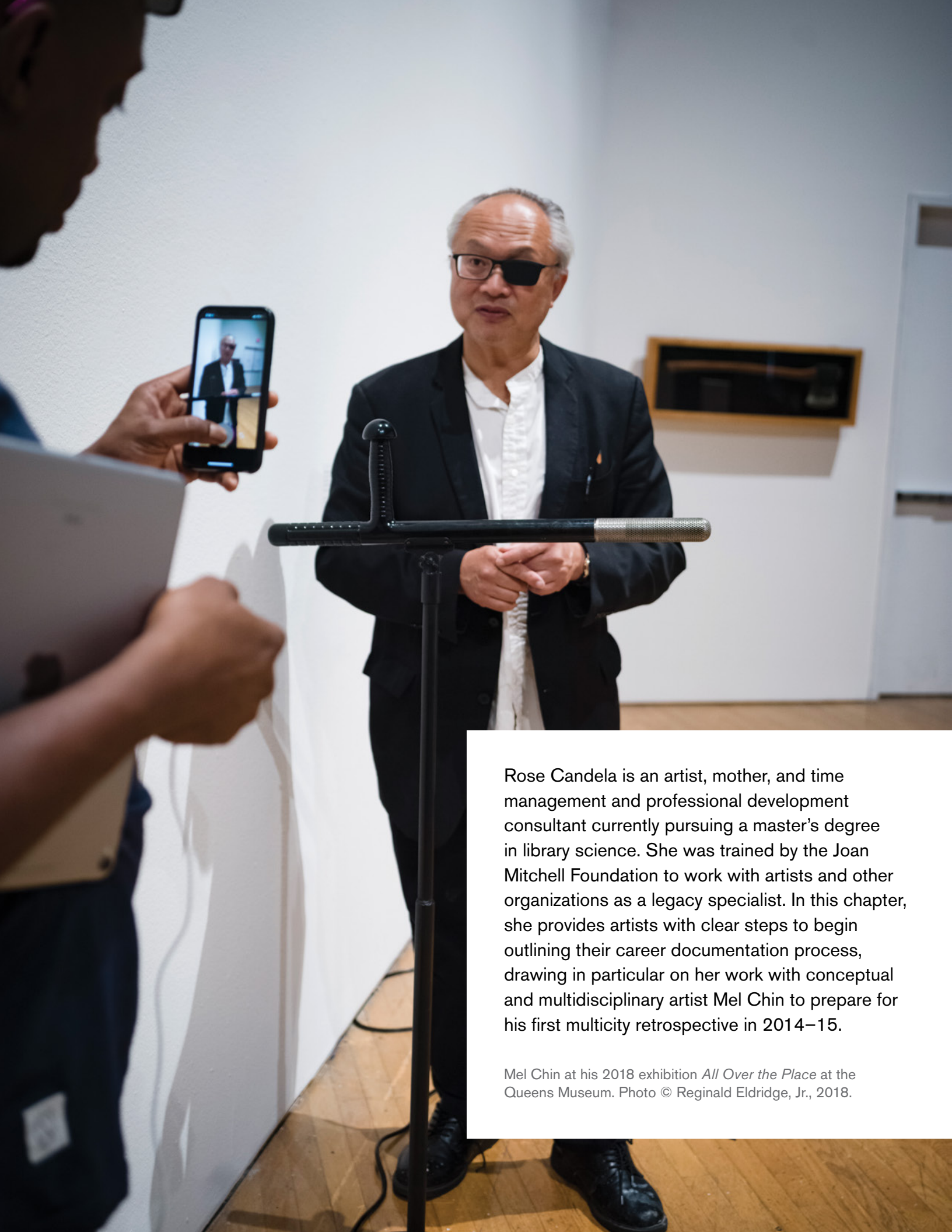
I spent all of Fall 2020 organizing things that had been kept in milk crates and boxes in a New York storage unit; I knew what to do with them, I just hadn't had the will and the time and assistance to do it sooner. Spending a few months during that creative break going back through that material was daunting but worth every minute. Reorganizing old prints by chronology and subject and looking through records of projects that I had started but not finished motivated me to get back to making new work a few months later. It also helped me brainstorm ideas to show older, never-before-seen works for upcoming exhibition opportunities.

The career documentation process has also been a way to build stability and consistency. When the form and the function of an artist's archive is in alignment the records become an extension of the creative process.

An archive is creative, it's functional, and it's looking to the future.







Rose Candela is an artist, mother, and time management and professional development consultant currently pursuing a master's degree in library science. She was trained by the Joan Mitchell Foundation to work with artists and other organizations as a legacy specialist. In this chapter, she provides artists with clear steps to begin outlining their career documentation process, drawing in particular on her work with conceptual and multidisciplinary artist Mel Chin to prepare for his first multicity retrospective in 2014–15.

Mel Chin at his 2018 exhibition *All Over the Place* at the Queens Museum. Photo © Reginald Eldridge, Jr., 2018.

# Beginning the Career Documentation Process: Setting Priorities and Goals

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BY ROSE CANDELA

As you begin inventorying, be sure to be honest about your style of organization, what you'd like to change, and what you want to keep consistent with how you've structured your work. Take the following tips as starting points to plan, put into action, and refine your inventorying process as you go.

## Getting Clear on Priorities

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### Start with “Why”

Why do you want to inventory and organize your work? The answer may be simple: you may be planning an exhibition and you need to be able to access your images and information for curators or for the press. Perhaps you're preparing for an upcoming presentation chronicling your career or you have completed bodies of work you'd like to inventory. Whatever your motivation, write it down as you begin—this motivation will be your anchor if you feel overwhelmed or stuck as you inventory.

### Make Time

There's no way around this—you're going to need time to inventory your work. Look at your calendar and select a time when you don't have any major deadlines, schedule in this project, and then protect that time moving forward. Often goals feel unmanageable because there isn't enough time to do them. Taking ownership and building in time will allow for inventorying to be a sustainable practice in your life.

## Create a System Based on How You Remember

A lot of people remember events or locations where items are stored differently, using visual memory, chronological memory, physical or spatial memory. The most effective ways you remember can provide the framework for your inventory.

For instance, you may label your files using the location they were created and/or exhibited (for instance, Houston, Menil Collection). If you remember chronologically, you'll want to label your files by month and year. Next you can decide whether your inventory will be in an extensive database system or on a spreadsheet.

The most effective inventory system is one that can be accessed by the range of people (studio assistant/gallerist/scholar) involved in supporting your artwork and studio practice, but most importantly it must serve you and your needs first. Prioritize the way you work when developing your inventory system.

**Ask yourself the following questions to jumpstart your inventorying process:**



**What is your purpose or big vision for creating an inventory system?**



**How do you envision a system to benefit you?**



**How will you use this inventory day to day?**



**What aspects of your studio practice do you want to track and document?**



**Are there aspects of your studio practice that you might want to omit or leave out from being documented?**



**What artworks must you prioritize in this process?**



**What is important to communicate about your practice?**







**What will be the function of your inventory system? And who will it serve?**



**What type of inventory or organization process has worked for you in the past?**

## Build around a Specific Area

In inventorying your work, you'll constantly be moving between four separate systems that often intersect.

			
<b>Physical</b>	<b>Narrative</b>	<b>Operational</b>	<b>Digital</b>
Organizing your artwork materials and documents, like your finished work or in-process projects.	Organizing the narratives that convey meaning in your work and career history.	Organizing your workflow and how your studio functions day-to-day.	Organizing what is in your hard drives or other virtual space, such as résumés, statements, articles and digital images.

Looking at these four areas, ask yourself which needs the most attention right now. Are you planning an exhibition and need to put together a checklist? If so, begin organizing your physical and digital information. Are you finding the clutter in your studio inhibits your ability to work? Then start organizing your operational goals to minimize further distractions.

### Questions to ask yourself in each area:

- » What do I need to purchase or procure to make this process easier?
- » How can I work with the space and tools I have to make it happen?

Make a list of your priorities based on the areas needing the most attention, in the order that makes the most sense to you. If you feel overwhelmed, remember to begin with one small step.

## Begin with the Action That Produces the Greatest Result

Now that you've looked at what area (studio organization/data management/artwork restoration) you'd like to focus on, what's one action you can take to put things in motion? Maybe it's finally labeling a few files or file boxes for your ideas, or purchasing archival storage for your photos. Perhaps it's getting a phone or audio recorder so that you can do voice recordings of the stories around your projects and personal chronology.

Start with one action that will produce the most results, today. The details will fall into place once you begin, and a feeling of accomplishment will support you to keep going.

## Inventory What Matters Most

As you begin, recognize that through the process you're creating your narrative. You don't have to inventory and catalogue everything you own or make or do. Discern what you'd like your narrative to contain. To begin, consider what has made the greatest impact on your oeuvre or exhibition history or has informed your better-known works. Starting with one project, identify what you want people to remember and know about that piece of art. Next, find that project's supporting images, documents, and writings. Work forward from there, project by project.



## Setting Manageable Goals

Before you can set manageable goals it is important to understand the difference between a short-term goal and a long-term goal. Short-term goals are goals you can accomplish within a set timeframe: a day, a month, or, in some cases, a year. A short-term goal is concrete.

For example:

- » Label images on my hard drive
- » Place paper artwork in archival storage
- » Finish résumé and press kit

Long-term goals may require more vision and can take longer to complete. Often, a series of short-term goals together make up a long-term goal.

For instance, a long-term goal could be to inventory your work from 2010 to 2020. Once you've identified this goal, you would then create a list of all of the steps (short-term goals) necessary for its completion, as in the table on the right.

You can use the “[Worksheet: Long-Term Goal Setting](#),” on page 21 of this chapter to help you identify long-term goals and divide them into short-term goals, which are then organized into a series of manageable tasks.

LONG-TERM GOAL: Inventory work from 2010 to 2020	
SHORT-TERM GOAL #1	Operational organization—draft a work plan and identify support
SHORT-TERM GOAL #2	Physical organization—locate the artwork, inspect condition of artwork and its storage
SHORT-TERM GOAL #3	Digital organization—identify and photograph artworks lacking photo documentation
SHORT-TERM GOAL #4	Physical organization—review and organize physical records of artwork
SHORT-TERM GOAL #5	Digital organization—enter information about the artwork into your inventory system
SHORT-TERM GOAL #6	Narrative organization—add artwork installation instructions to artwork record in inventory system
SHORT-TERM GOAL #7	Physical organization—procure safe storage for the artwork

## S.M.A.R.T. Goals

Generally speaking, keeping your goals specific, measurable, attainable, realistic, and timely (S.M.A.R.T.) will support their completion.

### S.M.A.R.T. Goals Are:

**Specific:** What is your core objective? Start by looking at the big picture. When I worked with Mel Chin on his career retrospective, my long-term goal, and core objective, was to create an accessible inventory of information for curators, press, and for Mel to use at any time. Within that long-term goal, a short-term digital organization goal was to compile a list of artworks—with title, medium, and date—from various existing lists, such as previous exhibition checklists. A short-term physical organization goal was to locate the artwork on the newly created list. A short-term narrative

organization goal was to determine whether the artwork in that list had installation instructions. Throughout the process, I returned to the vision of the long-term goal while completing the short-term goals. Defining and then returning to your core objective is especially useful when the task feels too large to accomplish.

**Measurable:** How will you know when you've achieved your goal? Try to envision the endpoint for this stage of the inventory process—perhaps it's the opening night of your exhibition. If you don't have a marker by which to chart the project's completion, your inventory process can seem interminable and overwhelming.

**Attainable:** Is the goal one that you can accomplish alone and with what you have, or do you need help? This is where you assess whether hiring an assistant or an archive specialist is necessary to achieving your goal. Completing an inventory can happen alone, or with the help of others. It's important to know your own capacity, and strengths and weaknesses, when setting a goal.

**Realistic:** Is this a goal you've completed by yourself in the past? Take a moment to assess whether this is a task you've accomplished previously. In Mel Chin's case, he'd never had a retrospective of this magnitude before so he organized a team that included a studio manager, an archive specialist, and several other studio assistants to prepare for his retrospective exhibition. A realistic goal is one that you have the resources (time, help, advice from others knowledgeable about the steps) to complete.

**Timely:** How much time do you need to accomplish your goal? How will you structure the time needed, given your current commitments? When you set a deadline to accomplish your goal, consider all of the other things that consume your time. Many of us have other jobs, deadlines, or a family to take care of. Carefully review your schedule, commit a certain amount of hours or dedicated days per week to your goal, and then see it through.

Keep in mind that a key component to reaching an inventory goal is the level of growth and learning gained from going through the experience. To ensure your vision and goals remain in alignment, incorporate periods of time to revisit and revise your goals along the way.

## Defining and Setting Goals

Give yourself the freedom to brainstorm. Think big about what you want to accomplish with your inventory project before you begin drafting your goals. Take the time to review and refine your list until you feel ready to move forward into the next stage of goal setting.

Once you've identified which items on your list you want to formulate into actual goals, use the following worksheet to guide you through the goal-setting process. The worksheet questions will help you to determine whether the goal addresses an immediate need or contributes to a much larger objective. It will also offer guidance on how to craft a S.M.A.R.T. long-term goal that is broken down into a series of S.M.A.R.T. short-term goals with steps and manageable tasks.

You may also find it helpful to categorize your goals by inventory areas (physical, narrative, operational, digital). Be prepared to repeat this exercise and even incorporate it into your studio's operational routine. Remember, as you make new work it will always need to be documented and inventoried.

## See Roadblocks and Limitations as Part of the Process

Once you have spent a few weeks on your inventorying goal, pause for a day to evaluate. What has worked? What has been frustrating? What has happened that's inspired you to do more? The answers to these questions can help you to refine your working process and set new goals.

This evaluation may lead you to revise or let go of your original plan. Don't be afraid of this important step in the process. It's never time wasted when you're figuring out a system that works for you.

## PERSPECTIVE

BY CATHERINE CZACKI, PHD

# Making Room and Time for the Emotional Parts of the Journey

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As a legacy specialist, I learned a few key lessons that influenced the level of care, pacing, and sensitivity with which I approached career documentation work with the artist Mimi Smith. I continue to use these lessons in my work as an educator. You may find the following list of considerations helpful as you revisit the past and reconnect with the items related to your life's work and career:

- » Sifting through years of artwork, ephemera, and records also means revisiting welcome and unwelcome memories associated with them. Extend yourself some grace while you unpack and reorganize.
- » Storytelling may become an integral part of your inventorying process. Retelling stories may elicit a visceral response. In those instances it may be wise to pause and fully acknowledge the event remembered, before moving on and continuing with the inventory work.
- » Reflecting on and addressing the challenges that arise while you document and inventory your work is part of the process. Use this as an opportunity to reassess your goals and priorities and to seek out additional help as needed.
- » Organizing and inventorying a lifetime of work may accelerate your desire for greater agency and visibility. Use the momentum gained from organizing your inventory to leverage future opportunities.
- » The career documentation process reveals the many rich and complicated aspects of crafting a life as an artist.

# Worksheet: Long-Term Goal Setting

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**Describe your **long-term goal** in as much detail as possible.**

Why do you want to accomplish it? What does completing this goal bring to your life or career?

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**Is it possible to break this goal down into smaller, short-term goals? List them here:**

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**From the above list, what's the most important action to take?**

(Add this to your short-term goal worksheet on the next page.)

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**When do I want this long-term goal completed by?**

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**What are a few ways I can measure success in the process of completing this goal?**

For instance, ease in finding documents, better studio management, more time to create rather than sorting through clutter...

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**When will I pause to evaluate whether this goal is working for me?**

(Be specific with a date.)

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# Worksheet: Short-Term Goal Setting

Describe your **short-term goal** in as much detail as possible.

Why do you want to accomplish it? What does completing this goal bring to your life or career?

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Does this short-term goal support any long-term goal? If so, state it here:

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I will begin this short-term goal with one action by (date):

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I'd like to complete this short-term goal by (date):

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Does this short-term goal have to do with:

☐ physical organization ☐ narrative organization ☐ operational organization (or) ☐ digital organization



**Do I have what I need to get started today?**

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**If not, what do I need to purchase or procure to then start this short-term goal?**

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**Describe what the completion of this goal looks like.**

For instance, a file system in my home office that I can easily access day-to-day.

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**List the steps you will take to complete your short-term goal.**

This can include as many small steps as you will need.

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Repeat this exercise for as many long-term or short-term goals as you need to inventory your work and career. Remember, the more you revise and revisit these steps the more these will feel like goals that you can accomplish.





Antonia A. Perez is an artist, educator, and legacy and archiving consultant. She trained and worked as a legacy specialist with the Joan Mitchell Foundation from 2013 to 2016, and brings more than three decades of experience in teaching and educational programming to her consulting work. In this chapter, she unpacks the ways in which artists can engage assistance in the career documentation process, as well as considerations in developing trust and a strong foundation for the working relationship.

Antonia A. Perez, *Ofrenda*, 2019. Crocheted plastic bags and aluminum wire, 96 x 69 inches (243.84 x 175.26 cm). Photo by Cibelee Vieira.





# Creating a Support System and Work Plan

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BY ANTONIA A. PEREZ

As you begin your career documentation you may need and want some assistance from others with a range of abilities and expertise particularly suited to different aspects of the process. Especially if you have many years of work in your inventory, the task at hand can seem daunting unless you establish a support team of knowledgeable and experienced people. In thinking about the people you want to support you, recognize that you will be bringing people to work with you in your studio, inviting them into your personal space as well as giving them access to sensitive information about your work and career.

You will want to work with people with whom you can establish a relationship built on trust. Think about your close contacts and associates. Who among them could become part of your team or connect you to others who come recommended? In this way you can assemble a team of qualified people to form your career documentation support system.

## Assembling Your Team

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### Affinity/Peer Groups

If you belong to an artist's group for example, perhaps there are others who are embarking on this process or who have been doing it for a while. You might establish a periodic legacy planning

meeting in which those interested can share tips, goals, and successes and challenges with each other as a means of practical and emotional support.

There may be someone within this group that would exchange career documentation assistance for a service that you have to offer. Spend some time taking stock of the skills each person brings. Is someone in your group an expert with computer programs? Perhaps they can help you set up an inventory system for your digital archive. Perhaps someone is good at organizing space and can help you create a practical storage system in your studio that doesn't take away from your workspace too much.

## Partnership

You might also consider partnering with another artist to support each other with your career documentation process. This can help you both stay on task, save time inventorying the work, be a source of moral support and encouragement, and a sounding board for troubleshooting. It can also help you to establish work habits for organizing and managing your studio that pave the way for assembling your future support team.

## Studio Assistant/s

If you have a studio assistant or plan to hire one specifically to assist you in career documentation, first identify the specific projects or tasks you want your assistant to take on. What will they be doing, and what skills do they need to have?

Keep in mind that if you plan to hire someone you should be informed about your obligations either as an employer to an employee/s or as a client to a contractor. It is critical that you are very clear on what the working relationship is from a legal and tax standpoint to be able to understand and fulfill your mutual obligations. For more information on clarifying the nature of your business relationship, read [“Expert Opinion: The Significance of a Contract or an Agreement,”](#) on page 147.

## Intern/s

Having an intern work with you in your studio on your career documentation project can be of invaluable help to you and be an important learning experience for them. You might find an intern through an internship or work/study program in the fine arts, art history, or arts administration departments of a local college who would benefit from working in your studio. These types of students are also likely to have a number of the skills you might need, such as an understanding of artwork processes, the ability to use computers and technology, and a knowledge of art handling. The important thing is to develop an internship that is mutually beneficial and enriching, for college credit where possible, and preferably with some monetary compensation.

## Consultants

You may contract with different types of consultants for short-term or intermittent work on specific projects, such as a carpenter to build shelving or racks; an art handler to assist with packing and moving large artworks; a technology specialist to assess your systems and make recommendations on equipment or software; a legacy specialist to help you devise a work plan for your inventory management system and/or help you implement those plans. You will want something in writing,

such as a Scope of Work, which describes the specific responsibilities and terms of work to which all parties agree. For more related information on incorporating a Scope of Work into your agreed work plan see “[Expert Opinion: The Significance of a Contract or an Agreement](#),” on page 147.

## Family and Loved Ones

Family members and loved ones may be a good resource in helping you achieve your career documentation goals, particularly if they are interested in art, and in your work specifically. Whether or not they help you with the actual tasks of creating and maintaining an inventory of your artwork along with your digital and physical archives, it is advisable to involve one or more of your loved ones in the process by sharing what you are doing and why. They need to understand how you value your work and what your intentions are for your legacy after you are gone. Spend some time taking them through the archive so that they can easily access and understand your records and inventory system. You may identify someone close to you whom you can really trust and who shows the commitment and consistency over time that is necessary to become an executor of your will or be in charge of your estate. As you think more long term about your legacy and assembling your team of personal representatives, do consult the “Your Team” chapter, page 19, of the 2015 Joan Mitchell Foundation publication *Estate Planning Workbook for Visual Artists*.

## Involving Your Community

Think of the strong relationships you have in your community as an asset; especially if you are an educator, make public artworks, are a member of a local arts organization or workshop, or have a socially engaged art practice. Let your community know you are engaging in a legacy project to document and inventory your artwork and records, and why. At some point individuals from your community may want to get involved and assist you in the process. Sharing with community members about your documentation process may even put you in direct contact with other local initiatives who are equally invested in the long-term preservation and growth of the community. By making these connections you will expand your network of supporters who also see you and your contributions as an integral part of the community’s cultural narrative. Think about the relationships you have in your community. Which individuals or organizations are able to provide more context-enriching information about you and your work? Who is truly invested in supporting your efforts? Who would be willing to join you?






## Involving Your Gallery

If you have a gallery or galleries, make sure to inform them about your inventory project. They will probably be glad to hear that you are embarking on this project and may be able to provide you with useful information to help fill in some blanks if you have worked with them for some time. Be clear, though, that their records can not substitute for your own record-keeping. You are the authority on your own work. If you have a new relationship with a gallery let them know early on what you are doing. Some galleries may be reluctant to share collector information, but it is worth it to come to an agreement with them about how sale and collector information may be held by both parties.

# Essential Skills for Your Team

The people who make up your team should be people you feel comfortable with in your studio. They are going to be handling your artwork and be engaged with some private details of your life and your career. You will want team members to have some or all of the following skills and sensibilities, though much of it can be learned through the process of working with you.

## Desired skills:

 <b>Knowledge &amp; Appreciation of Arts and Culture</b>	Be generally knowledgeable about art history and art historical movements and artists of the last century. Be aware of current art movements and trends. Be aware of the social/political implications of inclusion and exclusion of artists and movements. Be familiar with a range of artistic mediums, processes, and techniques.
 <b>Organizational &amp; Project Management Skills</b>	Understand the scope of the work involved in developing a physical inventory and related documentation. Be able to break down large projects into manageable tasks. Be mindful of small details while remaining aware of the big picture. Be able to coordinate the flow of work between physical inventorying and digital record-keeping. Be able to track the status of a project and communicate about its progress along with the methods used.
 <b>Communication &amp; Interpersonal Skills</b>	Have strong written and spoken communication skills. Be a good listener. Be patient and understanding. Be curious and respectful. Be willing and able to ask for clarification and/or confirmation when uncertain. Be reliable.
 <b>Technology Skills</b>	Be proficient in a range of computer software platforms, including spreadsheets and databases, and word processing, photo editing, design, and email programs. Possess basic photography skills for simple documentation purposes. Be able to troubleshoot common glitches that arise when using computers, external hard drives, printers, scanners, and wireless networks.
 <b>Art Handling Skills</b>	Be able to handle art with care and understand how to wrap and store various types of artworks. Be familiar with archival materials and the systems used for safely storing artworks.



# Getting Started with Your Team

As you and your team get to know each other and establish a working rhythm there will be many informal conversations.

## Be sure to clearly address the following:



### Introduction to Artwork, Studio Space, and Systems

Talk about the kind of work you make and share examples in your studio and a timeline of the various periods of your work. Take team members around your studio to familiarize them with work areas, storage areas, and even where to put their personal items when they arrive. Share any systems you have in place in your studio, such as where you put work ready to be photographed, when the trash is taken out, and so on. Explain how work is physically handled, what surfaces can be used to place things on, and how to interact with visitors in the studio. If a number of people are working at the same time, designate work areas for each and explain how they will support each other in the working process.



### Establishing a Work Relationship

Though you already have a written agreement that describes the Scope of Work and compensation, talk it through at the beginning. Encourage your team members to ask questions. Be open in talking about your working process and your plans for your inventory system. Be clear that you will guide them in tasks they may not be familiar with and also welcome their suggestions. Always ask if they have questions about anything you have discussed and be available to answer them fully.



### Creating a Clear Work Plan and Schedule

It is important to have a specific work plan and schedule in place as you begin. Each team member should know in advance exactly what their working hours are and what is expected of them during that time. You might prepare an outline for your work plan before they start and then flesh it out together with them. You could establish a regular check-in time with each team member. A regularly scheduled team meeting at the start of each work session could also help to maintain a smooth workflow.



### Prioritizing Tasks and Tracking Progress

Be clear about which tasks take priority, and try using the following worksheets to set up a schedule and work plan. Keep track of progress through regular written reflections or by keeping a log. Be clear that these logs and reflections are an integral part of the development of the inventory.



Aminah Brenda Lynn Robinson, *Themba: Sunrise* (from *Themba: A Life of Grace and Hope* series), 1996–2012. Mixed media on paper, 21 x 83 inches. Columbus Museum of Art, Estate of the Artist.

## CASE STUDY

BY DEIDRE HAMLAR

# Aminah Brenda Lynn Robinson: From Community Ties to a Lasting Legacy

In the case of artists seeking to secure their work for future audiences, creating a legacy plan may involve depending on or entrusting their work to those closest to them, such as family members, friends, representatives, gallerists, lawyers, bankers, community organizations, and museums. In the case of artist Aminah Brenda Lynn Robinson (1940–2015) of Columbus, Ohio, she considered all of these options, but it was her relationship with the Columbus Museum of Art that proved to be the right one.

Aminah, as she preferred to be called, was a prolific and organized artist who documented the multimedia works she created from the age of ten to seventy-five the old-fashioned way, with Inventory Numbers affixed to the work and slides arranged meticulously in binders by date, series, subject matter, and medium. Through her art and writing, Aminah expressed great respect and love for her family, friends, and community, yet it was her established relationship with the Columbus Museum of Art that enabled her to entrust the Museum with her estate, including her art, real property, and personal effects, upon her death.

The relationship between Aminah and the Museum evolved over several decades. Born and raised on Columbus's East Side, not far from the Museum (then called the Columbus Gallery of Fine Arts), Aminah enjoyed close proximity to the Museum and may have attended Saturday art classes there as did many youths from the community during that time. While we do not know when she first walked through the Museum doors, we do know she proudly remembered that a poster she created in high school was included in one of the Museum's group shows. As well, Aminah attended classes at Columbus Art School, which was then part of the Columbus Gallery of Fine Arts complex, and would later attend it (now Columbus College of Art & Design) as a full-time college student.

Fostered by Aminah's relationship with another revered Columbus artist, Elijah Pierce, the trust between Aminah and the Museum grew over time. In the early years, the Museum asked her to contribute an essay about Pierce for a major retrospective, and as an art teacher for the Recreation and Parks Department, she was asked to create art programs to serve Columbus youths. Soon after, Aminah gifted works to the Museum which would grow to a collection numbering in the hundreds.

In the 1980s, the Museum began developing exhibitions that would travel throughout the US. By 1990, Aminah was a fixture in the Museum galleries, books, and innovative educational programs and arts spaces. From her first exhibition, *Pages in History: The Art of Aminah Robinson* in 1990, followed by five additional solo shows, most notably *Symphonic Poem: The Art of Aminah Brenda Lynn Robinson* in 2002—and through the four projects since her death—the decades-long trusting relationship with the Museum, its longtime director Nannette Maciejunes, and staff, was cemented.

Aminah was prolific, generous, and a planner. Her concern in doing her art was to share with future generations her love of community and knowledge about place, the past and the present. She contemplated her legacy over many years and consulted with the Museum director about what leaving her body of work to the institution would mean. It was clear in her conversations with the director that she wanted her art held safely for the benefit of the community and that she and the Museum be forever intertwined.

Upon her passing, Aminah bequeathed her vast trove of artworks, her home, library, and all personal effects, even her beloved dog, Baby, to the Museum. Upon examination of her papers and journals, it was discovered that Aminah had always hoped that her home studio would become a place of research, and that the community would benefit from her artwork long into the future. When the Museum director asked Aminah what she would like them to do with her estate, Aminah replied, "You will know what to do." In 2015, the Museum convened a special committee to contemplate how to effectuate Aminah's wishes. After meticulously clearing, examining, and archiving the art and writing found in Aminah's home following her death, Carole Genshaft and I co-curated the Columbus Museum of Art's most comprehensive exhibition of Aminah's to date, *Raggin' On: The Art of Aminah Brenda Lynn Robinson's House and Journals*, November 21, 2020–October 3, 2021, accompanied by an award-winning catalogue of the same name edited by Carole Genshaft. In 2021, Aminah's renovated home studio was opened to its first artist-in-residence.

Since her passing, the Museum has set forth successfully on a mission through the Aminah Robinson Legacy Project to realize Aminah's dream, to preserve, store, and exhibit her artwork; to renovate her home studio for the benefit of African American fellows and residents; to develop a library and archive for her books and writings; and to develop an endowment to preserve her art and programs for the education and joy of audiences and scholars far into the future.

Through Aminah's generous and thoughtful decision, the Museum family, the immediate community, and her legacy to the American art scene will flourish.

# Worksheet: Establish a Work Schedule

Worksheets are a useful tool when planning the schedule and steps necessary to create your physical and digital inventories. They help you to clearly see what you intend to complete, who will be performing the tasks, and by what date the work should be done. Use the following templates below to create your own schedule, set project goals, and outline work plans.

## Example

### Your Work Schedule:

Mondays and Wednesdays, 12pm-4pm, Studio Assistant and Artist (sorting, numbering, photo documentation, packing)

Thursdays, 10am-2pm, Art History Intern and Artist  
(scanning, filing, data entry)

### Weekly Work Schedule:

This schedule is for the period of 2 / 1 / 2022 through 2 / 28 / 2022.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
TIME 12pm-4pm	TIME	TIME 12pm-4pm	TIME 10am-2pm	TIME	TIME	TIME
PERSON(S) Artist + Studio Assistant	PERSON(S)	PERSON(S) Artist + Studio Assistant	PERSON(S) Artist + Art History Intern	PERSON(S)	PERSON(S)	PERSON(S)
TASK(S) sorting, numbering, photo doc., packing	TASK(S)	TASK(S) sorting, numbering, photo doc., packing	TASK(S) scanning, filing, data entry	TASK(S)	TASK(S)	TASK(S)

## Your Work Schedule:

## Weekly Work Schedule:

This schedule is for the period of \_\_\_\_ / \_\_\_\_ / \_\_\_\_ through \_\_\_\_ / \_\_\_\_ / \_\_\_\_.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
TIME	TIME	TIME	TIME	TIME	TIME	TIME
PERSON(S)	PERSON(S)	PERSON(S)	PERSON(S)	PERSON(S)	PERSON(S)	PERSON(S)
TASK(S)	TASK(S)	TASK(S)	TASK(S)	TASK(S)	TASK(S)	TASK(S)

# Worksheet: Develop a Work Plan

Chapter 2, “Beginning the Career Documentation Process: Setting Priorities and Goals,” on page 15, takes you through how a goal turns into a work plan. In this section the following activities will guide you in creating a clear outline of the projects you intend to accomplish in both the physical inventory of your work and ephemera and the digital record-keeping. Include projected timeframes and who will be working on each task. Your work plan should establish a flow of work that makes each step in the process the most natural and logical next action to take as you develop your inventory.

For example, if you have a quantity of work that needs to be photographed, assigned Inventory Numbers, and properly stored, but you don’t have a worktable and photography set-up, putting that in place should come first. The following are sample work plans to use as a reference in developing your own.

## Example 1

Project/Goal: Physical Storage and Inventory of Artwork				
	Activities	Timeline (Begin By/Complete By)	Person Responsible	Resources/ Needs
A	Create and affix Inventory Numbers to all works on paper from the current year (approximately 60 pieces).	June 1	Studio Assistant	Existing digital inventory to follow sequential numbering
B	Photograph all of the above works.	June 8/June 15	Studio Assistant and Photographer	Camera and table set-up for photography
C	Wrap, label, and store the above work in folders within the flat files.	June 16/June 30	Studio Assistant	Archival folder paper, glassine, labels, ruler, cutting table
D	Scan exhibition lists, announcements and gallery correspondence from the 1990s.	June 1/ July 31	Art History Intern	Original paper documents, scanner, table
E	Create Inventory Numbers for the above documents and file chronologically by category and number.	June 1/July 31	Art History Intern	Access to existing Inventory Numbers for existing filed documents, archival file folders, labels, computer and printer

## Example 2

Project/Goal: Digital Inventory of Current Year Works on Paper				
	Activities	Timeline (Begin By/Complete By)	Person Responsible	Resources/ Needs
A	Enter images of current year works on paper into database/spreadsheet with Inventory Numbers, dimensions, mediums and other pertinent information	June 16/June 30	Studio Assistant	Computer
B	Enter all scanned gallery correspondence, exhibition announcements, and exhibition lists from 1990s (as above)	July 1/August 31	Art History Intern	Computer
C	Link the above in the database/spreadsheet to the individual artworks exhibited	July 1/August 31	Art History Intern	Computer



## Develop Your Own Plan

For each of the project goals outlined in your work plans, an action plan needs to be created. Use the table below to clearly state your project goals and work plan including tasks to be completed, by whom, with start and completion dates and resources needed for each task.

Project/Goal:				
	Activities	Timeline (Begin By/Complete By)	Person Responsible	Resources/ Needs
A				
B				
C				
D				
E				
F				

# Worksheet: End-of-Workday Reflection/Log Entry

Each person working on your archive, including yourself, needs to record the actions that were taken in the archiving process at the end of each workday. This should also include planned next steps or any issues that come up that need to be dealt with. Doing so will help ensure clear handoffs and keep everyone on the same page.

## Example

### End-of-Workday Reflection/Log Entry

Reflective Questions	Log
What action items were tackled today?	<b>Response</b> Sorted all work from Flat File A in piles onto the worktable. Categories: watercolors, pencil drawings, mixed-media drawings, collages
	<b>Things to consider</b> 
What was accomplished?	<b>Response</b> Wrote Inventory Numbers on the back of each of the above pieces in pencil. Noted measurements and mediums of each piece in notebook with Inventory Numbers.
	<b>Things to consider</b> One piece has a large tear. Artist needs to advise.
What needs to be done in preparation for the next workday?	<b>Response</b> Set up photo documentation station. Print out and complete condition report for artwork with tear.
	<b>Person/s Responsible</b> Studio Assistant
What are the action items for the next workday?	<b>Action Items</b> Photograph all the above pieces. Upload images and noted data to database.
	<b>Person/s Responsible</b> Studio Assistant and Photographer

## Complete your own End-of-Workday Reflection/Log Entry

Date: \_\_\_\_\_

Reflective Questions	Log
What action items were tackled today?	Response
	Things to consider
What was accomplished?	Response
	Things to consider
What needs to be done in preparation for the next workday?	Response
	Person/s Responsible
What are the action items for the next workday?	Action Items
	Person/s Responsible

Other Comments/Issues/Questions:

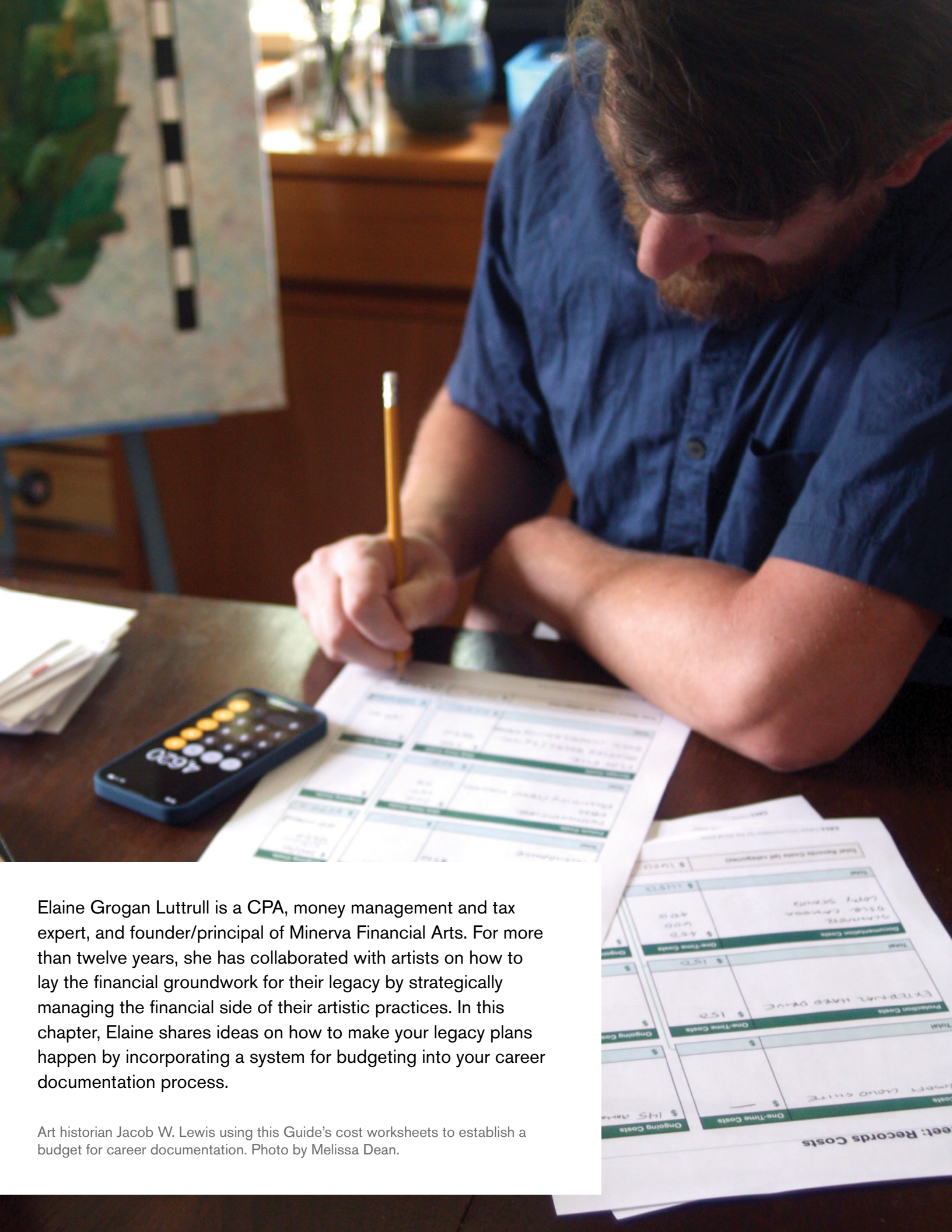
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Elaine Grogan Luttrull is a CPA, money management and tax expert, and founder/principal of Minerva Financial Arts. For more than twelve years, she has collaborated with artists on how to lay the financial groundwork for their legacy by strategically managing the financial side of their artistic practices. In this chapter, Elaine shares ideas on how to make your legacy plans happen by incorporating a system for budgeting into your career documentation process.

Art historian Jacob W. Lewis using this Guide's cost worksheets to establish a budget for career documentation. Photo by Melissa Dean.

Project: Records Costs			
One-Time Costs		Ongoing Costs	
Total		Total	
\$ 150		\$ 145	
EXTERNA LIVED ORKE		LIVED ORKE	
\$ 150		\$ 145	
PRODUCTION COSTS		PRODUCTION COSTS	
\$ 450		\$ 450	
STAMPING COSTS		STAMPING COSTS	
\$ 400		\$ 400	
TOTAL		TOTAL	
\$ 1500		\$ 1500	
Total Records Costs (all categories)			

# 4

## Budgeting for Your Inventory Practice

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BY ELAINE GROGAN LUTTRULL

You know what matters: your work and leaving an artistic legacy. In this chapter, we figure out how to make that happen by considering the costs you'll incur as part of this process.

I have the privilege of working with creative individuals on the money side of their studio practice. In my work, creativity always comes first. It has to. The financial pieces of a creative business are informed by the creative work. They don't lead that work.

It is within that framework that I share these ideas about budgeting as part of the career documentation process, and I invite you to consider them along with me in a judgment-free way.



# Five Scenarios

The costs you may incur as part of the career documentation process depend on the current state of your records in relationship to your career and how you'd like those records to be. So let's begin by exploring the five different record-keeping scenarios you may find yourself in—regardless of where you may be in your career. Then we'll use a worksheet to capture costs in a variety of categories, and we'll conclude by touching on some funding options to cover these costs.

 <b>Just Starting Out</b>	If your records are relatively sparse or perhaps early in their formation, you might be looking to establish some good habits moving forward. It's never too early to think about your legacy. Your goal might be to explore your options by chatting with mentors and peers about the systems they use, eventually building an affordable system that works for you. These systems may range from manual lists to database-type systems you maintain yourself.
 <b>Ready for an Upgrade</b>	If you have been keeping a bare-bones system for a while you may be ready to upgrade, especially if you are comfortable investing in your practice. These upgraded options are more robust: you can capture the full history of a piece, create custom reports to save time, and integrate information about the artwork into your financial system. Your goal might be to do more record-keeping in less time through a software-based subscription service. You may also be thinking about hiring an assistant to help manage the system.
 <b>Clearing the Backlog</b>	If your records are relatively sparse but your career is extensive, you may have some catching up to do. You may not have gotten around to keeping records (yet), but it's probably time. Your goals might be to get started on the process, to identify the type of system you want to end up with, to engage assistance, and to actually embrace a system that works for you going forward. Plan to give yourself plenty of time to clear the backlog, one work at a time.
 <b>Passing the Torch</b>	At some point, you may be thinking about passing on your records—and the management of your legacy—to someone else. Your goals might be to engage someone on an ongoing basis, to review the narratives to make sure they resonate accurately, or to share your love of the work with those around you. A system at this stage may include recorded stories, narratives, or lessons learned in addition to information about and images of the work.
 <b>Providing Support</b>	And lastly, you may not be an artist at all, but rather a legacy specialist—someone who is supporting an artist in the career documentation process. Your objective might be to suggest realistic record-keeping goals, to budget for those goals, and to build and maintain the inventory system—whether it be physical, digital, outsourced, or a combination of those things.



## Scenario Reflection

Which scenario best describes your situation right now? What most excites you about being here? What are you worried about?

Which scenario best describes where you think you'll be in five years? Does it make sense to start planning for that scenario now? How will your budget change?

## Categories of Costs

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No matter what stage you're in, you'll probably have some costs associated with this process, and those costs fall into a few major categories:



**Space**



**Records**



**People**



**Time**

The worksheets and examples on the following pages walk you through each category so that you can begin building a budget to support these costs. Some of these categories might fit your situation perfectly. You may find yourself skipping other categories entirely. You get to decide what makes the most sense for you, especially given where you are in your career and what stage your records are in.

Each category is set up so you can brainstorm (in words) first, then estimate the costs associated with the words you listed.

Think about both one-time costs (costs you will only have once, perhaps to purchase equipment) and ongoing costs (costs that you will incur on a regular basis, perhaps once per month or once per year). At the end of each section, add up the costs you've estimated.

If you are feeling stuck in a particular category, there are examples that might prompt your own ideas, but don't feel bound by the examples. After all, you know yourself and your work best.



# Space Costs

Where do you store your work now? In this section, think about where your storage is now and where you would like it to be. It might be in your home, in your studio, in an external storage space, or somewhere else entirely. This is part of a larger preservation planning process in which you consider the storage, care, and protection of the work long term. Describe the place where your work will be stored.

## Studio Costs

Once you've done that, think about the costs associated with that space. Will there be a mortgage payment or a rental fee each month? If the space is part of your home, roughly what percentage of your home will be used for storage?

You'll also want to consider protection costs for the space, including insurance if that is something you purchase separately. (And while researching space, consider asking your potential landlord about any existing insurance policies that may cover the contents of your studio or storage unit!)

## Studio Costs Example: Avery

Avery pays \$1,000 per month for a studio space, and they plan to use about 30% of the space for the storage of their work. (They estimated this amount loosely based on appearance.) Avery calculates that 30% of \$1,000 is \$300, so the ongoing cost of storing their work is \$300.

Studio Costs	One-Time Cost	Ongoing Costs
30% of my studio will be used for storage, the monthly fee is \$1,000, so \$300 (30%) will be the ongoing cost.	n/a	\$ 300 per month

## Fixture Costs

But of course, the space isn't only about the space. You may need lighting, temperature controls, locks, cameras, or other permanent fixtures to utilize the space in the way you want. List those things and estimate the one-time or ongoing costs for each item.

## Fixture Costs Example: Brett

Brett has a studio they love, but they can't control the inside temperature of the space. In the summer, it gets dangerously humid, which can damage their work. Brett decides to purchase a dehumidifier, fan, and temperature monitor to track the humidity and keep the air flowing in the summer to protect their work. The dehumidifier (\$150), fan (\$150), and temperature monitor (\$80) cost \$380 in total.

Fixture Costs	One-Time Cost	Ongoing Costs
Dehumidifier, fan, and temperature monitor The studio can get humid in the summer, so I need to purchase and maintain equipment to help cool and regulate the storage space temperature.	\$ 380	\$ 40 per year dehumidifier filter replacement

## Storage Costs

Once you have the space and the fixtures associated with it, imagine what you will need inside the space. What furniture will you need? (Think about filing cabinets, drawers, a fire-resistant safe, etc.) Describe the furniture you'll need.

What materials will you need for storage? (Think about boxes, bins, special protection paper, sleeves, etc.) What about organization inside the space? (Think about labels, stickers, wall signage, or anything else that might help.) List those items.

After you list everything, estimate the one-time and ongoing costs for each item. Do some research if you need to, but don't lose sleep over getting the number exact. You can always update it later.

## Storage Costs Example: Cameron

Cameron spent entirely too much time on an art supply website identifying potential ways to organize her artwork inventory. She finally decided on a medium-sized flat file to store her prints, plus some acid-free interleaving paper to protect each piece. The flat file she likes best is \$750, and she estimates she'll need one roll of acid-free interleaving paper each year.

Storage Costs	One-Time Cost	Ongoing Costs
Medium-sized flat file	\$ 750	n/a
Acid-free interleaving paper for storage Will likely need one roll per year for all materials	n/a	\$ 150 per year



## Records Costs

At this point, you have likely finished thinking about the space you'll need to store and protect your work. (But if you think of additional things you'll need, go back and add them to the space section!)

Now it's time to think about how to keep track of your work. The record-keeping costs are divided into three categories: system costs, protection costs, and equipment costs.

### System Costs

First, you need to decide on the system you plan to use. Is it a notebook and a pen? Or spreadsheets? Or a formal inventory management system? You get to decide based on what works best for you. List and describe your system along with the one-time or ongoing costs associated with it.

### System Costs Example: Dylan

Dylan uses an Excel file to track their inventory. They already have Excel on their computer, but each year, they must renew their subscription to the Microsoft Suite for \$145.

Dylan may decide to hire someone to enter data and maintain the spreadsheet on a regular basis. That person's cost will be part of the People section of the budget. As you fill out each category, consider if there are (or will be) people costs involved and make sure to capture those costs as well.

System Costs	One-Time Cost	Ongoing Costs
Microsoft Excel Use of Excel requires annual subscription to Microsoft Suite	n/a	\$ 145 per year

## Protection Costs

You've already listed some protection costs within the space itself (for example, temperature control, locks, and insurance). Now think about protection costs associated with your system. Will you make a second copy of the list of inventories in your notebook? Will you have a backup of your spreadsheet on an external hard drive? Think about how you'll protect your system and estimate the associated costs.

## Documentation Costs

As part of tracking your work, you'll need digital images of the work. If you haven't already planned to get a scanner, camera, lightbox, or any other equipment you'll need to document your work, make sure to list and quantify those costs here.

It's also possible you are planning to hire someone to document your work, depending on your needs. That person's fee can be part of the People Costs in the next section.

### Protection Costs Example: Elliott

Elliott already has one external hard drive, but he wants a separate one that will only have digital backups of his inventory system and work. He needs one with a vast amount of storage, and the one he wants costs \$150.

Protection Costs	One-Time Cost	Ongoing Costs
External Hard Drive Already have one external hard drive; will purchase second solely for inventory backup	\$ 150	n/a

### Documentation Costs Example: Frankie

Frankie creates mixed-media collages, and her documentation plan is to scan each piece after it is complete. She needs a high-quality scanner, which she can purchase for \$450. The scanner also costs approximately \$50 per year to clean and maintain.

Documentation Costs	One-Time Cost	Ongoing Costs
High-quality scanner	\$ 450	\$ 50 per year



## People Costs

You've already covered where you'll store your work, what you need to store your work, and how to track your work. But you don't have to do all this alone. In this section, list the people you may need for support as part of this process.

### People Costs

These individuals may include your gallerist, a legacy specialist, an intern, a studio assistant, a volunteer from a library or historical society in town, your family members, others from your community (perhaps a long-time collector or fan of your work), or your peers (perhaps an archiving group, a critique group, or specific supporters who are going through this process together). For more ideas on how to assemble your team of people, make sure to revisit [Chapter 3, "Creating a Support System and Work Plan,"](#) on page 25.

These individuals can do any number of tasks. Perhaps they help build and maintain a tracking system for your work. Or perhaps they focus on photographing your work or transcribing conversations or stories you share. They may help with research tasks associated with your career, or they may simply transport work from your studio to a storage space.

### People Costs Example: Dylan

Remember Dylan on [page 44](#)? Dylan used an Excel spreadsheet to track inventory. After a while, though, they fell behind and decided to hire someone to help.

People Costs	One-Time Cost	Ongoing Costs
Documentation assistant Hire assistant to update Excel spreadsheet with completed works (40 hours @ \$15 per hour) Retain assistant to keep system up-to-date (4 hours per month @ \$15 per hour)	\$ 600 to get caught up	\$ 60 per month for ongoing support

### People Costs Example: Gabriel

Gabriel knows he can photograph his own work, but he never seems to find the time to do it. So instead of waiting, he hires a photographer quarterly to document his work. He pays the photographer \$300 per session, or \$1,200 per year.

People Costs	One-Time Cost	Ongoing Costs
Photographer Hire photographer to document work	n/a	\$ 1,200 per year



## People Costs Example: Hoshi

Hoshi organized a monthly meeting with three other artists in her critique group. The purpose of the meeting is to hold each other accountable to archival tasks so they don't fall too far behind in documenting their work.

Note: Even though there isn't a dollar cost associated with this, keep it in your budget. It will help to clarify your thinking and to plan for the future.

People Costs	One-Time Cost	Ongoing Costs
Archival group Organize group of four artists to hold each other accountable every month	n/a	n/a

## People Costs Example: Jude

Jude is overwhelmed and not particularly computer literate. (In fact, just hearing the word "Excel" makes Jude's stomach drop.) Jude wants as much help as possible for the career documentation process, so they may outsource the job completely. Jude might also need to revisit the system cost section and add a subscription to the system the assistant recommends.

This example illustrates the iterative process of budgeting. It is perfectly fine to go back to previous categories and update what you'll need based on changing information, just as Jude did here.

People Costs	One-Time Cost	Ongoing Costs
Documentation assistant Hire assistant to build and update system from scratch, then maintain the system quarterly	\$ 4,000	\$ 250 per quarter (\$ 1,000 per year)

System Costs	One-Time Cost	Ongoing Costs
Subscription to artist database system Annual subscription for unlimited storage and users	n/a	\$ 300 per year



## Hospitality Costs

Regardless of whether you plan to pay the individuals that are part of your archival support network, it probably makes sense to budget for some hospitality costs to support them. This could be thank you gifts, coffee or bagels during monthly meetings, or a special annual lunch for each person.

### Hospitality Costs Example: Kelly

Kelly organized an archival group meeting in her studio with three other artists so that they can hold themselves accountable to each other. But Kelly dislikes having these meetings without refreshments, so she always brings pastries from her favorite bakery to share. This cost is about \$15 per month.

Hospitality Costs	One-Time Cost	Ongoing Costs
Pastries for monthly archival group meeting	n/a	\$ 15 per month

### Hospitality Costs Example: Lennox

Lennox has decided that this is the year he is going to get his documentation plan in order, but he isn't going to do it alone. He has enlisted the help of his gallerist, his local arts council, and his library. None of the individuals involved charge him for services, but he sends them all thank you gifts at the end of the year.

Hospitality Costs	One-Time Cost	Ongoing Costs
Thank you holiday gift cards to gallerist, arts council, and librarian (\$150 each)	\$ 450	n/a



## The Forgotten Cost Category: Time

So far, we've been focused on the space, materials, systems, and people you need for this process, and the budget (so far) reflects that. But there is one more crucial budget category worth considering: your time.

As an artist, you're already accustomed to assuming multiple roles and juggling multiple noncreative tasks in service of your art business. Review everything you have considered as part of this chapter so far and estimate how much time each task will take.

### Time Costs Example: Mel

Mel plans to store their work in a storage unit. It will take approximately eight hours over the next week to research the available units and visit each one before selecting the best option. Mel will also need eight hours to move their existing inventory into the unit, plus three hours each month going forward to move new work to the unit.

Storage Unit Set-up Time Costs	One-Time Costs	Ongoing Costs
Researching and visiting storage units	8 hours	n/a
Moving backlog of work into storage unit	8 hours	n/a
Time to move work into the unit each month	n/a	3 hours per month

### Time Costs Example: Nico

Nico plans to work with volunteer Vivian from the town's library to inventory her artwork. Nico estimates it will take ten hours to train Vivian during the first month. Afterwards, Vivian will mostly work on her own, although Nico plans to review the inventory each week (two hours per week) to make sure the information entered is accurate.

Volunteer Training/ Supervision Time Costs	One-Time Costs	Ongoing Costs
Training Vivian to archive work	10 hours	n/a
Reviewing archive for accuracy	n/a	2 hours per week

### Time Costs Example: Obi

Obi has an amazing gallerist who has promised to inventory a series of Obi's drawings from 2000 to 2002. But even with the gallerist sorting through the details, Obi wants to make sure their legacy is accurately captured. Obi plans to meet with the gallerist quarterly to touch base about the inventory process.

Gallerist Check-in Time Costs	One-Time Cost	Ongoing Costs
Check in with gallerist on archival process	n/a	2 hours per quarter

# Completing and Reviewing Your Budget

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Now that you have outlined the costs you think you'll have in various categories, add them up into one ultimate total. This is a complete list of expenses to incorporate into your annual spending plan (and to revisit each year). Because after all, documenting your work—your legacy—is an essential part of your ongoing practice. Allow it to be incorporated into the rhythm of your studio along with the other administrative tasks: updating your website, tweaking your artist statement, or filing your taxes.

These costs represent an investment in yourself and your creativity, similar to other business expenses. These costs—this investment—also protect you long term. By creating solid, accessible records for your work, not only are you respecting the professionalism of your career, but you are also gathering the documentation you may need for both tax and insurance purposes. For example, if you are audited and asked to provide evidence that your work is a business and not a hobby, having a comprehensive record-keeping system for your work can be part of the evidence you provide. Or if the work in your studio is ever damaged (say, by a flood or a fire), you'll be asked to provide documentation of the work for insurance purposes. This system can be a solid starting point for that claim.

## Funding Costs

As with any other business expense, you can fund these costs with either earned or contributed income (or a combination of the two). If you plan to fund these costs with earned income, make sure the prices you are charging capture the true value of the work and cover the true costs needed to run your studio. You may also consider exploring other sources of income (for example, teaching or guest lecturing) to generate additional income to offset these administrative costs. Funding costs with earned income is a good option for the ongoing costs you'll have.

Alternatively, you may want to explore grants or other sources of contributed income to fund these costs, especially the one-time costs. There is a scarcity of grants available to fund legacy projects, but you may be able to find ways to fund equipment (for example to pay for a scanner or a dehumidifier) or capacity (for example to pay for a studio assistant who will help with this project). If contributed income is part of your funding strategy, consider including administration and documentation in every project budget. Or, if you have a strong community of support, especially among collectors or other fans of your work, you may want to explore a crowdfunding option to support the documentation of your legacy.

The bottom line? By being clear on the costs associated with the administrative parts of your practice, you will set a realistic annual operating budget for your artistic practice overall, including your legacy. Then you can be intentional about building your practice in a way that takes into account how you want to be remembered and how you want your work to be preserved, documented, and shared.



Members of the Bay Area Women Artists' Legacy Project and their 2020 Legacy Project publication. Images courtesy of BAWALP website.

## CASE STUDY

BY JAN WURM, BAWALP MEMBER

# Bay Area Women Artists' Legacy Project: A Case Study in Working Together

The Bay Area Women Artists' Legacy Project (BAWALP) was initiated in 2014 by twenty-nine artists with shared visions for securing their legacies. Along the way, the group encountered complex, costly material obstacles, so they began by focusing on initial small steps.

BAWALP first focused on establishing a website that could serve as a directory for the participating artists, with a statement, a sampling of their work, and links to their individual websites. With a small initial investment, the women were able to pool their resources for a platform that could be extended and enhanced over time.

The group then worked together to publish a book documenting the artists and their work. All participants contributed to an honorarium for an introductory essay and committed to purchasing books to donate to the Library Project, which distributes books to museum and art school libraries. Minimal financial contributions were balanced through devoted volunteer time: designing, sizing image files, editing texts, wrestling layout, tracking payments, sorting, packing, and mailing. The initial printing was executed locally, followed by a print-on-demand edition with an online printer that manages fulfillment, thus allowing the group to focus on further documentation projects.

With small assessments of \$50 at a time, the group has been able to add pages to their website, publish books, and record a series of artist interviews they conducted with each other. The website is also expanding to document artists' materials and processes for future conservation of artworks. As an aging cohort, members have been urged to assist each other, to set aside funds for continued participation in the three additional planned publications and the maintenance of the website, and to share this information with a relative or in a directive.

## Worksheet: Space Costs

Studio Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Fixture Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Storage Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

<b>Total Space Costs (all categories)</b>	\$	\$
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## Worksheet: Records Costs

System Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Protection Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Documentation Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

<b>Total Records Costs (all categories)</b>	\$	\$
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## Worksheet: People and Hospitality Costs

People Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

Hospitality Costs	One-Time Costs	Ongoing Costs
	\$	\$
<b>Total</b>	\$	\$

<b>Total Support Costs (all categories)</b>	\$	\$
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## Worksheet: Time Costs

Time Costs	One-Time Costs	Ongoing Costs
Total Time Costs (all categories)	hours	hours



Archivist, filmmaker, and cofounder of the Nomadic Archivists Project, Steven G. Fullwood insists that it's never too early or too late for an artist to begin organizing their studio. For more than twenty-five years he has worked independently with artists and with institutions like the Schomburg Center for Research in Black Culture to preserve and make accessible the archival legacies of artists. In this chapter, he outlines key steps to mapping your space/s and organizing your physical and digital documentation, offering practical tips on how to integrate your organizational routines into lasting studio management systems that prepare you to fully engage with future opportunities.

Photographs and papers from the Arena Players community theater.  
Photo by Steven G. Fullwood.

# Taking Stock and Mapping Your Archival Legacy

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BY STEVEN G. FULLWOOD

Artists, now more than ever, are beginning to understand that their archival legacies—in addition to their artworks—matter. And not in some imagined future, but right now. As an archivist, I'd like to share some insights on the steps involved and lessons learned in taking stock of your own career and mapping your archive, which includes the physical and digital documentation of your artwork, your ephemera, professional records, and digital images. I will also draw on my years of experience working directly with artists and with institutions to illustrate the level of responsibility and caretaking that goes into organizing and preserving your archival legacy—which means going through materials folder by folder, box by box, digital file by digital file. Undertaking this work can be extremely challenging. But the reward of managing your archival legacy is without a doubt worth the effort.

Just take a breath and go one step at a time. You can start by considering the following three core questions:

- » What kind of story are you interested in telling through your archival history?
- » What is your capacity as an individual to do this work?
- » What are some of the ways forward to creating and maintaining your archives?

## Dream Big

Just look at all that stuff. Several boxes in a corner that you have been meaning to sort through. Professional records: your contracts, written and email correspondence, check stubs, and receipts



that need to be organized and filed. Your timed-based documentation and recordings on VHS tapes, CDs, and thumb drives, and cloud-based storage of projects and performances that need to be transferred and inventoried. Not to mention your artwork: sketchbooks, renderings, paintings, prints, digital art, photographs, three-dimensional works, and installations. Kept in the attic, basement, closet, garage, storage space, and studio. There it is, all piled up and waiting for someone to box it up and maybe throw it away.

Dear artist, you are not alone, and your situation is not unique. Typically artists create and exhibit their art repeatedly throughout their careers. Some stop and start. But most artists go from project to project filing or boxing away professional materials generated from the last project while simultaneously starting a new one. These boxes feel burdensome. While they do take up space, most importantly they contain items that make up your personal and professional legacy. They help to tell the story of your life as an artist.

Many people store these boxes wherever they can. Unless the boxed items are germane to the current project, they are often left alone until the day you retire. Or you might start digging through these boxes to find a contract or to locate items in order to prepare for a career-advancing opportunity, such as an artist talk, publication, survey or retrospective, when you need to find specific items to aid in organizing your materials for the opportunity.

Sadly, and most frequently, these archival assets come into focus because an artist has recently passed away, and their estate needs to figure out what to do with all that stuff. With all of this in mind, engaging in the career documentation process will benefit you in many ways:

1. You'll know the materials that make up your archive, where it is all located and its condition.
2. You're prepared for opportunities because your inventory will be more readily available to you.
3. You'll develop systems and routines for completing daily tasks.

In the end, you get to self-determine your archive. You are the author and its architect. This chapter is meant to walk you through a structural framework for organizing your archival legacy.

Here you will find best practices to organize and preserve your physical and digital archives, including how to build an organizing strategy that aligns with your artistic practice, and supplies you with other useful tips. The worksheets provided at the end of this chapter are designed to help guide you through your journey and will prove useful as you take active control of your archival legacy. Just remember that however you decide to document your work, keep it simple, be consistent, and write down your rationale and strategy.



# Getting Started: Mapping Your Legacy

## Where Is Your Stuff?

This is probably the easiest part of managing your collection, which is simply getting the project started. Let's briefly define a few terms in order to understand the archival process overall. To help us, I cite the *Dictionary of Archives Terminology*, an online database used by archivists and non-archivists alike to define or refine their understanding of a term or concept<sup>1</sup>. Here I offer two concepts that are often used interchangeably:

- » A **collection** is a set of archival contents or (more commonly) materials assembled by a person, organization, or repository from a variety of sources.
- » An **archive** or **archives** is a collection of physical or digital ephemera of all sorts that is historic and static.

For the purposes of this chapter, I use *collection* as a set of items that comprise materials that are not organized or have minimal organization, and *archive* to involve the act of organizing a collection. When I refer to artwork, I will identify that material as such—*artwork*.

Most artists have amassed a collection, but few have taken on the responsibility of creating and managing an archive of their own. As you read this chapter, my hope is that you will be inspired to establish your own archive.

## What Is Archival?

Artists generate a lot of materials that constitute their collection. I've researched archival collections consisting of several boxes of materials and as little as one file folder. As you think about what you want to keep or discard, keep in mind the list and rationale below:

- » A comprehensive archive includes more than just a record of the artwork itself. Archives are often extensive catalogues of photographs, exhibition histories, documents, sketches, purchase records, and sales information.<sup>2</sup>

Notice that this list highlights items that lean toward the business aspect of an artist's career. I would also add:

- » Correspondence, diaries, journals, résumés, reviews and articles about the artist, and her/his/their writings, obituaries, memorial tributes, and ephemera.

In short, when assessing your collection, consider intentionally including items in your archive which provide the historical evidence that **tells your story**. There is no one way to do this, and there will be items that do not fall neatly into the two sections above. For example, you might have a box of exhibition catalogues for other artists, theater programs, ticket stubs for films, etc. These and other ephemera could prove invaluable when reminding yourself of the life you've led, the artist you are, and the artist circles you've moved in. With this essential documentation you are giving researchers a more complete view of your artistic life.

1 *Dictionary of Archives Terminology*, Society of American Archivists, accessed February 19, 2022, <https://dictionary.archivists.org/index.html>.

2 "Disrupting the Archive and Why It Matters to History," *Artwork Archive*, accessed February 19, 2022, <https://www.artworkarchive.com/blog/disrupting-the-archive-and-why-it-matters-to-history>.

# Location, Location, Location

Most often the three different places artists store their art and the material used to support or exhibit their art is in their apartment or home (this includes a garage or storage facility on their property), their studio, on consignment, or in storage. Taking stock of where everything is located is undoubtedly the exciting first step to securing your archival legacy.



## Your Apartment or Home

Storing your collection where you live is convenient, and it might be the only place you can afford to keep it.

Let's take a look at your living space. Where is your collection? Are the boxes or materials in a closet or several closets? Basement or attic? Maybe in a spare room. In the corner of the garage. Over the years, I've worked with many artists who have stored materials (including their artwork) anywhere there was space, including under their beds, which I wouldn't recommend unless you can protect the work in a hard plastic or sturdy metal box.

Use ["Worksheet: Stuff Everywhere," on page 67](#), to begin identifying the spaces in your home or apartment where your collection currently resides. Be specific. What is the state of your collection (e.g., loose pages, in folders, stored in containers, external hard drives?) What condition are the materials in: excellent, good, fair, fragile? Write it down.



## Your Studio

If you're not in your studio at the moment, use your imagination. Close your eyes and imagine the space. Your desk. Draft table. Desktop computer. A closet. Where is your collection?

Think for a moment. There may be things in boxes. Remember, you are the architect of this space. Between creating, working, exhibiting, traveling, etc., you shape(d) this space to do your work, and as a result, you store your collection wherever possible. The good news is that your collection and space can be transformed into an archive, a place that is easier to navigate and where your archival collection is accessible.



## Storage

I use storage as a catchall term to mean anywhere that is not your home or studio. What I find most common is that artists tend to store their collection materials in an independent self-storage facility. As an archivist, I've cleaned out many storage lockers, and the majority of them were small disasters. Boxes on top of one another, sagging and causing damage to the materials inside. Dust. Critters. Things you do not want to see when you open a box that's been unopened for months or years.

## Write Down Where Things Are Now

Most people have stuff everywhere. Everything is everywhere, or at least in places where there's space and even in places you might have forgotten about. Years pass and *where is that one box with all of my...?*

Take a moment to write down every place you have stored your artwork and the materials associated with your career as an artist—both physical and digital. Doing so can be instructive because later you can use this information to begin to map a strategy to inventory your work and create a comprehensive archive. Use “Worksheet: Stuff Everywhere,” on page 67 to assist you in this process.

## Your List Should Include Four Things:

### Location

- » Example: *home in the basement, studio closet, dad's house*

### Number of boxes, storage containers, or loose items

- » Example: *33 boxes, several posters, 2 old laptops*

### A general description of the collection

- » Example: *The Meta Warrick Fuller Papers consist of personal and professional papers, correspondence (1880s–1960s), subject files, estate papers, and diaries documenting aspects of the career of this important sculptor.<sup>3</sup>*

### Condition of the box/container, files, or archival contents

- » Example: *Several paper boxes were slightly damaged in a flood in the basement. There is mold on the majority of the file folders that hold original photographs. The plastic containers in the basement are in good condition.*

Once you've assembled this information, you are ready to move confidently into the next phase of organizing and creating a detailed inventory for each box/container or loose items.

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3 Meta Warrick Fuller Papers, Sc MG 395, Schomburg Center for Research in Black Culture, Manuscripts, Archives and Rare Books Division, The New York Public Library.

# Getting Ready: A Note on Preparation

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Here's a short list of items you will need to begin organizing your archive.

- » **File folders**
- » **Acid-free paper**
- » **Storage boxes and poster containers**
- » **External hard drives**
- » **Pencils and erasers**

It's necessary to have supplies on hand to assist you in the organizing process. Many of these items are relatively inexpensive. However, you probably already have many of these things in your home or studio. You may need to purchase storage boxes, which can be found at your local stationary store, moving companies, or even at storage facilities. You will also need external hard drives (at least two, but I would recommend three) to transfer your digital assets and make sure you have backups for them.

Just to be clear you can begin the inventory process without buying everything you need at the moment. My advice is to start organizing your collection immediately, and don't let anything get in your way. Organizing is an iterative process, a little today, a little tomorrow, and so on. Processing happens over time and depending on your schedule it can take weeks, months, and even years to prepare. And that's fine. That's part of the process. The main objective is to make organizing and documenting your artworks and records a part of your artistic practice.

## Getting Organized

Earlier we discussed your collection and where it currently resides. Consider this: whatever process you use to create your art can help you think through a workable process to begin organizing your collection as well as incorporating new items into your archive. For example, if you know that you typically create digital prints of your artwork for exhibitions, let's take a moment to examine your workflow. You know what you do.

After creating high-resolution images of your work for an exhibition and sending them off to your agent, gallery, or museum, what happens to them? Do you put the images in a file on your laptop or desktop? If so, how do you label your folders? Do you have a **naming convention for your art files**? Do you inevitably transfer these files to the cloud or to an external hard drive? For more on this, see [Chapter 7, "Managing Your Digital Image Assets," on page 89](#).

There are probably many ways you file things away. And then, like most artists, you move on to your next priority, project, and area of focus. Here's another way to think about it.

You create analog and/or digital files. You might put together a plan for an exhibition or some other project. This could involve writing grants, jotting down notes, research, printing out articles, and many, many phone calls and emails. As the project develops, you might print, sign, and execute contracts; work on a marketing or publicity plan; send e-blasts out to friends, family, and colleagues to attend your event. There might be leftover printed materials from the event. You take them home and leave them in a box over by the closet door. You say to yourself "I'll get to it soon." Months pass, the exhibition is over, and your artwork is returned to you. You're already working on another project or several projects. Materials you used for your past project are now in several places: in a box on

the floor, on your computer, maybe still on your desk. You need space for the new project, so you gather it all up and put it in boxes, and/or remove files from your computer and transfer them to a hard drive.

The point of this scenario is to track your patterns, reveal what you do regularly, and identify ways to gradually incorporate an archival habit into the organization and management of your artistic practice. Once established, it may prove useful to apply a similar strategy towards capturing the details of your creative process from ideation to production as a reflective method that builds in periods for critical self-examination.

Using the above scenario, let's consider it with a *career-documentation mind*. You create physical and/or digital files. **You label your analog and digital files using the same word or phrase so that they are easier to locate across all formats, platforms, and systems.** You *automatically* create and place your file(s) and other analog materials in a box specifically created for the project. Simultaneously, you save/migrate digital files to both your computer's file and an external hard drive. Everything you use to build your project exists in a box (the physical records), computer and external hard drive (the digital records). Before, during and after the project.

Materials created to promote the art project (the ephemera) are also stored during and after the project in the *corresponding box*. As your new project takes shape, you will have already instituted a practice that ensures you have tracked and stored your recent project to be incorporated into your archive.



### Tip: Regular vs. Archival Supplies

Many archivists recommend holding off on purchasing acid-free folders and boxes for the simple fact that regular office supplies can do the job. If there are items which need special care because they are fragile or rare documents, purchasing acid-free paper can help secure the item and slow the degradation process. For more information on identifying the archival quality supplies to support your specific organizational needs, see [Chapter 9, "Drafting a Preservation Plan," on page 107.](#)

# Mapping and Inventorying Artwork

This section focuses on simple ways to map your artwork, primarily physical items. Consider it a basic starting point for inventorying your artwork. The section augments what you have read earlier about locating your collection, and provides tips for getting organized.

After locating your artwork and designating a cool, secure space to store it, keeping track of your work is relatively simple. Begin to record the key identifiers of each work (e.g., title, media, dimensions, date of creation, etc.) in an inventory system that could be a spreadsheet or database.

An **inventory** is an organizational system for your artwork. It is not considered part of the archive because its status is subject to change—due to artwork being sold or given away and no longer part of the artist's collection.

In addition to the artwork and records you have in your possession, it is equally important to keep track of the artwork no longer in your collection, due to sales, donations, gifts, tradings, etc. Make sure to include the names and information for your collectors (museums, galleries, organizations, and people) in your inventory system.

It might not be possible to take a high-resolution photo of every artwork you've produced, but you can begin a practice of always having your work photographed going forward. A digital image can be attached to the spreadsheet or database record for the work. Having a high-resolution image readily available is an added bonus when you're engaging a possible collector or curator interested in a specific series of work. It is recommended to have both the inventory system and images stored in a backup external hard drive. For more information on inventorying your physical items and digital content, read the following chapters, [Chapter 6, "Creating an Artwork Inventory,"](#) on page 69, and [Chapter 7, "Managing Your Digital Image Assets,"](#) on page 89.



## Tip: Add Inventory Numbers to Artworks

It is recommended to add newly generated database Inventory Numbers to the physical artworks whenever possible. For example, using a Sharpie to jot down the Inventory Number on a stretcher bar will be very useful in identifying paintings in the future. Also related, acquiring pictures of the backs of artworks is integral to so much of catalogue raisonné research and documentation—signatures, markings, labels, stamps all provide the clues to the history of an artwork, so if you are able to take verso pictures of works before they leave the studio, it could be helpful to future scholars.





## What to Keep?

It can be challenging to decide what to keep in your archive. What you are essentially doing is *telling your story*. Consider what kinds of items best tell the story you want to share about your art and you.

With that in mind, adopt a policy/procedure that works for you. Just make sure that you are *consistent*. Remember: the point of doing all of this is to *retain* the digital assets, to *preserve* your digital assets, and if necessary, to *access* your digital assets.

Below is a listing of recommended items, analog and digital, that artists should save in their professional records.

- |   |   |   |
|---|---|---|
| » Administrative paperwork (invoices, receipts, etc.)                 | » Legal papers (including contracts, deeds of gift, consignment agreements, loan agreements, and or other proof of ownership of objects in a gallery or museum, patron's permanent collection, or wills and bequests) | » Phone message books   |
| » Appointment books/calendars   | » Notes, notebooks, to-do lists, etc.   | » Photographs, analog and digital   |
| » Audio/video materials   | » Personal and professional correspondence  | » Press releases, press clips (I recommend keeping two or three paper copies of each unless hi-res digital) |
| » Brochures and catalogues  |   | » Professional affiliations (awards, memberships, participation in special projects or networks)            |
| » Draft papers and/or proofs for publications                         |   | » Sketches  |
| » Exhibition and event documentation (postcards, posters, and flyers) |   |   |
| » Grant proposals   |   |   |

Consider creating a criteria for keeping analog or digital evidence that illustrates the development of your artistic practice and career. Think about how specific documentation illuminates your actions, decisions, financial and legal rights, and other aspects of your life as an artist. Ponder on how your archive will enhance your art practice, as well as build upon its research and informational value. And be mindful of duplicates. You do not need twelve copies of anything taking up space in your archive. Retain three copies of the item at the most.

## Securing Your Archive

When it comes to keeping your archive secure, I strongly suggest that you create a practice for keeping your passwords, physical locks, and security codes safe.

Some security companies offer good advice on best practices about such matters, such as:

- » changing your password or access code at least two to three times a year;
- » using ALL allowable digits when creating or changing your passwords or codes (be creative);
- » and finally, and most importantly, not using your birthday, age, or any easily identifiable information as your security code.<sup>4</sup>

Make it easy for you to get to your archive and impossible for anyone else to guess your password and/or codes.

<sup>4</sup> "How Often Should You Change Your Keycodes and Other Tips For Maintaining a Safe Keyless System," GoKeyless, accessed February 19, 2022, <https://www.gokeyless.com/blog/how-often-should-you-change-your-keycodes-and-other-tips-for-maintaining-a-safe-keyless-system>.

So it should go without saying that if you plan to store your archive in a studio or independent storage facility, make sure it is secured. You want your items safe and secure from not only fluctuating temperatures but to also protect your archive from possible theft. Along with the security concern, emergency access is important; in the event something happens to you, at least one other person should know the password. Make sure to disclose this information to at least one trusted person and keep them current in case anything happens. You can rest assured knowing that your life's work can still be accessed.

## Conclusion

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Now that you have taken the time to map your collection, the next step will be to put this information into an inventory/organization or tracking system that will work in tandem with your artistic practice. In some way you might consider this an art project that you are shaping and building, concurrently. As you begin building your inventory in a spreadsheet or database, after each session, save it and store a backup on an external hard drive.

On the following page is a worksheet that can help you get started. And most importantly, take your time. Inventorying your artwork and organizing your physical and digital documentation takes work and effort. But it is fundamentally one of the most useful things you can do to manage your artistic legacy. Creating and maintaining an archive is much like creating a piece of art. It takes thought and care and serves a purpose. It must be done in a way that works and makes sense for you and your artistic practice. As Toni Cade Bambara writes, "Not all speed is movement." As you do this work, keep it simple, be consistent, and write it down. Do yourself a favor and don't wait. Start now.

**Be a Witness.**

**Be Accountable.**

**Be Your Own Archivist.**

## Worksheet: Stuff Everywhere

Where is your collection? If it's in your living space, is the material in an attic, basement, closet, garage, or spare room? Use this worksheet to begin identifying what it is, where it is, its condition, and add a sentence or two about what's in the box/container or specifics about the item.

[illegible]



For more than eight years, Los Angeles–based archivist Virginia Allison-Reinhardt has worked for private art entities, wedding archival best practices with collections management. The methods she's developed are useful in identifying and preventing common missteps when developing a robust inventory management system for artworks and related activities. In this chapter, Virginia shares how to future-proof your legacy by creating an adaptable framework for organizing and actively managing your artwork inventory records.

Materials in the studio of CALL Artist Ted Kurahara.  
Photo by Shervone Neckles-Ortiz.



# Creating an Artwork Inventory

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BY VIRGINIA ALLISON-REINHARDT




Artists manage their artwork inventory, contacts, bibliography, and exhibition history to support an active studio practice throughout their careers. These tasks can be unwieldy or arduous, and are often neglected as other timelier production activities take precedence. Leaving inventory management and related digital asset management tasks to “someday” can be costly and time-consuming the longer this essential work is deferred.

Crafting a well thought-out inventory management plan ensures that the artist is building an authoritative system that meets their current and future needs. Doing so will allow the artist to capture vital detailed information required to support their career on a timeline in step with their studio’s natural rhythms and available resources. These protocols may be implemented by the artist and/or an assistant, such as a legacy specialist, registrar, archivist, or studio manager.

# Overview of Inventory Management Systems for Artists

Your arts inventory management system is the single source of truth regarding your artwork and will serve as a directory for all activities related to each work. Your website, social media posts, publications, gallery records, and correspondence may all pull from the details stored in your artwork inventory system. Your arts inventory management system can provide critical information to galleries, museums, collectors, storage facilities, and institutions. There are three types of inventory management systems you may choose to employ; selection will depend on your financial and time-based resources. The “[Worksheet: Inventory Management Planning](#),” on page 85, provides prompts to assist in mapping out your resources and inventory management system criteria.

## Three Inventory Management System Options

 <b>Paper-Based Systems</b>	<p><b>Paper-based systems</b> such as index cards or a notebook are a great way to get started without any technological barriers. Index cards were used for art inventory systems before the computer. However, this format can be restrictive, making it difficult to fully capture the details of your work. Creating a digitally accessible inventory will save you a lot of time in communicating information about your work and will professionalize your practice.</p>
 <b>Spreadsheets</b>	<p><b>Spreadsheets</b> created with software you most likely already have such as Microsoft Word/Google docs, Microsoft Access, or Microsoft Excel/Google Sheets are widely used information management tools. These tools are considered “flat” and are therefore incapable of running robust searches or furnishing reports with specified information and images about your collections. While thumbnail reference images can be uploaded into these programs, they are restricted to the confines of the document and may not meet your needs. For artists just getting started, this is a quick and easy option for recording inventory information.</p>
 <b>Inventory Management Databases</b>	<p><b>Inventory management databases</b> built specifically for artists are software applications that may be purchased from a vendor as a stand-alone product that you install on your computer or as a subscription that can be accessed online through your browser. These solutions are available off-the-shelf and will be ready for you to populate as soon as you purchase them. For studios with more complex needs, a customized inventory management system may be built to your specifications with programs such as FileMaker Pro, Microsoft SQL Server, or CollectiveAccess.</p>



## The Case for Choosing a Database

- » Efficient data entry. A rule of thumb with relational databases is that the same data is never entered twice or **DRY: Don't Repeat Yourself**.
- » The ability to upload relevant PDF documents for easy reference to an artwork record such as condition reports, installation instructions, loan agreements, press, and/or conservation reports
- » The ability to create customized PDF reports displaying records of your artwork (thumbnail images with their correlating information) to be accurately and quickly disseminated to gallerists, collectors, museums, and print publications. They allow for the storage of mostly textual information, with low-resolution reference images.
- » The ability to conduct complex searches for specific information based on any of the descriptive (metadata) fields, retrieving the exact data you need. Once the search is run, you can save the records to a record group for easy access and/or print the results as a PDF report. **For example, you can use the search mode of a database to find and create reports for the following queries:**
  - » artworks currently on commission with a specific gallery and their total values
  - » artworks sold to a specific collector or on loan to a specific institution
  - » “available” artworks from a specific series
  - » artworks missing critical data such as dimensions, images, year created, etc.
  - » thematic fields such as “subject,” “keyword,” or “color” that help you see your work in a new way.

Depending on the database and your financial/technical resources, you may be able to integrate your inventory management system with an Application Programming Interface (API) that can share your artwork collection images and selected metadata to your website.



### Tip: Image Storage

Although most databases and even spreadsheets can hold reference images of your artwork, you should keep and organize your hi-res images outside of your inventory system on a computer or hard drive. See [Chapter 7, “Managing Your Digital Image Assets,”](#) on page 89, for detailed instructions on managing digital assets.

## Anatomy of database systems:



### Tables > Records > Fields

**Tables** contain sets of data about an artwork, exhibition, or contacts.

**Records** are individual data items stored in a table.

**Fields** (metadata) store information related to each record. Individual pieces of information that make up a record are placed in fields, the equivalent of the blank lines that must be filled in on a paper form. Fields can hold text, keywords, numbers, and dates.

**Object fields** hold low-resolution images and PDFs for reference purposes.



### Searches

**Searches** or **queries** can extract information from the inventory database. A search will pull information based on a record such as “year created.” Advanced Searches can pull together a group of records such as all paintings at a particular storage location.



### Forms

**Forms** represent paper records and simplify data entry by using lookup tables and dropdown menus.



### Reports





**Reports** are a means to export the results of a search based on a particular query; they provide a clean, formatted layout with which to digest that information.

Adapted from *Museum Registration Methods*, 5th edition, ed. Rebecca A. Buck and Jean Allman Gilmore (Washington, DC: The AAM Press, 2010), 163.

# Inventory Management Foundational Elements

Your inventory management database can be very simple or very complex. Outlined below are three basic tables and correlating records/fields and field types (text, numerical, calendar) you may want to consider including in your inventory management system: Artworks, Exhibitions, and Contacts. The tables listed below link record and field data together to create a robust system in a relational inventory database or can stand alone in Microsoft Word, Excel, or Access.

## Consider including records for four foundational categories in your inventory management system:

			
<b>Artworks</b>	<b>Exhibitions</b>	<b>Contacts</b>	<b>Bibliography</b>
Anything you have created with artistic intent (paintings, prints, sculptures, drawings, collages, video, photography, performance, etc.)	Exhibition history detailed in your CV with each exhibition linked to the artworks included	Information related to your network of artists, curators, galleries, dealers, collectors, and staff	Track writings about your work including exhibition reviews.

For a detailed breakdown of each of these foundational categories and the essential records and fields to include in your database, see the section on “Fields” beginning [page 79](#).



### Tip: Use Controlled Vocabulary

For certain fields, a drop-down menu with a predefined list (controlled vocabulary) is recommended if using a database. This is called a “controlled vocabulary” and keeps the language consistent so that multiple variations of a term aren’t applied to the like items. It also saves time when creating a record as users don’t have to “think”; they can just select the appropriate field and move on to the next field.

Example of a controlled vocabulary set for an item format:

- |                                     |                                       |   |
|-------------------------------------|---------------------------------------|---|
| <input type="checkbox"/> Book       | <input type="checkbox"/> Illustration | <input type="checkbox"/> Painting       |
| <input type="checkbox"/> Ceramics   | <input type="checkbox"/> Installation | <input type="checkbox"/> Performance    |
| <input type="checkbox"/> Collage    | <input type="checkbox"/> Jewelry      | <input type="checkbox"/> Photograph     |
| <input type="checkbox"/> Digital    | <input type="checkbox"/> Mask         | <input type="checkbox"/> Print          |
| <input type="checkbox"/> Drawing    | <input type="checkbox"/> Metalworks   | <input type="checkbox"/> Sculpture      |
| <input type="checkbox"/> Fiber      | <input type="checkbox"/> Mixed Media  | <input type="checkbox"/> Textile        |
| <input type="checkbox"/> Film/Video | <input type="checkbox"/> Mosaic       | <input type="checkbox"/> Wood           |
| <input type="checkbox"/> Furniture  | <input type="checkbox"/> Mural        | <input type="checkbox"/> Works on Paper |
| <input type="checkbox"/> Garment    | <input type="checkbox"/> New Media    |   |
| <input type="checkbox"/> Glass      | <input type="checkbox"/> Other        |   |

# Inventory Numbers (Unique IDs)

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A core function of an inventory management database is to create an Inventory Number (Unique ID). Each time you create a new artwork, a new artwork record will be created along with an Inventory Number (Unique ID) in your inventory management system. This is similar to creating a new row in Excel that is given a number in the left-hand column.

Maintaining your own Inventory Number (Unique ID) system will afford you greater control over your own physical inventory.

Inventory Numbers help track the artwork's provenance, location, and transactions as the artwork goes out in the world. They are also used to link any related digital assets to the artwork by embedding the related artwork's Inventory Number (Unique ID) into their filenames.

The sole purpose of a meaningless Inventory Number (Unique ID) is to provide you with a unique number to assign to your artwork. Your inventory management system will count the number of artworks/records in your inventory, you don't need to worry about having the Inventory Numbers correlate with the date your artwork was created.

## Best Practices for Inventory Numbers

### Inventory Numbers (Unique IDs) work best when:

- » they are four digits to ensure they are not misread by machines that often read binary numbers as coding or a script to complete a function.
- » they are meaningless and not representative of any attribute of the work, e.g., do not incorporate the artwork year as there is a separate data field for the artwork year.
- » they begin with 1000 rather than 0001. It's easier to recognize, and padded zeros can be unpredictable. (Some applications will automatically strip out the padded zeros, so 0001 becomes just a one-digit number.)
- » you don't have to think about them, and they don't have meaning.
- » they are not alphanumeric. Alphanumeric formulas create complications in the records.

If you already have an alphanumeric inventory numbering system that works for you, that is ok—you can manually enter this field as you have done and have the meaningless Inventory Number serve as a secondary “control number” rather than a Unique ID.

### What if your gallery or storage system assigns artworks with their own Inventory Numbers?

Consider adopting and managing your own inventory system so that you are not reliant on a third party to have more authoritative control over your inventory than you do.

It can be useful to create a field in your database to note Inventory Numbers being used by your gallery or storage provider so that you can cross reference your inventory for accuracy and quickly troubleshoot any discrepancies.

## Your Inventory Number (Unique ID) has a big job.

Your Inventory Number (Unique ID) will be generated in your inventory management system and used to label digital assets and documents that will refer back to the artwork record for more information, such as:

- » Images, videos (images based digital assets)
- » Artwork labels for packages, crates
- » Condition reports
- » Sales receipts
- » Storage inventory reports
- » Correspondence with galleries and museums

## Identify Your Inventory Management Resources, Criteria, and Storage Needs

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Knowing your financial, time, and labor resources for both initial and repeating costs will help you understand what kind of inventory management system to adopt. Keep in mind that updating your inventory system in real time (or as close as possible) is crucial to ensure the integrity of information about your artworks. See the worksheet at the end of this chapter to establish your short-term and long-term budget. Also visit [Chapter 4, “Budgeting for Your Inventory Practice,” on page 39](#), for more information on ways to integrate an inventory management system expense into your overall studio operational budget.

### Off-the-Shelf (Proprietary) vs. Customized Databases

Your inventory management system can be established with an off-the-shelf, ready-to-use inventory management database designed for artists, or it can be customized via information relational databases such as FileMaker Pro, Microsoft SQL Server, or CollectiveAccess. A customized database may be required to meet the specific needs of your practice. A database developer who understands fine art collections management is needed to implement a more customized solution. It will also be important to create a user's manual for the customized database that explains how to use your system.

As of this writing there are several off-the-shelf inventory databases available for artists at various price points. Searching Google with keywords such as: “artist” + “inventory management software” + “art collection” + “studio” should retrieve a list of the most current and widely used inventory management software applications. When selecting an inventory management product, don't just rely on vendor testimonies. Talk to your peers and colleagues to get anecdotal feedback on the various inventory management systems to ensure you are hearing unbiased user reviews.

Consider using the [“Worksheet: Inventory Management Planning,” on page 85](#). The worksheet will help you factor in your financial resources and time available to invest in a system. Most inventory management systems for artists offer a free demo and trial that will help you to make a full evaluation, and you may preview popular inventory management databases for artists on YouTube.

## Data Migration to a New Inventory Management System

If you are migrating your inventory management data to a new software system, be sure to create a backup of your database before you begin, remembering to export your data as a CSV/Excel file. You will use the spreadsheet to upload your data into your new database management system. Just as moving artwork exposes it to damage, migrating data puts it at risk. Build in some time to run test searches and reports for quality control once you have imported your inventory data into your new system. This will ensure that all your data has moved into the new system correctly. To mitigate risk of data loss or corruption, some software companies offer fee-based services and will migrate your data into their system so that you don't have to.

## Backups and Data Integrity: The 3-2-1 Rule of Digital Preservation

Data about your artwork holds equal importance and value to that of your artwork. Take precautions to save your intellectual property periodically by following this workflow:

- |  |  |   |
|--|--|---|
| <b>1 Backup your database to a spreadsheet</b><br>(CSV/Excel file) | <b>2 Make a copy of the database file</b><br>(if hosted on-site vs. cloud) | <b>3 Save your copies on more than one device, in more than one location, in case of disaster</b> |
|--|--|---|

This task is as simple as clicking a button and exporting your data to a CSV/ Excel file and quickly saving it to a few locations.

Cloud storage and external hard drive storage of backups are considered the most archivally sound and secure way to preserve your data. As your inventory system grows, your cloud data space can be expanded as needed. It is recommended to also backup your data to an external hard drive and store it in a different geographic location from your computer (in case of natural disaster). Ensure that you have enough space for several backups before purchasing an external hard drive. External hard drives formatted to store terabytes of data should provide most artists with ample storage space and are now relatively affordable. Artists with large files that need more robust storage management may find that they need to use resilient IT storage systems. These systems consist of storage media contained within a server that provides built-in resilience to various failure modes by using inbuilt redundancy and recovery (i.e., RAID drives = redundant array of inexpensive disks).

For more information on these storage systems see the Digital Preservation Coalition's *Digital Preservation Handbook* chapter on Storage: <https://www.dpconline.org/handbook/organisational-activities/storage>. More about digital preservation is discussed in Chapter 7, "Managing Your Digital Image Assets," on page 89.



# Establish Your Inventory Management Workflow

You may find it helpful to return to the activity sheets completed in the previous chapters on Goal Setting and Work Planning to support your long- and short-term goals, clarify your intentions, and prioritize your tasks for building and maintaining a comprehensive and sustainable inventory system for your studio.

Once you have an inventory management system in place, your inventory goals can be outlined and implemented into an efficient workflow.

## INVENTORY STEP 1

### Know What Artworks You Have Created

You may approach your artwork inventory records management process in several ways. It can be helpful to work backwards, starting with your most recent artworks. Your CV will help you populate the exhibitions records.

When conducting an inventory audit, which is recommended every few years at least, and every year at most; you may start with a location using your locations map also mentioned in [Chapter 9](#), “Tip: Create a Studio Manual,” on page 109.

## INVENTORY STEP 2

### Know Where Your Artworks Are

Update the location for each artwork in your inventory management system as needed. Be sure to include works on loan/consignment and works that have sold in your inventory system. Your inventory can be a single source that reflects all artworks you have created regardless of their status. You can make placeholder records for works that don't have images or are missing critical data such as title or location.

## INVENTORY STEP 3

### Know When You Create Inventory Records, Who Is Doing It, Where, and How Often

Once you have an inventory system in place, it will be important to establish a workflow and schedule for how and when to enter your data into the inventory system. Find ways to integrate data entry into your studio routines and cycles; such as when you create a new body of work, preparing for an exhibition, or around set times in a year (every three to six months). Make sure you have the equipment, tools, and your devices set up to inventory the work. If your inventory will take place at a storage facility, ensure your database is installed on a laptop with VPN access (if hosted on a server). If your system is browser-based, ensure that the storage facility has Wi-Fi access or that you get a hotspot device so that you can access your database online to update your inventory in real time.

## INVENTORY STEP 4

### Take Care of Both the Data and the Physical Object

Work from your record to your object, not your object to your record.

- » Create a record in your inventory management database first; that will provide you with an Inventory Number (Unique ID), then you can begin entering data into the system about the object/artwork. You can also retrieve relevant information from the inventory management database that you may want to affix to the object/artwork and/or its housing.
- » If using an inventory management database, it will automatically create an Inventory Number (Unique ID) for every work in your collection. You can create your own Inventory Numbers by using padded sequential numbers if you don't have a database. Example: 0001, 0002, 0003.
- » This Inventory Number (Unique ID) will be incorporated into the File Naming Conventions you adopt in your digital asset management plan to ensure your information system is correctly and accurately linked to your digital assets.
- » Create a label for your artwork and its package, if necessary, that includes the artwork's Inventory Number (Unique ID). If you are filling out a brief condition report (for older works), ensure the report has the Inventory Number (Unique ID) as well.
- » Do not move on to new artworks until the group you are working with is stable, meaning the inventory record's location and condition is updated and the artwork is appropriately labeled, packaged, and returned to its storage location.
- » Never allow an artwork to leave your studio if it is not linked to a record in your inventory management system with a proper label that includes your Inventory Number (Unique ID) affixed to the artwork.
- » Always cross reference third-party inventory paperwork (shippers, storage facility) with your inventory management system when artworks are shipped out to ensure everything is correct.

## INVENTORY STEP 5

### Document Your Artwork

If you do not already have photo documentation of your work, consider photo documenting it as you enter information about the artwork into your inventory management system.

Low-resolution images of your artwork may be uploaded to your inventory management system as part of your inventory workflow.

If high-quality images cannot be obtained, a snapshot will do and may serve as a placeholder.

If you are taking the images yourself, ensure you transfer images off your camera to your computer and back them up as soon as possible to avoid data loss.

Chapter 7, “Managing Your Digital Image Assets,” on page 89, will discuss how to set up a workflow to manage, organize, and preserve your digital image assets.



## Fields in an Artwork Record

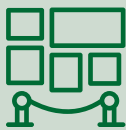
Records	Fields
<b>Inventory Number (Unique ID)</b>	A numerical Inventory Number (Unique ID) is assigned automatically by your digital inventory system. Ideally four digits, not representative of any attribute of the work, e.g., do not incorporate the artwork year as there is a separate data field for the artwork year. Begin with 1000 rather than 0001. It's easier to recognize and padded zeros can be unpredictable. (Some applications will automatically strip out the padded zeros, so 0001 becomes just a 1-digit number.)
	Gallery ID (optional). Galleries often apply their own unique identifier to your work to help them navigate their own inventory system. Entering their Inventory Number into your system if known can help to cross-reference your inventory if the relationship is active.
	Storage ID (optional). Fine Art Storage Services often apply their own unique identifier to your work to help them navigate their own inventory system. Entering their Inventory Number into your system if known can help to cross-reference your inventory if the relationship is active.
<b>Title</b>	Important to note exactly how you want your artwork title to be produced. If grammar is not standard, make sure to detail this preference in the notes field so a well-meaning colleague or gallerist does not correct your spelling and/or formatting.
<b>Series</b>	Label artworks that were meant to be considered part of a series. This allows for you to quickly navigate to all artwork records related to one defined series. Drop-down menu recommended here.
<b>Type of Art</b>	Label as painting, print, drawing, sculpture, photograph, maquette (controlled vocabulary that should be customized to your body of work and clearly defined). Drop-down menu recommended here.
<b>Date(s) Created</b>	YYYY-YYYY or YYYY. Some artists prefer to provide a range of when the work was made, others only include the year the work was completed. Do be consistent.
<b>Number of Parts in Work</b>	Helpful to ensure all parts of a work are present during inventory audit or shipping/receiving artwork.



<b>Exhibition Copy</b>	Some artists create “exhibition copies” essentially copies of original artworks, for exhibition loans if the original is too fragile to ship or if the original artwork is damaged. It is extremely important to track exhibition copies in a separate record from the original artwork. The exhibition copy will be physically and intellectually tracked such that its location, history, and ID number does not get mistaken for an original artwork down the line. This field can be free-form text and can explain the situation under which the copy was made. Information can be actively updated here and may state if the copy was destroyed, returned to the studio, or still in circulation.
<b>Dimensions</b>	Use the standard order Height (H), Width (W), and Depth (D). Data will be more useful if you have H, W, and D in separate number-designated fields as opposed to text fields. If you have multiple objects for one work of art, you will want to account for the dimensions of each object in the artwork. Also indicate if the work is framed, and if so, the framed dimensions. Databases will allow you to enter your imperial dimensions and will auto-convert them to metric so that inches and centimeters are listed in your record and you never have to second-guess your math.
<b>Materials</b>	A list of the materials used to fabricate your artwork will ensure the work can be properly cared for by other custodians and better understood for its intrinsic and/or scholarly value. Primary materials should be listed first. A controlled vocabulary list of materials from which you can select multiple items is recommended here as you will want to consistently use the same terms for materials so that your entire body of work can be more readily understood. Drop-down menu recommended here, with option to select all that apply.
<b>Location</b>	Include all places you identified in your storage map for the most accurate record-keeping: third-party storage, gallery storage, gallery if on consignment, home and/or studio location(s), etc. Drop-down menu recommended here.
<b>Status</b>	Sold, consigned, gifted, storage, on loan, destroyed. Drop-down menu recommended here.
<b>Signature</b>	A signature affects the value of your work; it's important to note if the work is signed or not. May also use this field to note if a certificate of authenticity was created for the work.
<b>Notes</b>	If you and/or staff are inputting a ton of information in the notes field, this is known as “unstructured data.” Unstructured data is necessary but can become wildly inefficient over several years. If multiple staff members work with your inventory, have them date and initial any notes they add to the record so you can check with them regarding any questions.



<b>Editions</b>	<p>Create a record for each edition or create another table to capture edition information for each edition in a print run. Identify edition number, location, and status (sold, consigned, etc.) for each edition rather than treating the work as a whole. Do include information about the printer/fabricator, and production information from the documentation sheet in this table or in each record (or link to fabrication/production field). Use edition sentences to reflect edition number/entire edition run.</p> <p>Examples:</p> <p><b>AP 2/2 + 3 Ed</b> refers to AP2 (the second artist proof) out of the entire print run which is 2 Artist Proofs + 3 editions.</p> <p><b>Ed 1/3 + 2 AP</b> refers to edition 1 out of the entire print run which is 3 editions + 2 Artist Proofs</p> <p>Note: Tracking prints in databases requires time and special attention to ensure it is done properly and consistently. If printmaking or editions are a part of your practice, pay close attention to how they are represented in the inventory database selection process. You want to find a way to represent the entire print run including BATs, trial proofs, artist proofs, editions, etc. For more information on printmaking annotations, see International Print Center New York, Glossary of Terms, <a href="http://ipcny.org/glossary">ipcny.org/glossary</a>.</p>
<b>Provenance</b>	<p>Ownership history: important for tracking authenticity of your work.</p> <ul style="list-style-type: none"><li>» City, state, country</li><li>» Collection</li><li>» Collector (link to contacts)</li><li>» Year acquired</li></ul>
<b>Transactions/ Financials</b>	<p>Transaction type (gallery sale, auction, gift/donation, direct sale)</p> <ul style="list-style-type: none"><li>» Transaction date</li><li>» Sale price</li><li>» Amount due to artist</li><li>» If artwork was gifted, did you pay taxes on the gift? (amount, date)</li></ul>
<b>Value</b>	<p>Insurance value estimate, including price history (date, who assigned)</p>
<b>Installation Instructions</b>	<p>Instructions on how to best care for and install your work. The more details the better.</p>
<b>Fabrication/ Production</b>	<p>Details about fabrication/print house, production costs, details about materials used and production process.</p>
<b>Reference Image(s) of the Work</b>	<p>Reference image of the work. (If you are working with a paper-based system, a quick reference sketch can be helpful).</p>



## Fields in an Exhibition Record

Records	Fields (type)
<b>Exhibition Title</b>	(free text)
<b>Location</b>	(city, state, country)
<b>Dates of Exhibition</b>	DD-MM-YYYY - DD-MM-YYYY (calendar)
<b>Traveling Dates, Locations</b>	(free text) Include dates; city, state, country
<b>Institution</b>	(free text)
<b>Group or Solo</b>	(checkbox or radio button)
<b>Curator(s)</b>	(link to contact(s) record from contacts table)
<b>Documentation</b>	<p>Checkmark if documentation includes:</p> <ul style="list-style-type: none"> <li>» Exhibition catalogue</li> <li>» Press release</li> <li>» Announcement</li> </ul> <p>Drop-down menu recommended here.</p>
<b>Works Included</b>	Link to all artwork records that were included in the exhibition, which allows the artist to create an exhibition report (checklist) that includes thumbnail images, Inventory Number (Unique ID), and caption information such as title, creator, date(s) created, dimensions, medium, etc.
<b>Notes</b>	(free text)





## Fields in a Contact Record

Records	Fields (type)
<b>Name</b>	(First name, Last name)
<b>Phone Number</b>	(xxx)-xxx-xxxx (numerical)
<b>Email</b>	(free text)
<b>Website/Social Media Handle/Hashtag</b>	(free text)
<b>Address</b>	(free text)
<b>Affiliation</b>	Link to contact record
<b>Type of Contact</b>	(collector, gallerist, conservator, etc.) Drop-down menu recommended here (controlled vocabulary)
<b>Notes</b>	(free text) May include how you met, what work they are interested in, etc. May link to exhibition table, provenance, or transactions.



## Fields in a Bibliographic Record

Records	Fields (type)
Type/Format	(exhibition catalogue, review, interview, anthology, editorial) Drop-down menu recommended here (controlled vocabulary)
Year Published	YYYY
Author(s)	(Last name, First name)
Editor(s)	(Last name, First name)
Book/Catalogue Title	If applicable
Article Title	If applicable
Magazine/Journal	If applicable
Website Address	If applicable
City	(free text)
Publisher	(free text)
Volume	(number)
Publication Issue/Edition	(free text) Adaptable for how individual publications frame their issues, by year, month, or season, e.g., Spring; Oct 2012; 1999
Page(s)	(numbers)
Formatted Citation	A database can take the information from these fields and formulate your entries into a <i>Chicago Manual of Style</i> (or other format you choose, such as MLA) bibliographic citation, and can place each citation in chronological order.



### Tip: Bibliography Development

As you develop your inventory management system, consider building a bibliography module that documents the relationship of the published materials to the artwork itself (i.e., naming which artworks were mentioned or reproduced in the article or book). Curators and researchers are interested not only in which exhibitions an artwork was included, but also about how that particular artwork has been written about and reviewed; if a database is able to link a particular painting to the bibliographic record, this aspect of the artwork's history is much easier to keep current and accurate.

# Worksheet: Inventory Management Planning

The following planning templates will walk you through the steps of planning out your needs for an inventory management system. Your plan may evolve as your studio needs progress. However, establishing a well-documented plan will allow you to quickly pivot and adjust any moving parts as needed.

## 1. Establish Your Inventory Management System Criteria

What is most important for you and your studio? Use the template below to establish your wish list.

Suggested Database Selection Criteria May Include:		Your Criteria:
<ul style="list-style-type: none"><li>» Training and support available</li><li>» Skill set of staff</li><li>» Number of simultaneous users</li><li>» Inventory artwork capacity/limitations</li><li>» Online vs. browser-based software</li><li>» Compatibility with your computer's operating system</li><li>» Customizable, to what extent</li></ul>	<ul style="list-style-type: none"><li>» Art world—experienced founders</li><li>» Operating history</li><li>» Compelling mission</li><li>» Data migration services</li><li>» Positive reviews from peer artists</li><li>» Provides tables for the following categories of information: artworks, exhibition history, contacts</li></ul>	

## 2. Evaluate Your Top Three Systems

Google search “art inventory software for artists” to retrieve the most current inventory management database software recommended for artists. Using the criteria you identified above, select your top three systems and engage in the free trial to see if the system will meet your needs. Record the trial login information and systems below along with any concerns and questions you may have. Use your notes to engage with the vendor sales representatives before you decide on a product.

Your Top Three Systems	Trial Login Information	Notes
1.		
2.		
3.		

### 3. Identify Your Budget

A full view of your start-up and ongoing expenses as well as the time and resources required to implement and manage your inventory system will allow you to make an informed decision when choosing your inventory management software.

	Software & Hardware		Labor
	Initial fees	Ongoing fees	# assistant/consultant(s) + hours per week/rate
Inventory Management System (example entry)	\$ 300	\$ 300 annually (includes upgrades, support)	1 consultant, 10 hours per week @ \$45/ hour= \$450
Inventory Management System (paper-based, Microsoft product, or database)	\$	\$	
Developer (if custom built)	\$	\$	
Data Migration	\$	\$	
Training	\$	\$	
External Hard Drive or Server	\$	\$	
Cloud Storage Space	\$	\$	
Laptop, Computer(s)	\$	\$	
<b>Total Costs</b>	\$	\$	

## 4. Put It All Together: Draft Your Inventory Management Plan

Once you have identified what inventory management system you will be working with, think about how you will integrate inventory management practices into your studio routines.

Inventory Management Plan		
<b>How often will you update your inventory?</b>	<input type="checkbox"/> Every time I create a new body of work <input type="checkbox"/> Every exhibition cycle	<input type="checkbox"/> Once every three months <input type="checkbox"/> Other <hr/>
<b>Who will update the records?</b>	<input type="checkbox"/> Me <input type="checkbox"/> Assistant/associate (how many)	<input type="checkbox"/> Family member(s) <input type="checkbox"/> Other
<b>Project estimated budget</b> <i>(refer to budget template on previous page)</i>	Equipment & Supplies: Initial fees: <hr/> Ongoing fees: <hr/>	Labor: [# of staff/consultant(s)] x [hours per week] x [estimated rate]: <hr/> <hr/>

## 5. Assess

Adjust your workflow as needed, commit to following through with your inventory management goals, and revisit your plan as often as needed so that it is serving you.

### Your Inventory Management System Should Be Able to Address the Questions Listed Below. Put Your System to the Test and Adjust as Needed.

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>» Do you have consistent information relating to your artworks in your inventory management system? (title, date, medium, dimensions)</li> <li>» Can you produce a report with the locations of all the artworks in your collection?</li> <li>» Do you know what artworks are currently on loan, consignment, exhibition?</li> <li>» Can you produce a checklist of works for each of your exhibitions?</li> </ul> | <ul style="list-style-type: none"> <li>» Are there artworks for which you don't have good photographic images/documentation?</li> <li>» Did you backup your database to a spreadsheet (CSV or Excel file)?</li> <li>» Have you made a copy of the database file and stored it on more than one device, in more than one location?</li> </ul> |
|---|--|

Continuing from the previous chapter on creating an artwork inventory, archivist Virginia Allison-Reinhardt shares an overview of digital assets associated with artists' practices, as well as methodologies for keeping these assets organized, retrievable, identifiable, and preserved through a digital asset management plan.

Desktop display of File Structure Hierarchy and external media.  
Photo by Melissa Dean.





# Managing Your Digital Image Assets

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BY VIRGINIA ALLISON-REINHARDT

Just as artists actively manage their collections and inventory, they also manage digital assets such as images and videos. Establishing a methodology for approaching digital asset management will assist you in efficiently locating and retrieving documentation of your work.

## What Are Digital Assets?

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Digital assets are content-rich files created electronically. Image-based digital assets (such as TIFFs, JPEGs, QuickTime videos) are ubiquitous to artist studios. They are important to actively manage as they maintain authority for an artist's works and can service the artist's legacy, yet are highly susceptible to risks in the form of bit rot, technical obsolescence, human error, and lack of proper organization.

Due to the format-specific needs of managing digital images and videos, this section will focus on managing the artist's image-based digital assets archive. Managing image-based digital assets takes place outside of the artist's inventory management system. However, the Inventory Numbers (Unique IDs) numbers from your inventory system may be used in filenames for digital assets to reference their designated artworks record.

# Establishing a File Structure Hierarchy and File Naming Convention

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A digital asset management plan saves you time and aggravation by creating a standardized series of replicable tasks for organizing your content-rich data (workflow). If applied consistently, you will always be able to locate and retrieve the digital assets you need. The cornerstones of a digital asset management plan are an established File Structure Hierarchy and a File Naming Convention.

- » **File Structure Hierarchy:** simply a file folder map pointing to where your digital assets are located.
- » **File Naming Convention:** incorporates the Inventory Number (Unique ID) generated from your inventory management system. The Inventory Number (Unique ID) is the link that connects the digital asset to your inventory database artwork record.

See the “[Worksheet: Digital Asset Management Planning](#),” on page 95, to get started in crafting your digital asset management plan.

## STEP 1

### Create a File Structure Hierarchy

A File Structure Hierarchy arranges folders in a logical and meaningful way, in order to organize digital assets for each of your collections. Establishing a File Structure Hierarchy enables you to consistently know where to save your files and where to find them.

Your digital image archive will track individual photographs of your artworks as well as exhibitions. Artworks are best organized within these two categories by year created and collated by their image size. A general rule of thumb is to save images in three consistent sizes that may be stored in separate corresponding folders.

- |  |  |  |
|--|--|--|
| » <b>Highest quality TIFF file</b> (archival copy of your images, should not be worked on or touched). Save to “high-res-tiff” folder. | » <b>300 dpi JPG file</b> (available to share for publications, galleries). Save to “high-res-jpg” folder. | » <b>72 dpi low-res JPG file</b> (for uploading to website, social media, email) Save to “low-res-jpg” folder. |
|--|--|--|

Outlined on the following page is a sample File Structure Hierarchy that would allow you to share folders of artwork images based on the year they were made or by the exhibition where they were shown. If the creation of an artwork spans more than one year, images should be placed in the year the work began or the year it was completed. (This is up to you, but do be consistent.)

If working with a professional photographer, they may automatically supply you with high-resolution TIFFs, high-resolution JPEGs, and low-resolution JPEGs. Your TIFF images are your preservation files and should not be touched. Be aware that re-saving images or uploading them to social media may cause compression to your image files which cannot be undone. Before working with an image, copy it locally. Do not work with your TIFF files directly, these are your archival preservation copies. Most data corruption happens during file transfer or resizing. **Compressed files can’t be restored to their original resolution.** Uncompressed files are best for the preservation of digital assets.




Your Digital Images Archive Collection folder may include sub-group folders for each year you have been actively creating and exhibiting artworks.

## Sample File Structure Hierarchy for Image Archive


### **Artworks**




Individual images of artworks created that year, organized by title of artwork

Further organized by image size:





- »  High-res TIFF (preservation copy)
- »  High-res JPG
- »  Low-res JPG


### **Exhibitions**




 **Installation images:** installation shots of the exhibition, collated by image size if available

- »  High-res TIFF (preservation copy)
- »  High-res JPG
- »  Low-res JPG

 **PR:**

- »  Checklist from gallery
- »  Checklist from studio
- »  Press release, digital announcement
- »  Press

 **Artworks:** individual images of artworks included in exhibition (these will be duplicated in your top-level artworks folder)

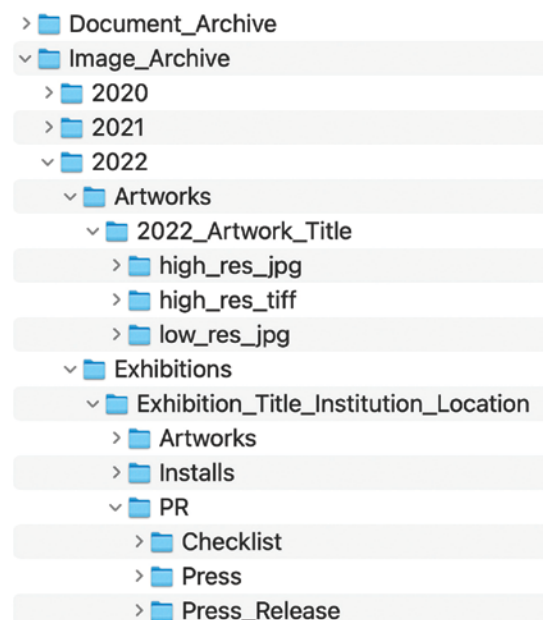
- »  High-res TIFF (preservation copy)
- »  High-res JPG
- »  Low-res JPG



### **Tip: File Nesting**

A common term that represents a subfolder is “nest.” This simply refers to the action of placing a file within a file. In the example to the right, individual Artwork folders are nested in the Artworks folder which is nested in the Image Archive folder.

Your digital documents archive will track all “born-digital” documents you receive or create. Consistently placing files in your folder structure hierarchy will make it easy to navigate between working files and reference files that are not used every day but need to be accessible.



## STEP 2

### Create a File Naming Convention to Label Your Digital Assets

The Inventory Number (Unique ID) created in your inventory management system for each artwork record may be used to label image- and text-based digital assets. Files with a strong naming convention provide a codified description of the content and are organized in a logical way. They allow you to preserve context and rights (important descriptive metadata) with the image or video asset for quick reference.

Most files will begin with a date—YYYYMMDD if a document, and YYYY if an image. This allows files to sort chronologically and can help with version control. If you would like to clearly label working files with the version number, the common convention is to append the version number to the end of the file, e.g., v1, v2, v3. Working images or progress shots should not be placed in the final Image Archive Folders.

Some useful resources for designing a File Naming Convention are on the UC Davis Data Management page, which offers lists of free applications that will assist with bulk file renaming or the ASCII Sort Order Chart. You can find links and other helpful resources in the “Reference Materials,” on page 159.

#### When creating your File Naming Convention, keep the following tips in mind.

- » Keep a list of photographers and when they have shot your work so you will be able to map back to the full photo credit. Ideally, you should create a table in your inventory management database to do just that, but you may also place a note in your image files for each artwork and/or exhibition if this better suits your needs.
- » Do not use spaces or other special characters such as: `! # $ % & ' @ ^ ` ~ + , . ; = ) (`  
Not all computer operating systems will consistently read these characters as text and may mistake them as commands, thus corrupting the file. If needed for clarity, anywhere you would normally use spaces you can use hyphens (-) and/or underscores (\_) instead.

Consider using a bulk file renaming application in order to efficiently rename your files to match your filing convention (doing so one at a time will quickly lead you to abandon this project). The UC Davis Data Management page lists free bulk file renaming options: <https://www.library.ucdavis.edu/service/research-data-services/describe-2/>. You may also do this using Adobe Bridge if you already have it. For more, see “Sample File Naming Conventions for Artists,” on page 99, at the end of this chapter.

### What is Metadata and Why Does it Matter?

Metadata refers to context or information describing an artwork or digital asset. Simply put, metadata is information that documents the contextual activities of creation and use for any given data point such as a digital asset or even an artwork. In Chapter 6, we saw how to preserve the metadata for an artwork in an inventory management system. This chapter will provide an overview of metadata that you may want to capture in relation to your digital images (what it is, where it is, when it was created, what the title is, where it was shown, who created the photograph, what type of file it is, etc.)

Digital image metadata may be administrative (rights and access information), technical (file size, resolution, compression), or descriptive (title, exhibition, creator, location, photographer). Preserving this contextual information along with the image is the main difference between simply “backing up” and “archiving” your digital images. This chapter provides steps for establishing a digital asset management plan resulting in a documented series of replicable tasks for organizing and preserving your digital images and their context.

### A Note About DAMS

Digital Asset Management Systems [DAMS] such as Widen or Resource Space can provide solutions for active artists’ studios whose image-based digital files continually proliferate and overwhelm their infrastructure. Enterprise DAM software allows for higher levels of security, metadata, rights management, sharing, storage, and version control, but can be time-intensive and cost prohibitive. DAMS are often utilized by content-rich organizations, design agencies, and institutions.

Creating a documented plan for managing your digital assets is essential regardless of whether a Digital Asset Management System (DAMS) is used, and greatly aids studios by addressing where and how assets are saved and preserved. If your studio has a well-executed asset management plan in place and still has the need for more complex image- or video-based asset management and risk mitigation, see the DAM related information in the [“Reference Materials,” on page 159](#), to get started.

## Manage Digital Asset Collections in One Container

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Digital assets are best managed when kept together on one platform. You may accomplish this by pulling all your assets together in one container. If your images from a particular year or exhibition only exist on a CD or USB drive, they could become lost, damaged, or obsolete due to the changing nature of technology. These separate, individual drives may also create a barrier for immediate access. Consider using your computer or server to organize and access your images in a central location. You may also use both a cloud storage service and external hard drives for backups and redundancy of your image archive.

See [“Sample Workflow to Manage Your Digital Assets in One Container,” on page 98](#), to accomplish this.

# Digital Preservation

Managing digital materials is not a one-time effort. Digitizing analog materials does not automatically mean that they have been preserved. In order to ensure you are preserving your digital assets, it's necessary to incorporate protocols that will provide continued access. This is how you future-proof your legacy.

## 3-2-1 Rule for Digital Preservation

Redundancy is vital for digital preservation. The 3-2-1 rule advises us to keep three copies of our digital files on two different types of media with one copy off-site. This best practice helps ensure that your data is safe from physical disaster, theft, or damage and that at least one type of media will be readable should the storage device become obsolete.

Cloud-based storage services will provide access to all your files online and can automatically back up your files from your computer at a rate you choose to set (automatically, daily, weekly, monthly). The “cloud” is a term for an indeterminate number of servers storing your data such that it is accessible via the Internet. Clouds are convenient, but you are surrendering some measure of control to the service provider. Longevity issues and security concerns mean that the cloud is not a sufficient way to solely preserve your data, however used in conjunction with external hard drives it can be an effective way to store images. It is crucial to learn how to export your data from whichever cloud platform you may choose so that you can back it up.

Migrate digital assets on external hard drives to new storage media every five to seven years (well before the device becomes obsolete). Consider labeling your external hard drive with an expiration date so you will remember to replicate it on new storage media. Your digital asset management plan should include a schedule to spot-check media on your devices thus ensuring your digital assets are still readable.

**Copy 1:** Full set of photos saved on a hard drive in your computer or on a dedicated server (for daily access)

**Copy 2:** Full set of photos saved to an external hard drive in a separate location from Copy 1 (stored in an antistatic bag to prevent bit-rot, access as needed)

**Copy 3:** Full set of photos saved to a second external hard drive, or if using the 3-2-1 rule you may consider backing up your images to a cloud storage service so that your digital assets are saved in at least two different technological storage formats.

## Recommended Preservation File Formats

Image and document digital asset formats have different sustainability factors. Rich Text Format or HTML files “play well” with other types of software as opposed to proprietary software file types (e.g., Microsoft Word docs).

The following are recommended preservation file formats:

TIFF (images)

XML (structured data)

Wave (audio)

PDF/A (documents)

HTML (web pages)

QuickTime (video)

You've got this! As you begin to craft and implement your digital asset management plan, allow your plan to evolve as your needs evolve. Revisiting your digital asset management plan periodically will enable you to successfully ensure your artworks and pertinent documentation are accessible, retrievable, and preserved, thus supporting your career and legacy.



# Worksheet: Digital Asset Management Planning

## 1. Identify

What you are saving, how often, where, and who is doing it. Once you have established this, you may wish to create a workflow outlining what steps are taken to manage your digital assets and by whom.

**What kinds of digital files are you managing? How much space are they taking up?**

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**What devices are you backing up your files to? Where are they located?**

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**Who will be responsible for the initial setup of your digital asset management plan and ongoing maintenance?**

Copy 1

---

Copy 2

---

Copy 3

---

**How often will you spot-check your backup devices to ensure your files are readable? Who will do it?**

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---

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**When do your external hard drives need to be replaced? Who will migrate the data?**

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**If an artwork was created over more than one year, in which year folder will you file the work?**

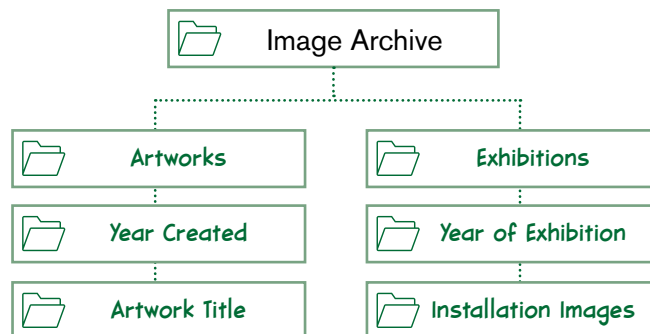
- ☐ In the year the work began
- ☐ In the year the work was completed

## 2. Arrange

Use the following File Structure Hierarchy arrangement grid to intellectually organize your image archive. You do not need to fill in every field: depending on the nature of your work and organizing logic, categories will vary.

Adapt this arrangement to create your own File Structure Hierarchy. Post your File Structure Hierarchy where you can refer back to it and work with this arrangement for a few weeks to see if it captures your needs.

### Example



### Create Your File Structure Hierarchy



### 3. Craft

Craft your File Naming Conventions as needed. Post where you can refer to it and work with this arrangement for a few weeks to see if it captures your needs. Refer to “[Sample File Naming Conventions for Artists](#),” on page 99 for more.

#### Images:

*Elements may include:*

- » Date(s) created
- » Creator
- » Inventory Number (Unique ID)
- » Artwork title (omit articles: a, the)
- » First initial, last name of photographer

#### Extensions:

- » Detail (det)
- » High-res (hr)
- » Low-res (lr)
- » Installations (install)
- » Image Number (so filenames are not redundant)

#### Press:

*Elements may include:*

- » YYYYMMDD
- » Publication
- » Interview-or-review
- » First 3 words of the article’s title
- » Author’s first letter of first name + last name

**Order your preferred File Naming Convention for each file type below, and any clarifying usage notes:**

#### Artworks

Example: YYYY\_Artist\_UniqueID\_ArtworkTitle\_Photographer\_det\_lr\_##

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#### Exhibitions and Installations

Example: YYYY\_Artist\_ShowType\_ExhibTitle\_Venue\_Photographer\_det\_lr\_##

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#### Press




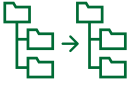

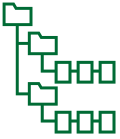

Example: YYYYMMDD\_Publication\_ArticleType\_ArticleTitle\_Author

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### 4. Assess

Test the system for a few weeks to ensure that things are working properly and as expected with your asset management plan. Keep in mind that your plan may evolve as your studio practice evolves. Revisit your plan annually to ensure that it is clear, concise, and actionable. The most important part of this practice is documentation and consistency.

## Sample Workflow to Manage Your Digital Assets in One Container

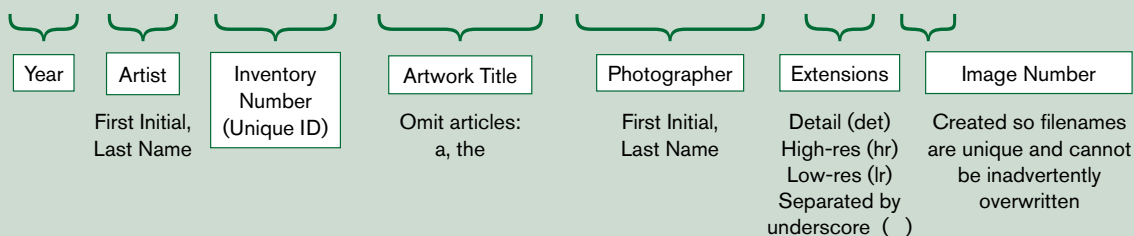
 <p><b>Gather</b></p>	<p>Gather all external devices where digital images and videos may live. Go through your studio and home and collect all USB drives, SD cards, CDs, external hard drives, and photo albums from your phone.</p>
 <p><b>Copy</b></p>	<p>Copy all image-based digital asset files from external devices to one folder on your computer labeled “Image_Archive” or “Document_Archive.” Ensure all data is uploaded to a centralized storage container such as your computer or a dedicated server.</p> <p>Try not to include duplicate files—you want the highest quality resolution files available in your image archive. Use reports generated from your inventory management system to ensure you have images for every work you have created. If you have a lot of work, break down the reports by year.</p>
 <p><b>Capture</b></p>	<p>Capture volume and file type. Record the amount of data and the types of files you are managing so that you can get a sense of the amount of storage space you’re currently using and may need in the near future for continued centralized digital asset management.</p>
 <p><b>Replicate</b></p>	<p>Manually replicate your File Structure Hierarchy; you will have this mapped out after working through the planning templates at the end of the section. The File Structure Hierarchy mirrors how you will create and nest folders. Your folders will soon be populated with your digital assets. Keep a printed copy of your File Structure Hierarchy close by your computer to guide you through this process so that you don’t have to rethink each step when you want to file or look for your digital assets.</p>
 <p><b>Sort</b></p>	<p>Sort your files into the appropriate Sub-Collections and series folders.</p>
 <p><b>Process</b></p>	<p>Process each series to the file-level (nested folder). Don’t worry about renaming files at this point, simply adopt your File Naming Convention moving forward. If you can go no further than to separate digital files into the intellectual arrangement that you identify (File Structure Hierarchy), and you do so on a consistent basis, your records will be organized in such a way that they can be retrieved and interpreted by those who may inherit them. If time and resources permit you may rename your files using a bulk file renaming tool.</p>
 <p><b>Schedule</b></p>	<p>Schedule time for periodic digital asset management upkeep. It is wise to sort, file, and label images at the same time you are creating new records in your inventory management system. This could be every time you have a new body of work for an exhibition, or every three to six months depending on your production and exhibition cycle.</p>

# Sample File Naming Conventions for Artists

## Artworks



**YYYY\_Artist\_UniqueID\_ArtworkTitle\_Photographer\_det\_lr\_###**



Artwork Filename Examples:

*Low-res file-level folder:*

2019\_LVincent\_10581\_Afterbloom\_JGranger\_lr\_01  
2019\_LVincent\_10581\_Afterbloom\_JGranger\_lr\_02  
2019\_LVincent\_10581\_Afterbloom\_JGranger\_det\_lr\_03

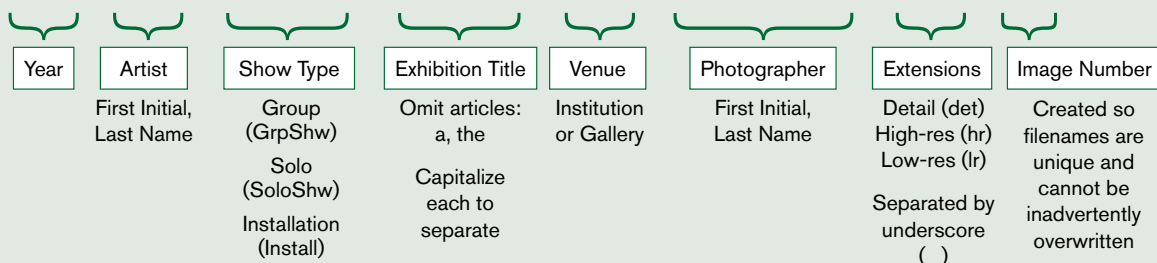
*High-res file-level folder:*

2019\_LVincent\_10581\_Afterbloom\_JGranger\_hr\_01  
2019\_LVincent\_10581\_Afterbloom\_JGranger\_hr\_02  
2019\_LVincent\_10581\_Afterbloom\_JGranger\_det\_hr\_03

## Exhibitions/ Installations



**YYYY\_Artist\_ShowType\_ExhibTitle\_Venue\_Photographer\_det\_lr\_###**



Exhibition Filename Example: 2019\_LVincent\_GrpShw\_RiverBend\_TreeMuseum\_JGranger\_lr\_01

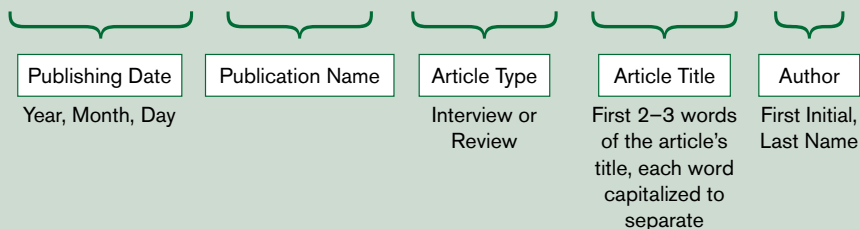
Installation Filename Example: 2019\_LVincent\_Install\_Bloomsong\_SouthCityPark\_JGranger\_det\_hr\_02

## Press



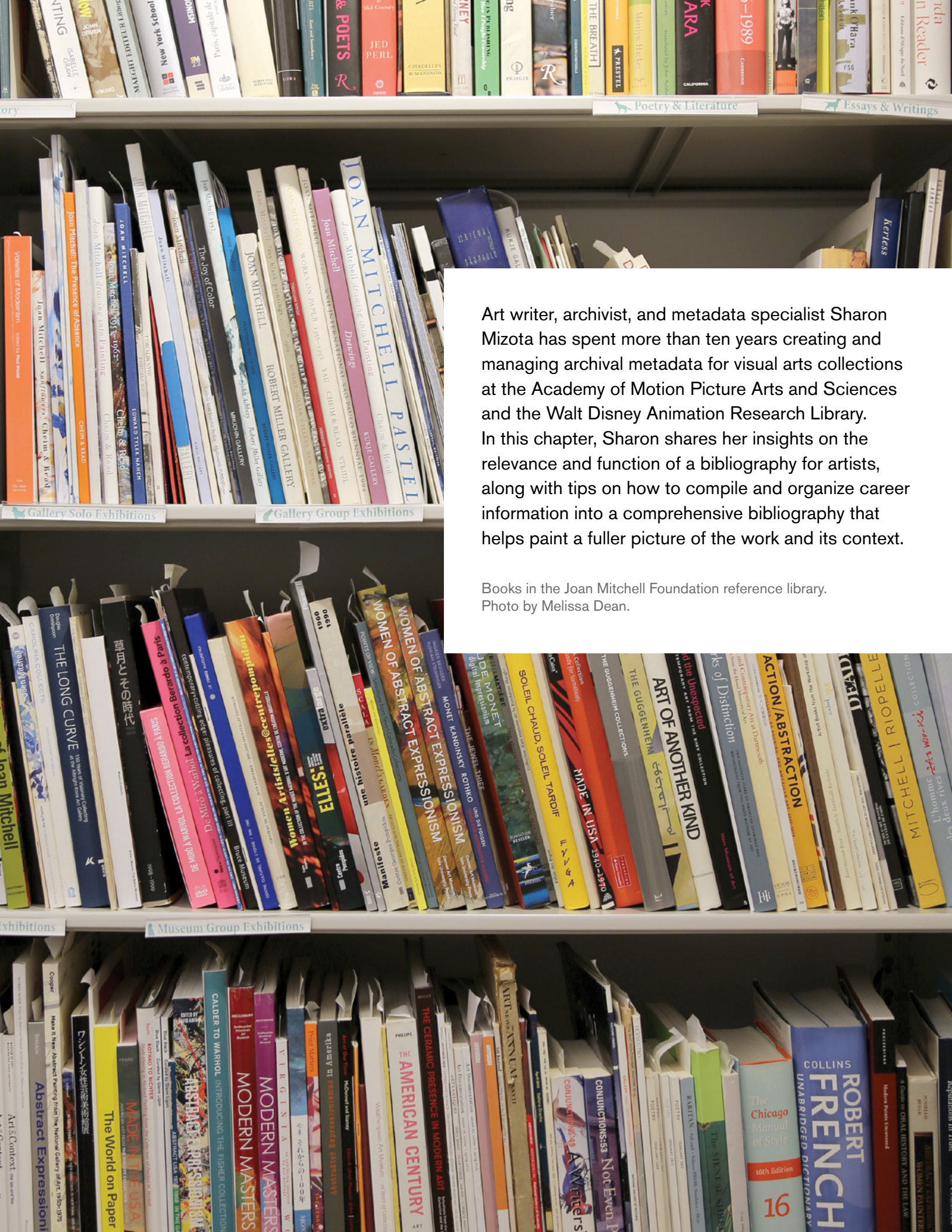
File Naming Conventions can be used to capture metadata for your document files as well. Here is an example File Naming Convention for saving press and reviews.

**YYYYMMDD\_Publication\_ArticleType\_ArticleTitle\_Author**



Press Filename Example: 20151124\_Surface\_Interview\_InspiringInstallations\_MDashcan





Art writer, archivist, and metadata specialist Sharon Mizota has spent more than ten years creating and managing archival metadata for visual arts collections at the Academy of Motion Picture Arts and Sciences and the Walt Disney Animation Research Library. In this chapter, Sharon shares her insights on the relevance and function of a bibliography for artists, along with tips on how to compile and organize career information into a comprehensive bibliography that helps paint a fuller picture of the work and its context.

Books in the Joan Mitchell Foundation reference library.  
Photo by Melissa Dean.



# How to Create Your Bibliography

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BY SHARON MIZOTA

For an artist, a bibliography serves as a resource about you and your work that can be easily shared with curators, journalists, researchers, and others. It is simply a list of books, articles, or other resources that includes enough information for a reader to find and access them. It establishes the notability of your work and career—that others have found it important enough to write about—and situates your work in a larger cultural conversation and context. In the early stages of your career, a bibliography can help demonstrate that your work is relevant and important; in the later stages, it can serve as a useful research tool, providing evidence of sustained interest and engagement with artistic ideas and issues over time.

## What Publications Should I Include?

Any published material about you or your work or written/created by you can be included in a bibliography. Examples include books, exhibition catalogues, reviews, journals, newspaper or magazine articles, blog posts, documentaries, news media, online videos, etc. Basically, any content that has been produced and distributed for public consumption is considered a published work.

That said, you probably shouldn't include things like calendar mentions or exhibition announcements, where the main reason for the publication is to promote an event. These announcements typically don't include substantive content about or reactions to your work.

You may also choose to leave things out. For example, if there are many articles written about your work, you may want to include only the most prominent or detailed. If there are reviews you would rather not circulate, you don't have to include them. In such cases, it's best to acknowledge these omissions by titling your bibliography "Selected Publications" or "Selected Bibliography."

## What Information Should I Include?

Your bibliography should include enough information about each item for the reader to be able to find the publication themselves. This information generally includes author, title, place of publication, publisher, and date of publication. For online resources, it may also include a URL and an access date. (As online content is sometimes taken down, it's important to document when the online resource was last known to be available.) For bibliography materials that reference individual work(s) of art, it is recommended to list each work with the corresponding page number(s) on which the work is discussed, illustrated, or both. Also see "[Worksheet: Bibliography](#)," on page 104, for examples on ways to create your own bibliographic entry.

## How Should It Be Organized and Formatted?

If your bibliography is relatively short, you can organize it as a single list, ordered alphabetically by the author's last name. However, if your bibliography is quite long and includes many different types of resources, you might consider breaking it into sections by resource type—books, articles, online media, etc.—and then ordering items alphabetically by the author's last name within each section.

There are many systems for formatting bibliographic entries. Formatting refers to the order, type style (bold, italic, etc.), and punctuation for each piece of information about the publication. Best practice is to pick one system and use it consistently. This way, anyone reading your bibliography will have the same information, presented in the same format, for every entry.

Two of the most common guides for formatting bibliographic entries for art publications are *The Chicago Manual of Style* and the *Modern Language Association Handbook*. These style guides address almost every kind of published media and are too detailed to include here. Free, condensed guides to both, including online citation tools, can be found at the Purdue Online Writing Lab, [https://owl.purdue.edu/owl/research\\_and\\_citation/resources.html](https://owl.purdue.edu/owl/research_and_citation/resources.html).

## Example of a Publication Entry

Bernstock, Judith E. *Joan Mitchell*. New York: Hudson Hills Press, 1988.



## How Do I Update and Maintain It?

Ideally, a bibliography should be updated whenever a new, relevant publication appears. However, if your work is much written about, this may not always be practical. It's a good idea to at least make a note of new publications or to keep copies of them with their publication information in a single, centralized location, such as a folder, box, or computer directory. Then, schedule a regular time (monthly, quarterly, etc.) to go through the items and update your bibliography.

The easiest way to store your bibliography is in digital form, as a word processing document, such as Microsoft Word. A digital file can be more easily edited and updated than a paper document. (Just make sure you are running regular backups of your digital files!) You may also want to look into a reference management app like Zotero, Mendeley, or Papers, which can help you collect and keep track of publications and generate a preformatted bibliography on the fly. Following is a Bibliography Worksheet to help you get started. It includes examples for common resource types formatted according to *The Chicago Manual of Style*.

# Worksheet: Bibliography

Use this worksheet as a basic template for your bibliography according to *The Chicago Manual of Style*. Examples of each of the most popular types of sources are provided for reference.



## Books

**Last name, First name. *Title of Book*. Place of publication: Publisher, Year of publication.**

Example: *Bernstock, Judith E. Joan Mitchell. New York: Hudson Hills Press, 1988*

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## Newspaper and Magazine Articles

**Last name, First name. "Title of Article." *Title of publication*, Date of publication.**

Example: *Solomon, Deborah. "In Monet's Light." New York Times Magazine, November 24, 1991.*

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## Online Sources

**Last name, First name. "Title of Article." Name of Publication or Website, Date of publication or access date if publication date is unavailable. URL.**

Example 1: Szalai, Jennifer. "Ninth Street Women' Shines a Welcome New Light on New York's Postwar Art Scene." *New York Times*, September 26, 2018. <https://www.nytimes.com/2018/09/26/books/review-ninth-street-women-mary-gabriel-lee-krasner-elaine-de-kooning-joan-mitchell.html>.

Example 2: Roberts, Sarah, and Katy Siegel. "A Conversation about Joan Mitchell." Yale University Press Blog, February 12, 2021. <https://blog.yalebooks.com/2021/02/12/a-conversation-about-joan-mitchell/>.



## Audiovisual Sources

**Last name, First name. *Title of Work*. Directed or Performed by First name Last name. Original Release Year; City, State: Studio/Distributor, video release year. Medium.**

Example 1: Cajori, Marion, dir. *Joan Mitchell: Portrait of an Abstract Painter*. 1992; San Francisco, CA: Arthouse Films, 2016. Kanopy Streaming.

Example 2: Handel, George Frideric. *Messiah*. Atlanta Symphony Orchestra and Chamber Chorus, Robert Shaw. Performed December 19, 1987. Ansonia Station, NY: Video Artists International, 1988. Videocassette (VHS), 141 min.





LaStarsha McGarity is the Andrew W. Mellon Objects Conservation Fellow at the National Gallery of Art and a PhD candidate in preservation studies at the University of Delaware. In this chapter, she discusses the process of developing a preservation plan for both your artwork and your physical and digital records, guiding you through the process of drafting a preservation plan that suits your studio practice and communicates your long-term intentions for the preservation, conservation treatment, documentation, and exhibition of your life's work and career.

CALL Artist Marcos Dimas. Photo by CALL Legacy Apprentice Megan Pasko.



# Drafting a Preservation Plan

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BY LASTARSHA MCGARITY

## What Is a Preservation Plan, and Why Is It Important?

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A preservation plan provides structure, accountability, and a shareable guide for the future care and maintenance of your body of work. By documenting the current condition and future care of your oeuvre, you are creating an organized, replicable information resource. Your preservation plan can be used to apply for grants and to provide documentation of the professional management of the collection, as well as help collectors, future caretakers, and borrowers understand the collection's specific needs. A preservation plan also records the environmental conditions of storage areas.

Your preservation plan should include artworks and associated materials, such as concept drawings, images, a bibliography, digital records, and other related ephemera. Documenting, caring for, and maintaining a body of work can be incredibly resource intensive and can vary wildly in terms of complexity. I encourage you to use [“Worksheet: Preservation Plan,”](#) on page 121 of this chapter, along with the activity sheets you previously completed in [Chapter 2, “Worksheet: Long-Term Goal Setting,”](#) on page 21, and [“Worksheet: Short-Term Goal Setting,”](#) on page 22, as well as [Chapter 3, “Worksheet: Develop a Work Plan,”](#) on page 34.

Together these worksheets will help you to clarify your intentions and define what you want to achieve through your preservation plan; whether that is to prioritize your tasks or to identify and apply your resources accordingly. As you develop your plan, you may encounter areas of your studio practice that require immediate attention and resources. Keep in mind, this is part of the process and supports your efforts to put an actionable preservation plan in place for your work.

## Four Reasons Why a Preservation Plan Is Important:

### Sharing Information

Who are the stakeholders that have benefited and will benefit from your work in the future? Family and community? Museums? Galleries? Future caretakers of your collection? Many collections and museums have programs to support the arts in their surrounding communities through artist-in-residence programs, refocused acquisition plans, and exhibition spaces that highlight the creative abilities in their region. Museums are redoubling their efforts to uphold preservation to present the most accurate version of your work possible. Curators and collectors are eager to understand the technical aspects of art production and want to know the preservation needs of an artwork during the acquisition process. Your preservation plan allows you to document your story in your own words and remove any guesswork regarding your artistic intent and future preservation goals. The plan can be useful to conversations about exhibitions, publications, grants, and other opportunities.

### Defining Your Artistic Intent

Artistic intent is how an artist wants their work to be perceived by viewers and what they define as acceptable levels of change for their work. Your intent will likely differ for each work, each type of work, and over the course of the preservation plan. When documenting an artwork (title/dimensions/medium/year) consider adding a few lines to communicate your artistic intent for its preservation. It can answer important questions such as: Are components interchangeable? Is the fading of a color okay, or does it alter the meaning of your work?

### Maintaining Your Artwork Inventory

Your preservation plan is a good place to include an instruction manual or user's guide to your artwork inventory (see [“Tip: Create a Studio Manual” on page 109](#)). Start by organizing your artwork inventory and be gentle with yourself, as often disorder must precede order during this stage. Include information on where the master inventory can be found, and how electronic formats are accessed. Provide cataloguing standards for data entry with definitions of terms that are specific to your techniques or collections. Make sure it is clear what information you'd like to see recorded in the inventory—such as artistic techniques, materials, handling and installation instructions. For more information on this, see [Chapter 6, “Creating an Artwork Inventory,” on page 69](#).

### Documenting the Condition of the Artwork and/or Collection

A condition examination will allow you to determine and document the current condition of a work and should serve as a comparable record in the future. Consistent formatting and terminology are key to making condition reports useful. Works need to be examined carefully, and you may need tools, such as a magnifying glass or small flashlight, to better see the condition. The condition of an object can vary greatly depending on materials, process, age, and environmental factors. Inherent vice—condition issues caused by the chemical makeup of the object or its components—particularly plagues plastics and other contemporary materials. Artworks in “new” or “excellent” condition may not require many condition notes but care should be taken to document the materials used in their creation as soon as possible to avoid misinformation or omitted information.

### Other Key Considerations:

Is it often loaned? Do you use it to teach? Is it meant to be interactive? Works that are referred to, or circulate most often should be made as accessible as possible. Using the inventory you created, organize the artworks into categories based on these criteria. A storage map can accompany this section if it aids in locating works in high circulation or usage.

Different materials require different solutions for the best preservation. The packing, storing, and documenting of the works depend on the specific materials used in their creation. What strategies have already worked for your collection? Do you need to update your strategies?



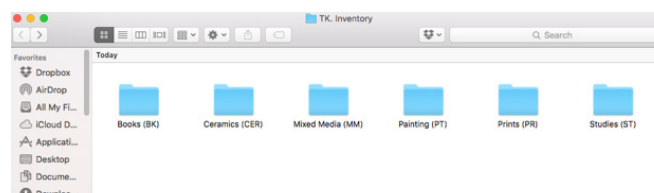
Develop a studio manual that outlines where things are located, and how they are organized in your studio, storage spaces, and on the computer and hard drives. This could be created using many different formats: drawn floorplan/map, written or typed guide, screenshots of your filing and inventory system.



Inventory: Excel files – separated by media.

Folders:









- Books (BK)
- Ceramics (CER)
- Mixed media (MM)
- Painting (PT)
- Prints (PR)
- Studies (ST)







Above are sample pages from artist Ted Kurahara's studio manual, which includes a studio map and locations of digital inventory information.

**See the list below and the list of common condition issues on page 127 for examples of basic information to include while examining and documenting the condition of the work.**

You will notice the information needed to conduct the examination may already exist within your master artwork inventory. To maintain consistency and accuracy of the artwork information across all systems, make sure to use your artwork inventory to inform the assessment process while you document the condition of the work, using the “[Worksheet: Condition Report](#),” on page 126.

 <p><b>Title of the Work and Year It Was Produced</b></p> <p><i>Untitled</i> is perfectly fine! Is it part of a series? Are there multiple creation years? A re-fabrication year? A conceptual year?</p>	 <p><b>A Brief Description of the Work</b></p> <p>For example, is the work a painting from the “Flight” series, a 3D print, or a carved bowl? Are there collaborators? Manufacturers? Fabricators?</p>	 <p><b>Medium</b></p> <p>Be as specific as possible in this section. Is there a ground? Varnish? Are there multiple materials? Is the work digital? Any hardware or software?</p> <p>PAINT → ACRYLIC PAINT → LIQUITEX ACRYLIC PAINT</p>
 <p><b>Handling Considerations</b></p> <p>Is it fragile? Are there hazardous materials? Is it heavy? Is it unevenly weighted? Are there multiple components that disconnect? Are there sacred components?</p>	 <p><b>Condition</b></p> <p>Does it appear as you intended? Is it stable? Can it be exhibited in its current state?</p>	 <p><b>Common Condition Issues</b></p> <p>After identifying the type, does it have a common issue like a stain? Is it warped? Are there cracks? Has it discolored? Is it dusty?</p>
 <p><b>Condition Notes</b></p> <p>What other things would you want someone else to know about the work? Are there expendable components like light bulbs or fuses?</p>	 <p><b>What Is the Artistic Intent? How Much Change Is Acceptable?</b></p> <p>How did you or the artist intend this work to look and to age? What change is acceptable? Fading? Re-fabrication?</p>	 <p><b>Who Completed It, and What Is Their Role in Relation to the Artist or Collection?</b></p> <p>Who are you and what do you do?</p>





**Prioritize how and in what order materials are to be preserved.**  
**Suggested criteria to consider:**

 <p><b>Use</b></p>	<ul style="list-style-type: none"> <li>» Can the work be transported with minimal risk of damage?</li> <li>» Is potential damage part of the work?</li> <li>» Will the work be exhibited?</li> <li>» Has it been exhibited before, and is it a key work in your career?</li> </ul>
 <p><b>Condition</b></p>	<p>Consider the condition of the work. Do any of the works require conservation treatment and/or restoration? It can be helpful to first consult with a local curator, registrar, and/or collection manager. If it is determined that the work needs conservation treatment/restoration, seek out a trained conservator. Conservators are bound to a code of ethics that respects your artistic intent; they will not obscure your original work or attempt to redo the work without your express input and direction. Do you have documentation of the work? This will help the conservator understand your process and the condition issues of the work. See <a href="#">“Reference Materials,” on page 159</a>, for conservation resources.</p>
 <p><b>Value</b></p>	<p>Value can be assessed financially by an appraiser but a financial assessment is not necessary to the preservation plan. Value in the plan is instead defined by a work's value to the understanding of your artistic growth, documented changes in your artistic process, and its content. The most important valuation is how the work contributes to your narrative and artistic legacy.</p> <p>For the criteria list:</p> <ul style="list-style-type: none"> <li>» Is this work representative of a shift in working practice?</li> <li>» Is it your favorite?</li> <li>» Does it hold sentimental value?</li> <li>» Is it important in the narrative of your artist practice?</li> </ul>
 <p><b>Budget</b></p>	<p>Budgetary limitations mean balancing the best storage materials available against the cost of other preservation materials and resources. For example, the “best” materials are archival quality, but such materials, including Mylar polyester film, acid-free tissue paper, buffered corrugated board (often called blue board), Tyvek (nonwoven polyethylene fabric), and ethafoam (a closed-cell, stable foam) can be prohibitively expensive. More affordable options, such as plain cardboard boxes, newspaper, and plastic bins can result in damage over the long term. What solutions will give the best results within your budget? Also consider the labor costs of rehousing objects, purchasing equipment, etc. It may be worth considering premade archival-quality boxes available from museum suppliers online. For more information on long-term preservation and maintenance costs, see <a href="#">Chapter 4, “Budgeting for Your Inventory Practice,” on page 39</a>.</p>

# Risk Assessment

Risk is unavoidable, but manageable if you consider the potential variables that could damage an artwork or a collection of work.

## What puts your artwork at risk, and how can you manage each risk type?

 <b>Light Levels, Both Visible and Invisible</b>	<p>Light, particularly ultraviolet radiation (UV), induces chemical changes that trigger degradation of cellulose and can cause colors to fade. Light levels should be kept as low as possible for as long as possible and natural sunlight should be filtered as much as possible (or shades drawn). Sensitive materials should be kept covered to mitigate cumulative light damage. Whenever possible avoid direct or reflected sunlight and lamps that generate lots of heat.</p>
 <b>Dust and Pollutants</b>	<p>Dust is a mix of sloughed-off skin cells, hair, cloth fibers, bacteria, dust mites and their droppings, insect parts, soil, pollen, mold spores, microplastic particles, and other environmental detritus. This combination is abrasive to surfaces, and delightfully delicious to a whole host of insects. Dust accumulation can stain some organic materials and plays a part in acid migration, which can lighten or darken a surface. Poor air quality and limited circulation can accelerate degradation. Pollutants, both from the outside air and off-gassing materials in your collection, can corrode metal. Soot and dust, which are excellent at holding moisture, are also susceptible to mold growth.</p>
 <b>Fluctuating Temperature and Relative Humidity (RH)</b>	<p>Fluctuating heat and moisture can cause materials to expand and contract, accelerate chemical causes, encourage mold growth, and are vital to some insect activities. These fluctuations are particularly damaging to composite objects, those with more than one type of material, which may expand or contract at different rates. Consistency of the environment is important, since it helps to ensure chemical and dimensional stability of organic and inorganic objects.</p>
 <b>Accidents</b>	<p>Accidents can be caused by faulty shelving, overcrowding, mislabeling, inexperienced handling, or unsafe conditions. A bit of forethought can prevent most accidents and small steps can have huge impacts. Whenever possible, unplug inactive equipment, use "Art Below" signs (see <a href="#">"Tip: Make Art Below Signs" on page 113</a>), note the condition of storage equipment, and replace/repair as needed (potential use of grant funding).</p>





## Insects and Pests

High humidity, stagnant air, poor housekeeping, and the location of your storage areas can contribute to a pest problem. Moths, carpet beetles, dermestid beetles, silverfish, cockroaches, flies, termites, and firebrats are just some of the object-eating insects. Rodents, birds, and other animals can also damage collections through eating and nest building. Objects made of paper, plant fibers, wood, wool, egg tempura, leather, silk, textiles, or containing starch-based adhesives are particularly appetizing to pests. So make sure none of these materials are left exposed in your storage. No liquids, aerosols, or powders used for pest control should ever come in direct contact with artworks or the materials used in artworks. If this happens, document the type of insect repellent/killer that came in contact with the work so that future handlers can take the proper precautions.



## Emergencies

Is your area at risk for earthquakes? Flood? Forest fires? Do you have a fire-detection system? In a non-life-threatening emergency, do you have a system and an appointed person in charge of checking on your artwork in its various locations (home, studio, storage)?



## Tip: Make Art Below Signs

Protect artwork stored on a flat surface from accidental damage with a simple sign.

Photos by Noel Kassewitz



After gathering your materials, fold the sign along the dotted fold lines.

Be sure to complete your folds towards the blank side so that the printing faces out.



After completing your folds, tape the overlapping bottom pieces together with tape.

Avoid stapling which may create a hazard to handlers or art.



After taping, use your sign to indicate where covered art is on a surface.

Download an "Art Below" template at [joanmitchellfoundation.org/cdg2022](https://joanmitchellfoundation.org/cdg2022).

# Risk Management

Now that you are aware of some of the potential risks, how can you help prevent them? Do you have a plan for when they are unavoidable? Your planning should include surveying the environments where the work will be produced, displayed, and stored, whenever possible. You may need to enlist the help of a Facilities Staffer or Building Manager to complete the information and help with building maintenance.

## State how you are able to:



### Minimize Light

You can record and monitor light exposure with the use of a foot-candle/UV meter (available for purchase online). Recommendations for light levels or general background illumination are 5 fc (50 lux) for highly sensitive objects such as paper, watercolors, and textiles, and 15–20 fc (150–200 lux) for moderately sensitive objects like an oil painting. Plan to have returning paper loans “go to sleep”—be off the potential loan list for at least a year per three months of exhibition time. Windows should be given dark treatments or semitransparent shades, you can use a UV-filtering acrylic sheet (often sold as “museum glass”) over the windows if treating them or using shades is impractical. Use filters on lamps or purchase bulbs with low to no UV output. Cover exposed artwork with an appropriate material, such as glassine, muslin, blotter paper, or clean cotton sheets to limit exposure time, and leave an “Art Below” sign if it’s not readily clear that your work is under that cover (see “Tip: Make Art Below Signs” on page 113). When possible, keep works on paper in flat files or in closed boxes, and if framed, cover with a dark or opaque cloth. Turn off lights whenever possible.



### Minimize Air Pollution

Having an efficient HVAC system or air conditioner can reduce dust and gaseous pollutants. If your unit uses replaceable filters, best practice would be to change your filters every three months minimum. If the filters are not replaceable, clean them at least every three months. Ensure that air can circulate in your space to prevent mold and mildew growth. Whenever possible consider using materials that off-gas (adhesives, varnishes, resins, etc.) in a separate space from where you store your artwork. If that is not possible, use an additional air purifier or use fans to help ventilate the space as much as possible.

**Stabilize  
Temperature  
and Relative  
Humidity (RH)**

As much as is possible you'll want to maintain the condition to which the artworks are acclimated. A stable environment is similar to one humans find comfortable: 60–70 degrees Fahrenheit and 50–60 percent RH. This range may not be achievable in all climates across the year, but recent research suggests that gradual seasonal variations are far less damaging than sudden daily variations. When storing photographs or older film use a space that is the coolest and driest year round. Take care to avoid sources of heat or sparks near film to prevent combustion. Consider using a dehumidifier to reduce dampness; create microclimates around sensitive materials using silica gel to absorb moisture. If funds are limited priority should be given to maintaining seals and weather-stripping around doors and windows.

One cost-effective method to insulate against sudden temperature changes or humidity could be surrounding your most sensitive materials with books that are not rare. For books to act as a moisture buffer, they need to line the outer perimeter of the space with the sensitive materials in the center. A good example would be bookshelves on the walls and collection materials in the middle of the room.



**Minimize  
Pests**

Pests can wreak catastrophic damage on artwork by eating, nesting, and leaving their droppings on surfaces. Dust, dirt, food, and nesting spaces are attractive to them but good housekeeping practices can help deter them. Regularly clean your studio or storage spaces by removing trash, removing food waste daily, sweeping, vacuuming, dusting, using glue traps in strategic locations as part of implementing an Integrated Pest Management (IPM) approach. IPM is designed to reduce the risks of pest infestations without the use of harmful chemicals, pesticides, or fumigation, which can pose long-term health risks to yourself and others.



**Prepare for  
Emergencies**

Make sure fire-detection systems such as smoke detectors are working and replaced at the manufacturer's suggested intervals. Fire extinguishers should be placed in strategic, highly visible locations and serviced at regular intervals. Check that the building has a flood and fire emergency plan. Your artwork is important but human life is top priority, ensure that everyone knows the safety plan in the event of an emergency. To access more emergency preparedness tools for artists visit CERF+ The Artists Safety Net.



### **Prevent Accidents**

Make sure you are using appropriate materials for storage and handling, and that you use “Art Below” signs if it is not immediately clear that artwork is underneath a covering (see “[Tip: Make Art Below Signs](#)” on [page 113](#)). Before moving artwork check to ensure the path is clear of obstacles and that the final location for the work has been prepared. Follow your instincts as an artist and/or caretaker—you are the voice for the work and must exercise it to ensure the work’s and handler’s safety. Entrust the artwork to experienced providers and agents only. These include conservators, framers, shippers, and art handling companies. If you are working directly with an agent, and are uncomfortable with the way something is being handled, speak up. The Registrars’ offices, conservation labs, or curatorial offices at local museums can serve as a resource and can refer you to appropriate service providers.

## **Storage and Access**

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Once you have an organized system in place, you can create labels and a studio or storage map to aid in locating artworks, supplementary materials, and accompanying filing systems. Create your maps and labels as if you were guiding someone who has never been in your studio or storage space. Include all the locations in which your work is stored, such as your studio, storage areas, homes, galleries, or other off-site locations. The map should identify each area of storage containing artwork, archive materials, and other important information. Each flat file, drawer, cabinet or shelf should be named and labeled and the corresponding label should appear on the map.

You don’t have to write out a location fully but consistency is crucial to making the storage map useful and efficient. For example, someone should be able to find an artwork in your Art Storage Room 1, in Cabinet A, and on Shelf 3; or in the Studio, in Flat File G, and in Drawer 7. When you create the record for each artwork, its physical location will be documented. This documentation will create a clear connection between your physical inventory and your record-keeping system. For the physical storage of the artwork, the material, structure, size, and shape of your work will be major factors in determining the appropriate storage, display, and handling protocols.

## Here are some examples of how different items can be stored:



### Paintings

Approaches include vertically and horizontally stacked (similar size and no more than five deep, face-to-face and/or back-to-back), placed on block “feet” and leaned against a wall, wrapped in safe materials, or hung on a screen or wall. If unstretched, one method is to roll the canvas onto an archival cardboard tube/sealed non-archival tube with interleaving (face-out is often safest). Dry paint is often still pliable so it’s important not to crush impasto by rolling unstretched canvases too tightly or by stacking stretched canvases improperly.



### Works of Art on Paper and Books

Consider using archival boxes, acid-free interleaving, placing work in archival folders, or in flat files, if framed. Note on the outside of drawers or folders if the contained work was made with chalk pastels, charcoal, or any medium that is loosely bound to the sheet to avoid potential smear or surface disruptions. Works on paper with stable media, such as graphite, ink, and printed materials, can be stacked in flat files as long as they are below the level needed to pull the drawer out. Paper works with sensitive media, such as charcoal, pastels, or collages, should not be stacked any more than five works deep and need to be within folders to protect surfaces.



### Three-Dimensional Works

Use shelving, cabinets, bumpers/cradles for support, dust covers, secure with netting or straps, place on pallets, or break down into labeled composite pieces. Ensure at least six inches of space between the object and the floor, items sitting directly on the floor are often hard to move and can be damaged.



### Textiles and Fabrics

Use unbleached cotton muslin to cover/interleave works, roll onto appropriate-sized tubes, store the tubes on cradles, use archival tissue paper to stack items, and if folding is unavoidable, create pillows with folded archival tissue paper to support folded areas and make as few folds as possible. Ensure that any loose components, such as fringes, ribbons, and embellishments are secured prior to rolling, it may be necessary to wrap each component in tissue to prevent catching.



## Photographs and Film

Photographs and film can be printed from digital files or developed with chemical processes on plastic, glass, fabric, cellulose nitrate, or paper substrates. Particularly newer photographic processes can be incredibly light sensitive and care should be taken to reduce light exposure to the bare minimum. Older film can develop vinegar syndrome, which smells strongly of vinegar and is a clear sign of degradation. Film is extremely flammable, it may be necessary to have film migrated to newer film options or digital formats for preservation and safety. All photographic processes need to be protected from light. This protection could be in flat files, archival boxes, in archival film canisters, in folders, in cabinets, or if particularly sensitive, in cold storage. Organize materials like with like, and be sure that interleaving materials, like paper, cardstock, or tissue, are safe for long-term contact.



## Digital Assets

What digital materials do you have (podcasts, interviews, process videos, born-digital art, etc.)? How are writings, books, correspondence, ephemera, etc., archived? Do you have low- and/or high-resolution photographs of the artworks for documentation? How are they labeled and stored? Is there a backup or are the files recoverable? Are you using best practices in archival documentation and storage? To help answer these questions and develop a system for organizing and preserving your digital inventory, see [Chapter 7, “Managing Your Digital Image Assets,” on page 89](#). If you have the digital space, the TIFF (.tif) format for images and PDF (.pdf) for documents are more stable than the JPEG (.jpeg) image formats and the DOC (.doc) document format.



# Lending, Exhibitions, and Reprographic Services

What's your system for loaning works to galleries, on consignment, to museums? Do you have loan requirements? Are they clearly defined? Do you have upcoming exhibitions or pending deadlines? Indicate what that system is, where those files are kept, and include that information in your preservation plan and studio map.

## Artist Loan Requirement Checklist:

- ✓ **Artist's fee**
- ✓ **Appropriate shipping services**
- ✓ **Experienced art handler services**
- ✓ **Exhibition documentation**
- ✓ **Insurance coverage**

## Next Steps

Take realistic stock of your resources (people, space, time, and finances) and adjust the plan accordingly. When resources are limited it's preferable to make the best with what you have than to continuously postpone waiting for the "perfect" option. Maintain a wish list of necessary supplies for projects you don't have the resources to obtain or complete now. Some businesses (framers, fine art shippers) or other artists (check social media groups and listservs) may have excess stock, be downsizing or replacing items, or may be able to offer materials at a reduced rate or even as in-kind donations. Some museums have programs to donate crates, excess materials, and supplies to their local community, this varies by locale. Also consider activating your peer groups and professional networks to identify local reuse centers and other reusable suppliers.

For organizations and online resources that can support your effort, see ["Reference Materials,"](#) on [page 159](#).

# Draft Your Preservation Plan Outline

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The following Preservation Plan Worksheet contains some of the fundamental principles and current preservation practices used across our national museums, libraries, and archives. This plan has been adapted from the comprehensive preservation plan and policy publication *Preservation Management for Libraries, Archives, and Museums* by G.E. Gorman and Sydney J. Shep, and has been modified to fit the scope of this Career Documentation Guide.<sup>1</sup>

**Your preservation plan should be considered a living document to be used, checked, and revised whenever the need arises.**

- » You should adjust the plan as your needs evolve throughout the process.
- » The plan should be easy to access and easily understood by additional contributors.
- » You only need to complete sections that make sense for your studio practice and body of work.
- » Modify the plan as necessary and do your best to create smaller increments within your larger plan to keep it manageable.
- » Keep all your documentation organized by section in a binder with tabs for easy reference, and organized in a digital format (Google Drive, Dropbox, Apple iCloud, etc.) that is accessible off-site.
- » Document your progress with images capturing the storage spaces before and after to illustrate the impact of your work.

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<sup>1</sup> G.E. Gorman and Sydney J. Shep, eds., *Preservation Management for Libraries, Archives, and Museums* (Cambridge, UK: Facet, 2006).

# Worksheet: Preservation Plan

Use this activity sheet to help build your preservation plan outline.

**List your collection of artworks by series, medium, or other classification and where they are located.**

If the list is expansive, summarizing the number and types of artworks will be just as useful.

This image shows a single sheet of white paper with horizontal blue or green ruling lines, typical of notebook paper. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

**Outline how the artworks in the collection are utilized.**

Are the artworks loaned frequently? Used for teaching? Used for community cultural events?

This image shows a single sheet of white paper with horizontal green ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

**List the materials used to produce the artworks.**

Is the collection mostly oil-based prints, acrylic paintings, textiles, or black-and-white photographs? Mixed media or all of the above?

This image shows a single sheet of white paper with horizontal green ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

**Prioritize how and in what order the artwork and the materials need to be preserved.**

Determine which of the artworks are your top priority and make a ranked list. Priority can be based on number of artworks, sensitivity of artworks, importance, or what resources you have available. It's much easier for one person to sort photographs than move heavy artworks.

This image shows a single sheet of white paper with horizontal green ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## Risk Assessment

### Looking at your current space, what are the potential risks to your collection?

Consider the light levels, fluctuating temperature and relative humidity, dust, pest issues, potential for accidents, and what your emergency plan is.

<b>LIGHT LEVELS</b> <hr/> <hr/> <hr/>	<b>TEMPERATURE + HUMIDITY</b> <hr/> <hr/> <hr/>
<b>DUST</b> <hr/> <hr/> <hr/>	<b>PEST ISSUES</b> <hr/> <hr/> <hr/>
<b>ACCIDENT POTENTIAL</b> <hr/> <hr/> <hr/> <hr/>	<b>EMERGENCY PLAN</b> <hr/> <hr/> <hr/> <hr/>

### Plan how to minimize the risks you identified in the risk assessment.

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## Storage and Access

**Organize your storage space or plan an organization method.**

Create a map of your space as if a stranger needed directions. This will make record-keeping easier!



## Lending, Exhibitions, and Reprographic Services

**Do you lend artworks? Exhibit them? What are your loan requirements? In this section define your requirements for your artwork's safe display and transport.**

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## Supplementary Materials

Use this section to summarize your supplies, artmaking materials, notebooks, books, digital assets, other ephemera, and where they are located.

### List your available resources.

What materials do you have? How many people do you have helping? What amount of space do you have?

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### List your priorities with available resources.

Given the resources you have, what is accomplishable? What is the most important thing to take on with your resources? For example, if you have five assistants for a month, you may want to prioritize sorting and moving artworks, which might not be as easy to accomplish with fewer people.

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### Create a wish list of resources/projects.

What would you love to accomplish that you don't currently have the resources for? What are your resource needs? People power? Equipment? Space? Materials? This section will be particularly useful in preparing to ask granting organizations or supporters for the resources you need.

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# Worksheet: Condition Report

Use this worksheet to document the current condition of the artwork or collection item. This condition form may not cover all the potential issues with an artwork, but there is space to add further information in the future. If you encounter difficulty describing a condition issue in words, a photograph can be taken and marked to document the issue. This task is not meant to be difficult or to require an expert-level knowledge of materials; think of it as a reporting tool that helps you identify and document artworks that require intervention before exhibiting.

ARTIST STUDIO:

LOCATION:

COMPLETED BY:

CONDITION REPORT DATE:

/ /

ROLE: ☐ Artist ☐ Artist's assistant ☐ Collection manager ☐ Other:

TITLE:

YEAR:

BRIEF DESCRIPTION OF ARTWORK (e.g., painting from "Flight" series):

MEDIUM (BE AS SPECIFIC AS POSSIBLE):

## Handling considerations:

- ☐ Heavy ☐ Fragile ☐ Loose media  
☐ Hazardous materials ☐ Sacred materials ☐ Multiple components  
☐ Other, explain:

## Condition:

- ☐ Excellent ☐ Good ☐ Fair ☐ Poor, needs conservation/unstable

## Common Condition Issues

Below is a list of common condition issues that you may encounter in your work, depending on the medium. Composite objects (mixed media) may have condition issues in multiple columns. Refer to this table to complete your condition notes.

Paper / Books	Photos / Film	Paintings	Textiles	3D Objects	Digital / Time-based
Staining Tears Wrinkles/folds Fading Warping Structural/ binding issues Water damage Pest damage	Biological growth Staining Tears Wrinkles / folds Emulsion issues Fading Water damage Vinegar smell	Pest damage Tears Wrinkles Cracks Loose canvas Paint losses Fading Warped stretcher Pest damage	Tears Wrinkles/folds Holes Unstable stitches/ seams coming undone Fabric loss Fading Water damage Loose components Pest damage Staining	Missing components Cracks Breaks Losses Pest damage Water damage Biological growth	Playback issues Missing hardware Software issues Hardware issues No longer compatible with current technology

CONDITION NOTES:

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WHAT IS THE ARTISTIC INTENT? HOW MUCH CHANGE IS ACCEPTABLE?

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2. Studio visit to see old photos
3. Ted's assignment: search for old Photos
4. family photos of Seattle
5. family photos of Minidoka (National Historical Site)
6. photos with Ted in front of the Baptist in Florida
7. art photos
8. Ted, hats, and Joan
9. What is your full name. Is Ted a nickname, Japanese name?

5. What Ted wants to
1. mostly about his
  2. people who influence
    - a. parents and
    - b. Joan Vennum
    - c. Miss Laurie
    - d. Anders Torp
    - e. Robert Pard
    - f. Walter Rando

6. What Arlan wants to
1. Ted's artistic life
  2. To get Ted to talk about how he thinks the
  3. Ted and fellow artist Joan Vennum and
  4. extraordinary relationships as partners and in
  5. pivotal years

1925 - Birth

1942 - executive order 9066

1947 - Washington and Joan Vennum

1952 - marriage?

1960 - move to NYC - 78 Greene St?

2015 - CALL Joan Mitchell.

7. My idea for the interview is not linear. I would like to find pivot points and fill in years of your life that, ~~in total~~, influence you in total.

Over the last decade, Voices in Contemporary Art (VoCA) has partnered with institutions and artists across the globe to create educational programming and publish content that underscores the importance of the artist's intent in the stewardship of contemporary art. From 2015 to 2021, the Joan Mitchell Foundation partnered with VoCA to produce the CALL (Creating a Living Legacy)/VoCA Talks, a series of artist interviews which share and preserve the artist's voice as an essential facet of their legacy. In this chapter, VoCA Program Director Margaret Graham outlines their approach to career mapping as a means of understanding an artist's life, work, and career—and as a tool to help you plan your own artistic legacy.

Arlan Huang's notes for conversation planning with Ted Kurahara.  
Courtesy of Arlan Huang.



# Capturing Your Career Map and Timeline

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BY MARGARET GRAHAM FOR VOICES IN CONTEMPORARY ART (VOCA)

Imagine if you were to approach the career documentation process as if you'd been invited to give an in-depth interview chronicling your life, career, and artistic legacy. This is an opportunity to tell your story in your own words and to create, add to, or correct the historical record regarding your work. The task may seem daunting, but it can be done—and enjoyed—if you take the process one step at a time.

## **Our biggest piece of advice? Don't do it alone.**

Though there are many ways you could go about it, we have found that the most fruitful method of presenting and preserving an artist's story is by doing so in conversation. The magic of VoCA Talks comes from the element of collaboration, of pulling out details and teasing out ideas during an exchange with another person or party, especially one that unfolds over time. While self-reflection is a vital piece of the puzzle, **VoCA has learned that dialogue is an essential—if not *the* essential—foundational tool for successfully mapping one's artistic career.**

The method outlined here is drawn from the interview preparation process for a VoCA Talk, but this preparation has many other applications. Through mapping the narrative of your career and practice, you can begin to frame how you introduce your creative output to anyone supporting your studio work or your legacy planning. The mapping process can also inform how you approach and organize your artwork inventory, your personal papers, your bibliography, etc.

“Every artist wants to organize their artistic life but is afraid of the challenge. The task is so overwhelming...because your whole life gets archived, and you’re thinking it’s something you do at the end of your career. But archiving my artwork truly established a foundation for new work.

It forced me to reflect upon the work’s linkages over decades, and how they connected. I never really paused and took the time to closely examine the work in its entirety.”

—BLANE DE ST. CROIX



Blane De St. Croix, *Mountain Strip*, 2009. Wood, plywood, foam, plastic, paint, branches, dirt, and other natural materials, dimensions variable. Photo by Etienne Frossard.

## Preparation and Reflection

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Now that you have chosen to embark on this journey, the first place to look is in your own backyard, so to speak. Take the time to organize and inventory your studio, and go through as much of your artwork as you can to make sure it is accessible, properly documented, and protected for the future.

Once you’ve had the chance to review your work, consider its trajectory and how it has changed or evolved over time. What, if any, are the threads or themes that recur, or that tie your oeuvre together? By looking at your work in retrospect, and assessing it not just as separate parts but as a whole, you can identify linkages and connections you may not have noticed before. With this holistic view, you can then start to ask yourself what topics, concepts, or bodies of work are most important to you, and which ones you might want to include as part of your map or timeline.



“Everybody should have this opportunity to work with someone, because it’s really, really hard to do it alone because you get just consumed by the memories and the weight of the context of it all. But having a...person help you go through it was so wonderful.”

—CHRISTY RUPP



Jonathan Allen with Christy Rupp at 2018 CALL/VoCA Talk.  
Photo by Taylor Dafoe.

## Choose a Collaborator and Invite Them In

What makes a good collaborator? Who do you want to join you on this adventure? A family member or friend is a great option, though intergenerational friendships have often proven to be the most invigorating for our VoCA Talks with artists. Whether it is a person you know, or someone you just met, it is important to feel that they are someone you can trust and develop a rapport with; who is willing to do the research and is thus well-informed; who is an active listener; someone who is curious and porous to new information or perspectives; someone who is open, and willing to be mutually vulnerable.

Throughout the career-mapping process, your collaborator will act as a motivator and sounding board, assisting you with organizing your thoughts, sorting through memories, and asking creative—and sometimes difficult—questions. They will likely want to take notes and photos during your conversations, to serve as a chronicler of the process as well as its outcomes. As such, it can help to work with someone who is organized, flexible, and somewhat tech savvy.

“It’s not easy to let someone into your studio. It’s hard to let yourself into the studio, because there’s demons in every corner, and I don’t particularly want to reveal them.

So when Beth came, I was a bit protective. And it actually took a while. We had a couple of rough patches. But I think we’ve found a very nice way of working.”

—ARLAN HUANG



Arlan Huang with Beth Krebs at 2015 CALL/VoCA Talk.  
Photo by Taylor Dafoe.

## Build a Relationship by Looking and Talking Together

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Now that you’ve opened the door, the dialogue can begin in earnest. Look at and discuss your artwork with your collaborator, revisiting the ideas or bodies of work that are most important to you. If you can, invite them to your studio—a place that VoCA interviewer Jonathan Allen describes as “the psychic home of the artist, where their art, life, career coalesce”—and use the work at hand as a jumping-off point for an in-depth conversation about materials, motivations, and process. Look at how your studio is organized, what’s there, and what’s prioritized. Next, perhaps you can visit a museum or gallery together, and discuss other artists’ work, providing context and contrast to your own artistic practice and philosophy.

The more you talk—the more questions your collaborator asks and the more information you share—the more the map of your story will reveal itself. In addition to talking about your artwork, it can be helpful to consider how you define the terms “career” and “success.” Some define career as the exhibitions, awards, grants, opportunities, or financial support that artists can enjoy from their work, but a more elastic definition would include the communities, underground or idiosyncratic spaces, and expansive priorities that form an artist’s livelihood.

Sometimes, the conversation can get emotional, and that’s ok. There will be things you can’t remember, and that’s ok, too. Having someone else to lean on who provides a different viewpoint will help you to dig deeper or approach things in a way you may not have thought of or articulated before. Working with another person can also be a path to knowing yourself and to becoming aware of your own biases, blind spots, and sensitivities. This process is neither quick nor easy, and can take anywhere from a few months to many years, depending on how much time and energy you and your collaborator are willing and able to commit to it.

"I used to think, well, who's going to care about my work? Who cares about [any of] this? But now that I look back at what we did with Joan Mitchell [Foundation] and then this [VoCA Talk] presentation, I think that as an artist or creative person, you should give yourself a lot more credit, because now that I see this, I think, wow—it's a life lived. And you're really kind of recording your life. And that is very important."

—MARIO MARTINEZ



Mario Martinez with Steven O'Banion at 2017 CALL/VoCA Talk. Photo by Taylor Dafoe.

## Identify Your Goals, Shape Your Narrative

After laying the groundwork, now is the time to make a few decisions about your map and timeline. Use the following questions to help organize your thoughts and memories as they relate to the career documentation process:

**First, which artworks or bodies of work are most meaningful to you?** Your map will not be able to cover everything, so choosing specific works, or a specific angle, will help you to streamline the process and hone in on what matters most.

**Second, think about the structure of your narrative.** How is your story organized in your mind: chronologically, thematically, or in some other way?

**Third, how does your biography connect to your creative production?** How personal do you want to get, and how much are you comfortable sharing?

**Fourth, what (if any) scholarship speaks best to your working process?** Are there other works of art (not your own) or published texts that have been especially informative for you? Has anyone written about your work and articulated insights that you find poignant or resonant?

**Finally, where and how do you envision conversations with your collaborator(s) taking place?** Will it be private, perhaps in your home or studio, or in a context-enriching location? Consider spaces that you feel will help your collaborator understand the full scope of your work.



“Well, I think, for any artist, if you’re creating, you’re creating for people. But sometimes, the only people who see your work are your family, and maybe a few friends. [This] offers a chance to artists to get exposure for their work. Most of us who are artists, we understand it’s not about us; it’s about the message we feel is in our work. And we would like to get that message out to as many people as possible.”

—EMMETT WIGGLESWORTH



Emmett Wigglesworth at 2015 CALL/VoCA gathering.  
Photo by Taylor Dafoe.

## Tell Your Story, On the Record

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The penultimate step is to prepare accompanying documentation to your conversation. This could be a timeline, a written outline, or, in the case of most VoCA Talks, a slide presentation with images of key works of art. In the case of a slide presentation, we suggest no more than sixty images of your work (and other’s work, where necessary), that you can scroll through over the course of your conversation. If you can trim it down to thirty images, even better. The images will help to organize your story, guide your conversation, and trigger memories or concepts, as needed, both for yourself and whoever might be watching or listening down the line.

Then it’s time to tell your story via a formal conversation with your collaborator. This culminating interview can be a video or audio recording, and will serve to document your voice. If you can keep the interview between one and two and a half hours, that is ideal.

Remember, you are not starting from scratch, but probing and reflecting on something you have already built over the course of a lifetime. You are the author of your own legacy and the expert on your work, so give yourself the time and space you need to embrace and feel confident in that role.

"Whenever I connect with the people and events of VoCA, my own will to make new art is given energy. It's amazing how much my insight into the experience of my life's focus on art is expanded by hearing about the experiences of the other artists through their talks."

—GWEN FABRICANT



Gwen Fabricant with Jennifer Hickey at 2017 CALL/VoCA Talk.  
Photo by Taylor Dafoe.

## Spread the News

The final stage is to share your story, and the outcomes of your career-mapping experience, with the wider world. While what you've created throughout this process will no doubt be quite valuable to you, it can also be an incredibly fascinating and insightful resource for others such as students, curators, future researchers, and potential collectors as well.

There are lots of creative ways you can start using and sharing your narrative, including hosting a public event, such as a talk or exhibition, with an audience; a public or private screening of your recorded interview; a selection of images of your work or personal reflections shared on your website and social media accounts; an email blast or newsletter to friends and family; or any other community outreach you feel comfortable with. This communication does not have to happen only once, but can be serial; we encourage the artists we work with to share their narratives as widely and often as possible, and invite our colleagues and affiliated program partners to do the same. The narrative itself also does not have to be fixed, but can be viewed as a living document that is revised and updated over time.

VoCA's ongoing collaborations with artists have shown us that career mapping through conversation can also have many benefits beyond the final product, whatever shape it may take. The process of creating a map has increased artists' self-confidence, reminding them of their achievements and reaffirming their purpose; it has also helped them create a deep and lasting relationship with at least one trusted colleague; provided them with broader visibility and recognition from expanded audiences; and intensified their motivation to continue making work and pursuing new ideas. With these tools, we've observed artists achieve a level of clarity about their past production, grounding their story in the present moment, and looking forward to exciting, unknown creative futures with hope, pride, and a solid foundation to support them.

# Worksheet: Career Mapping

Use this worksheet to begin brainstorming the content and format of your career map, and determine who would be the ideal partner to join you on this journey.

**Who is your potential collaborator? List one to two people.**

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**What is your relationship to your collaborator/s?**

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**Briefly outline what you want them to know most about your goals—and what you are hoping to receive from them—throughout this process.**

You can reference “[Worksheet: Long-Term Goal Setting](#),” on page 21, to help you complete this section.

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Think about which of your artworks or bodies of work are most meaningful to you. Your map will not be able to cover everything, so choosing specific works, or knowing the specific story you want to tell, will help you to hone in on what matters most.

**To get started, list ten works, series, or bodies of work that are most representative of your overall practice or most crucial to your story.**

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9. 

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10. 

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**Think about the structure of your narrative. How is your story organized in your mind?**

1. ☐ Chronologically
2. ☐ Thematically
3. ☐ Some other way (describe below)

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**How does your biography connect to your creative production? How personal do you want to get, and how much are you comfortable sharing?**

Your responses to these questions will help you and your collaborator establish guidelines for crafting your career map and narrative.

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**What (if any) scholarship speaks best to your working process?**

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**Are there other works of art (not your own) or published texts that have been especially informative for you?**

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**Has anyone written about your work, and articulated insights that you find poignant or resonant?**

You can revisit [Chapter 8, “How to Create Your Bibliography,”](#) on page 101, and [“Worksheet: Bibliography”](#) on page 104, to help you complete this section. List selected bibliography.

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**Where and how do you envision these conversations taking place? Will it be private, perhaps in your home or studio, or in a context-enriching location?**

Consider spaces that you feel will help your collaborator understand the full scope of your work, and jot down your ideas.

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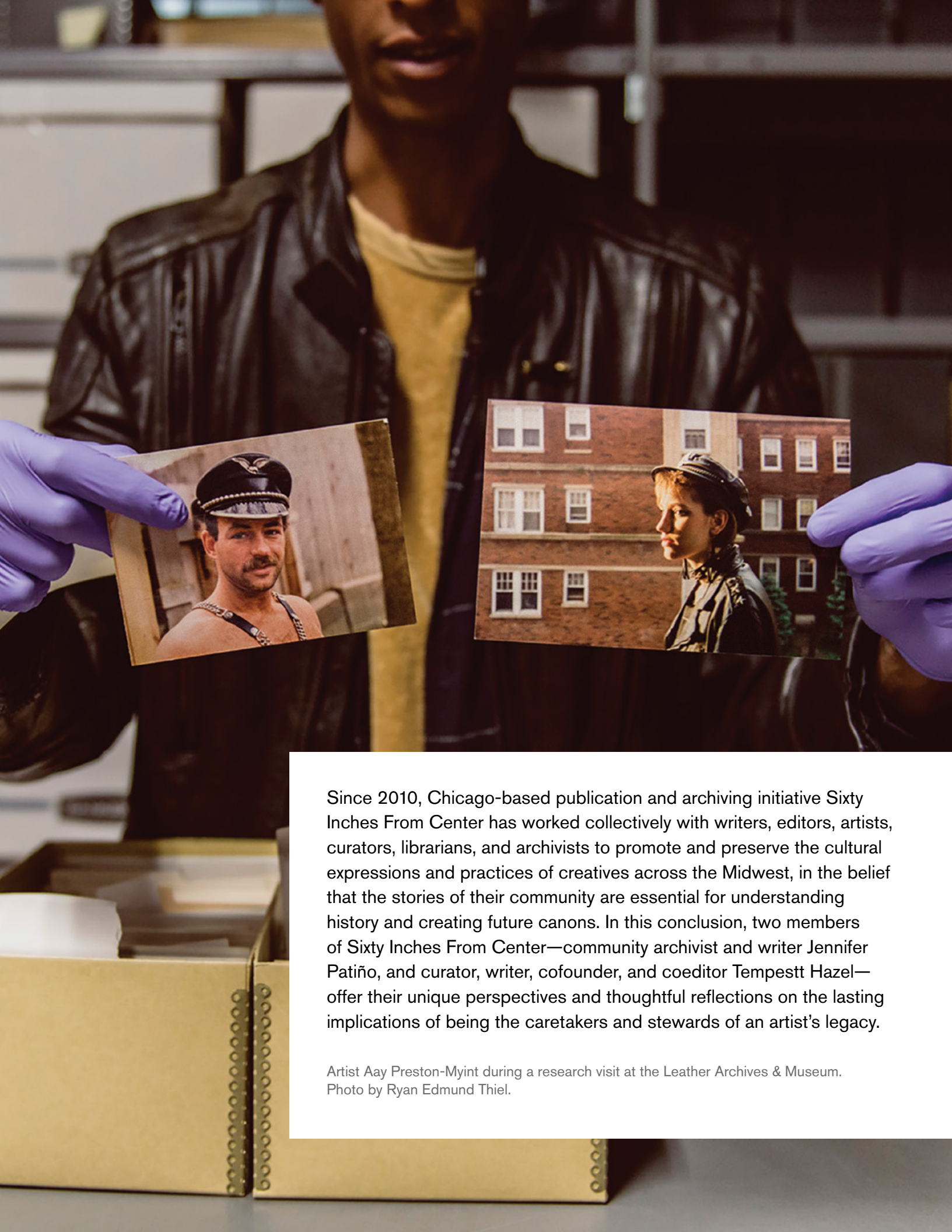
**How do you envision sharing your story? Select all that apply.**

1. ☐ Talk or exhibition, with an audience
2. ☐ Public or private screening of your recorded interview
3. ☐ Selection of images of your work or personal reflections shared on your website and social media accounts
4. ☐ Email blast or newsletter to friends and family
5. ☐ Other community outreach (describe below)

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Since 2010, Chicago-based publication and archiving initiative Sixty Inches From Center has worked collectively with writers, editors, artists, curators, librarians, and archivists to promote and preserve the cultural expressions and practices of creatives across the Midwest, in the belief that the stories of their community are essential for understanding history and creating future canons. In this conclusion, two members of Sixty Inches From Center—community archivist and writer Jennifer Patiño, and curator, writer, cofounder, and coeditor Tempestt Hazel—offer their unique perspectives and thoughtful reflections on the lasting implications of being the caretakers and stewards of an artist's legacy.

Artist Aay Preston-Myint during a research visit at the Leather Archives & Museum.  
Photo by Ryan Edmund Thiel.

# Conclusion

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BY JENNIFER PATIÑO AND TEMPESTT HAZEL FOR SIXTY INCHES FROM CENTER

## Making Connections

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BY JENNIFER PATIÑO

Prior to the pandemic, Sixty Inches From Center would regularly host Get Archived! events at various arts and culture hubs throughout Chicago. This event would assist local artists in documenting their artwork images, personal papers, and ephemera. Along with receiving these documentation services at the event, participating artists could also opt to donate their materials to the Harold Washington Library Chicago Artist Files collection. My participation in these events has made me aware of the monumental-size gaps in our archival historical record and showed me the need for conscious remediation. There's a tension I often experience when engaging archival institutions and museums in the documentation of our local history. I feel heavy about what is absent in the archive while I take comfort in what is there and in those working to make the archives better reflect community history. Through Sixty Inches From Center's archival programming, digital platform, and publication, the community is working collectively to capture and preserve the city's full, rich stories and contributions; this is community love in practice. By connecting the past and present to future generations, we not only mend the gaps in the archive, we also transform the archive into an active space of possibilities.

Driven by our organization's mission to connect artists, community, institutions, and archives, I feel well positioned to conclude this Guide by offering some insight into institutional archives. Although we appreciate that archives exist and preserve our historical items, oftentimes that appreciation does not translate to the material resources these institutions need to operate at their fullest potential. Many archives are understaffed, underfunded, and struggling with massive backlogs that render the items they care for functionally inaccessible. When preparing to donate the documented materials from the Get Archived! events, I began creating basic inventory logs to assist the archivist who would process our items and to provide them with the information they would need. Most archives

tend to keep the materials they collect in their original state, so the time you're taking now to document, organize, and inventory your work will inform how it will be processed, cared for, and made accessible in the long term.

As you are working to document your legacy, archives are dealing with their own legacies as well—and some are doing it better and more transparently than others. An archivist has the power to decide what to include or exclude in their collections, and historically, for many archives, that has meant the purposeful exclusion of marginalized voices. Archival silences, those absences and erasures, whether by design, neglect, or simply by the effects of time, all have their own impact, rippling out to all areas of our history, our institutions, and even our imaginations. Which is to say, that what is missing, what is in the negative, can impact our sense of our past, our present, and our future as much as what is there. Steven G. Fullwood ends “[Taking Stock and Mapping Your Archival Legacy](#),” on page 57, by telling you to “Be your own archivist”—it’s a powerful directive. You have the power to decide that your work is worth preserving and take the steps towards that yourself. You can and should work now to preserve what matters most to you. Your legacy is yours to claim.

The knowledgeable and compassionate writers of this Guide understand what it’s like to do this work, all the challenges and frustrations as well as the joys and successes, making it the perfect lantern to light your way. Even if there are times when the path can feel lonely, I’ve seen the impact that documenting work can have on an artist and their surrounding communities. I’ve seen it lead to more opportunities for individual artists and watched them turn around and support other artists. I’ve come across community archives that started out as efforts to preserve a family member or a loved one’s artwork and blossomed into spaces that embrace and are embraced by the larger community. The work of building an archive reminds us of our interconnectedness. It begins with reconnecting to yourself, your loved ones, your community, to society, and to the future.

## A Love Note from the Other Side

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BY TEMPESTT HAZEL

First, allow me to introduce myself. I am one of the people waiting lovingly on the other side of this process of organizing your life’s work and creating your archive. I am someone who might be digging through your files and folders years from now in order to write essays, curate shows, and draw links between your work, your words, and those of other artists or related periods in history. I’ll be the person falling in love with your letters, sketchbooks, and the illegible notes written in the margins of your papers. I am the person who is going to want to do right by you and your work while quoting your words in the most authentic and aligned context. I will bring up your name in studio visits and during panel discussions while pulling up installation views of past exhibitions for interested audiences. I will seek out the parts of your story and your work that have yet to make it into books, shows, and essays. I am one of the potential future explorers of the material portrait you will create for yourself.



Maybe you're like me in that when you read this Guide you feel a slight weight lift from your shoulders, removed simply by knowing that you have been handed a blueprint from which to build and that you are not alone in this process. But while one weight is lifted, others may still linger because archiving isn't solely the process of organizing. As several of the contributors to this Guide have stated, it is also a highly personal and intimate practice of reflection. It is an act of love and an expression of self-worth, and often articulates community love and value. Therefore, it is also a space of vulnerability.

It must be acknowledged that public and private acts of care and declarations of worth don't come naturally to all of us—myself included. That might be especially true for those who have spent the better part of their lives not seeing themselves expansively and accurately reflected in the creation, circulation, and preservation of knowledge, history, and culture. Perhaps, as a result of this lack, some artists may hold a skewed understanding of their contributions to this (art) world, which has left them unable to know with certainty why their self-preservation is essential. This Guide is undoubtedly for every artist, but in case it wasn't clear in the pages preceding this one, and in case you need to hear it explicitly, this Guide is for you. Our world's story is incomplete without your chapter. And while we can never fully control how a legacy lives on generations into the future, it is almost certain that your story will be much more distorted without your hand in shaping it.

I read this Guide through the lens of my experience as a cofounder of Sixty Inches From Center, an organization that was established in 2010 to address art historical absences in archives and arts writing, to advocate for artist legacy building, and to model non-extractive coauthorship approaches to cultural preservation. We are dedicated to the building of more inclusive future canons that are defined by and with artists, especially those most neglected, tokenized, and undervalued in historical records and media.

But I also read this Guide as a researcher, writer, and curator whose practice has been largely defined by fragmented, absent, or misplaced stories, and the legacies I've longed for and searched for. I am someone whose early experiences with art history left me with an unsatisfied desire for the voices of artists and more historic and material evidence of the communities I belong to. Sixty Inches From Center was created, in part, because the cofounders and I shared and wanted to confront this dissatisfaction.

I could spend lifetimes discussing the cause and rippling effects of these absences, but for the sake of this love note I will focus on examples that illustrate the importance of every artist dedicating time to their self-preservation voyage. I want to offer you two case studies, using artist archiving projects and explorations I am currently in the thick of.

As I write this, I am on the southern coast of Maine, sitting in the unbelievably beautiful home of painter and printmaker Beverly Hallam and art collector Mary-Leigh Call Smart, a home that they began building in 1971 and dreamed of converting into an artist colony (now known as Surf Point Foundation) upon their passing. The story of Hallam and Call Smart's lives includes over five decades of making, exhibiting, teaching, supporting, and living in art—all of which can be seen and felt in every room of this house. There is work by Hallam and countless other artists on the walls and in storage rooms. Much of their library is intact, displayed on sprawling bookshelves across multiple floors. Overlooking Hallam's former studio is a lofted area and room dedicated solely to her archives, the archives of Mary-Leigh, and the papers of the Surf Point Foundation. Thanks to Yael Reinhartz, the foundation's executive director, I've spent hours going through their unprocessed collections—boxes and shelves of VHS tapes, audio reels, Ektachrome slides, artist lectures, letters, travel

journals, and photo albums. Most of it is thoughtfully marked with Hallam's handwritten descriptions and dates.

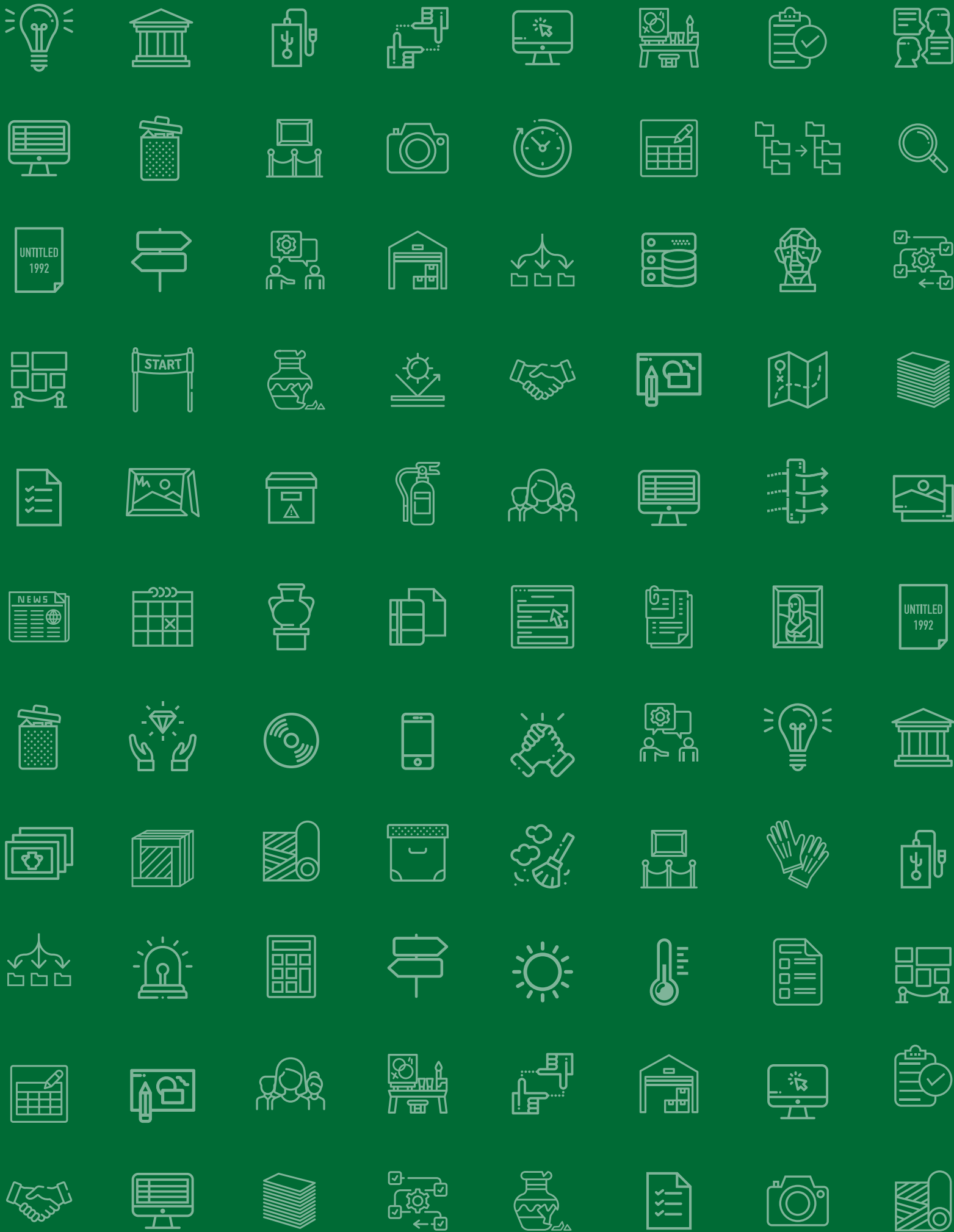
I was surprised to learn that these objects—thousands in number—were just a portion of their archive. This was the part that wasn't acquired by the Fogler Library at the University of Maine in 1978 or the Archives of American Art in 1992, 1996, and 2014. As of today, there have been exhibitions, books, and even a film chronicling Hallam's life's work. Even so, within these archives that stretch over multiple sites, there are many more stories to be told, whether publicly or privately; the materials are patiently waiting for the storytellers to tell them.

Simultaneously, I'm five months into a dreamy oral history and archiving project with sociologist, educator, and cultural caretaker Dr. Carol "Damali" Adams, a collaboration that originally began from archive research I was doing in 2017. Dr. Adams is one of the founding members of The Catalyst, a Chicago-born collective of Black artists, educators, sociologists, psychologists, cultural workers, and organizers who were a stealth force within a number of political, social and institutional liberation movements of the 1960s and 1970s. Although quite a few of the more than sixty members that The Catalyst has had over the decades are highly recognizable names locally and nationally, too many of them have precarious material legacies and lack in-depth first-person documentation that's accessible. As we attempt to do that work now, we are battling everything from archival materials being discarded or misplaced by surviving family members to the realities of time. Most living members are older. Several are battling health challenges, and quite a few have passed away since the archiving process was initiated. For some, when they are laid to rest they are taking their stories and ability to locate and identify important materials with them. For those who hadn't had the time, opportunity, provocation, or resources to organize their archives, those materials are often left with loved ones who don't know where to begin. As we work to build upon and assemble these legacies, I can't help but imagine what this project would be if life and circumstance allowed each of these artists and activists to have a vast material portrait like Beverly Hallam's to pull from for the future books, films, and exhibitions that we envision for The Catalyst's story. Or to anchor and inspire family members, artists, activists, curators, scholars, and anyone else chasing their curiosities.

During the oral history interviews I've gathered so far, many of The Catalyst members expressed their surprise that anyone was interested in gathering this history and sharing their stories. I was surprised that they were surprised.

Another note on love. Life and literature have taught me that the most epic of love stories are complex. Long before I could clearly identify love as something that I had or was experiencing, I had hints of what I could expect: a recipe of joy, pleasure, pain, confusion, clarity, and unpredictability.

This is exactly how I would describe what it's like to work with archives and collections. Archiving as a practice is an ongoing love story. My heart has broken, mended, and grown many times in this work. My heart swells so much more knowing that you made it here. Keep going—for yourself but also for those out there who will one day fall in love with your remnants.



## Advanced Tools

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Now that you've embarked on this journey through the career documentation process, it is important to keep in mind that the studio organization, record-keeping, and inventory management of your artwork and digital assets is just one aspect of the broader estate and legacy planning process for visual artists. We offer the following information and resources to support your continued legacy planning work and efforts.

## EXPERT OPINION

BY JIM GRACE AND LUKE BLACKADAR

OF ARTS & BUSINESS COUNCIL OF GREATER BOSTON

# The Significance of a Contract or an Agreement

Throughout your art practice, in addition to your dealings with clients, agents, and fellow artists, you will no doubt engage a number of professionals who will provide services to *you* (accountants, vendors, suppliers, contractors, etc.). And as with any business transaction, it is in *everyone's* best interest to document these relationships. You will typically do so by a contract or agreement.

Contracts go by many names and appear in many forms. However, the ultimate purpose of a contract is to document a relationship. (And not just a business relationship—a contract can set the expectations for personal and familial relationships as well.) The contract that will best suit your needs is one that

- » accomplishes your business **goals** and the **goals of the specific engagement**;
- » reflects your **relationship** with the other party; and
- » states deal terms in **understandable, unambiguous** language.

In this note, experienced attorneys and leading educators on estate and legacy planning for artists Jim Grace and Luke Blackadar will address some common legal issues that arise when entering into various types of contracts.

## Get It in Writing!

In most jurisdictions, unwritten oral or implied contracts can be enforceable, but it is always best to get any agreements *in writing*. There are a few reasons why a written contract is preferable:

- » it creates **accountability**—the parties have legally enforceable rights and duties;
- » referring to a neutral document the parties created when they had a collaborative mindset can **ease tension** when emotions flare; and
- » it's easier to **enforce** a written contract—a factfinder (either a judge or a jury) can rely on the document rather than the parties' individual and conflicting memories or opinions.

Any professional you engage *should* be amenable to executing a written agreement. And depending on the type of service provider, you may likely review *their* agreement rather than create your own.

# Important Deal Terms

It may seem obvious, but it is important to pin down the key deal terms. While the “important” terms will inevitably vary from contract to contract, there are at least three items that are universally critical:

## Goods or Services Provided: “What Am I Giving, Getting, or Doing?”

This is usually the heart of the transaction. What is the work that is being performed or the goods that are being delivered? In contracts for the provision of services, this might be referred to as the “Scope of Work,” and for the purchase of goods, simply a description of the goods. For example, a Scope of Work might include the following language:

### SCOPE OF WORK

1. Consultant shall design a digital inventory system to include the entirety of Client’s body of artwork as of the date of execution of this Agreement.
2. No later than 12 months after the date of the execution of this Agreement, Consultant shall (a) deliver to Client the Deliverables (as that word is defined in this Agreement), and (b) furnish Client with the necessary access credentials for the Deliverables, if applicable.

Both the Scope of Work or description of goods may appear either within the body of the contract or as an exhibit attached at the end (though make sure to identify any attachments in the body of the agreement). In addition to precisely identifying what the goods or services are, it is also generally a good idea to describe how and when the goods or services will be delivered.

## Contract Fee: “How Much Am I Paying?”

What compensation is being exchanged for the delivery of the goods or services? Clearly identify the dollar amounts and, similarly with how you describe the Scope of Work, include **how** and **when** payment will occur. (A common strategy is to tie payments to delivery milestones.) If you plan to rely on a calculation to determine what the payment amount will be, make sure the calculation **consistently works**.

## Ownership of Deliverables: “What Is Mine?”

Many transactions result in the delivery of goods, such as raw materials or works of art, or the creation of work product, such as a database or archival system. Identifying exactly what you own can easily become a sticking point, and getting it right really depends on the work being done. One important factor is whether the Deliverables embody any intellectual property (“IP”), such as copyrights, patents, or trademarks.

Personal property rights (ownership of a tangible object) are **separate** from IP rights, and both rights typically do not move together at once. Traditionally, the creator of an IP asset retains ownership of the IP, even if ownership of the physical object that embodies the IP changes hands.

For example, suppose you hire a photographer to shoot photos of a series of your drawings, and they give you both physical and digital copies of the photos. You have a personal property right



in the physical photos, meaning you can dispose of them however you wish. Similarly, with the digital copies, you can keep them or delete them. However, for *both* versions, you may not *copy* the photographs without the photographer's permission.

The best practice here is to be explicit about exactly what rights are granted with respect to any Deliverables, especially for any Deliverables containing IP:

## RIGHTS IN THE DELIVERABLES

Upon the execution of this Agreement, Consultant grants Client a worldwide, non-exclusive, royalty-free license to use, reproduce, and display the Deliverables for both personal and commercial purposes.

## Employee vs. Independent Contractor

Don't overlook this issue! It's essential to be clear on the nature of the transactional relationship, and it's easy to make incorrect assumptions. Whether the person you hire is an employee or an independent contractor has significant consequences on worker rights, tax liabilities, and even intellectual property ownership. It is in the best interest of *both parties* to any service agreement that they mutually understand exactly where they stand. Fortunately, a contract can easily clarify the issue.

Both employees and contractors perform work on behalf of another party—either an employer or a client—but there are key distinctions. While employment laws vary from state to state, generally,

- » an **employee** works for an employer who *controls the manner in which the work is performed*, including the schedule, place of work, and resources used.
- » an **independent contractor** usually sets their own schedule, determines their own pricing, supplies the tools necessary to complete the work, and is *free from control* over how they perform the work.

There are advantages and disadvantages in either relationship. For example, while employers have tighter control over their employees' work, they also have to strictly comply with wage, hour, and worker's compensation laws, among others. We recommend checking your own state's independent contractor laws or consulting with an employment attorney.

In either case, make sure you confirm whether your worker is an employee or independent contract in writing!

## Managing Risks

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Being a working visual artist can be complicated. If you expect to have team members (assistants, consultants, photographers, etc.) onsite, then be prepared to include contract language that spells out who is responsible for keeping them and their property safe, and how you will handle personal injury or property damage.

## Indemnification

Your contracts may include an “indemnification” clause. Put simply, an indemnification clause requires one party (an “indemnitor”) to cover the costs incurred by another party (the “indemnitee”) for injuries sustained by a third party. For example, a commercial studio tenant (indemnitor) indemnifies their landlord (indemnitee) against a personal injury claim brought by the tenant’s visitor (third-party) who slipped on a wet floor.

## Waivers, Releases, and Covenants Not to Sue

Your contracts may also include a “waiver” against any claims, a “release” from liability, or a “covenant not to sue.” While these words are often seen together, they have separate (though similar) purposes:

- » In a **waiver of a claim**, the waiving party *gives up* the right to file a lawsuit for certain injuries.
- » In a **release from liability**, the releasing party *relieves* another party from a duty to pay for the costs resulting from certain injuries.
- » A **covenant not to sue** is a *duty* for the covenanting party not to file a lawsuit for certain injuries. A covenant not to sue is stronger than a waiver, because filing a lawsuit would violate the covenant and therefore breach the contract.

## Assumption of Risk

Even though you have made a good faith effort to keep your space safe for visitors, you might want your visitor to acknowledge up front that they understand that visiting your studio can present certain risks. An assumption of risk clause does just that, and is usually paired with a waiver, release, covenant not to sue, or a combination of them:

### ASSUMPTION OF RISK

Client represents that it has, to the best of its ability, made a good faith reasonable effort to keep the Art Studio free and clear from any known hazards. Consultant acknowledges that visiting a visual artist’s studio can present certain risks, and Consultant agrees to waive any claims against Client and release Client from any liabilities arising from personal injury or property damage resulting from Consultant’s visit to the Art Studio.

Bear in mind that each of these clauses has its own unique advantages and disadvantages, and so they are complementary risk-management strategies meant to work together.

## A Note on Sources

Be careful relying on templates and samples found online. Every relationship is different, every contract is different, and each state has its own contract laws. Never rely on a sample agreement you found online without first tailoring it to your specific needs.

# Worksheet: Estate Planning Questions for the Artist

This questionnaire, which was originally developed for the *Estate Planning Workbook for Visual Artists* is included here to encourage you to consider your legacy in a larger context and to prepare you for conversations with an estate planning attorney. For more information, see the *Estate Planning Workbook for Visual Artists*, available at [joanmitchellfoundation.org/professional-development](https://joanmitchellfoundation.org/professional-development).

## I. Legacy

**How do you want to be remembered?**

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**How do you want your work to be remembered?**

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**Do you want your work to be protected? How?**

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**How do you want your work to be presented, collected, or sold?**

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**What do you think your impact has been, however you define it? What would you like it to be?**

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**Do you want or intend for your work to generate income for others?**

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**Do you want to support any particular group, location, or charity?**

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**Who could be a steward for your legacy?**

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## II. Inventory/Valuation of Your Artwork

**Do you have a current written inventory of all the artwork you have created?**

☐ Yes ☐ No

**Does it include all the components recommended by the CALL program?**

☐ Yes ☐ No

**Did someone assist you in its creation and/or do you need further assistance?**

☐ Yes ☐ No ☐ Need further assistance

**Do you have a current written inventory of all the artwork you have sold, gifted, or bartered?**

☐ Yes ☐ No

**Do you have a current written inventory of all original works in your collection made by other artists?**

☐ Yes ☐ No

**Do you have computer backups and/or hard copies of digital works?**

☐ Yes ☐ No

**Will your digital work, websites, cloud storage, or other online activity be accessible?**

☐ Yes ☐ No

### III. Significant Business Relationships

#### Are you represented by an agent or manager?

☐ Yes ☐ No

If yes, who? What is your agreement with this individual?

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Have you defined this relationship  
in a written contract?

☐ Yes ☐ No

Do you have a copy of  
this contract?

☐ Yes ☐ No

#### Do you currently have a relationship with a gallery/dealer/publisher/record company/record publisher/film company/film producer, etc. who shows/distributes/produces/publishes or sells your work?

☐ Yes ☐ No

If yes, what work have you licensed/consigned/assigned/sold, and to whom and under what conditions? Do you have those agreements in writing?

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#### Do you keep a list of the artworks that are on loan or on consignment?

☐ Yes ☐ No

If yes, could an executor easily locate it?

☐ Yes ☐ No

Current location:

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**Are there other gallery/dealer/publisher/record company/record publisher/film company/film producers who have shown/distributed/produced/published or sold your work in the past?**

☐ Yes ☐ No

If yes, to whom and what work? What has subsequently happened to that work?

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**Have you ever had any of your work appraised by a professional?**

☐ Yes ☐ No

By whom? Do you still have copies of any such appraisals?

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**Has any of your work ever been sold at auction?**

☐ Yes ☐ No

What auction house and who purchased the work?

Was it a charitable auction?

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☐ Yes ☐ No

**Do you have in your possession contracts such as location releases, image releases, synchronization licenses, image licenses, collaboration agreements, gallery consignment contracts, etc? For which project(s) and with whom?**

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## IV. Storage & Maintenance

**Do you currently have a dedicated studio space?**

☐ Yes ☐ No

Address: \_\_\_\_\_

**Own or rent? What is the lease term?**

☐ Own ☐ Rent

Terms: \_\_\_\_\_

**Do you currently have dedicated storage space?**

☐ Yes ☐ No

Address: \_\_\_\_\_

**Own or rent? What is the lease term?**

☐ Own ☐ Rent

Terms: \_\_\_\_\_

**Have you made arrangements for the maintenance and storage of your work pending its distribution?**

☐ Yes ☐ No

**Does your artwork require unusual storage, preservation, maintenance, or care?**

☐ Yes ☐ No

**Have you made any arrangements to insure your work?**

☐ Yes ☐ No

Insurer: \_\_\_\_\_

**Have you made arrangements for the maintenance, storage, and distribution of your art-making equipment and supplies?**

☐ Yes ☐ No

**Have you estimated the total cost of your planned disposition of your art, equipment, and supplies after your death (storage, distribution, conservation)?**

☐ Yes ☐ No

**Do you currently have insurance on:**

☐ Your Studio ☐ Your Artwork

☐ Other/Home/Etc

At what values? \_\_\_\_\_

**Do you have an insurance policy or other specially designated funds to pay for any such artwork-related estate administration costs?**

☐ Yes ☐ No

Insurer: \_\_\_\_\_

## V. Preservation Plan

**Do you have a preservation plan that describes the unique care and maintenance needs for your artwork, books, digital assets, and ephemera?**

☐ Yes ☐ No

**Have you clearly identified what artwork/s need to be preserved?**

☐ Yes ☐ No

**Have you identified a plan for handling site-specific works/happenings/installations/performances?**

☐ Yes ☐ No

**Do you want the site-specific works/happenings, installations, and/or performances to be restaged or reproduced? If so, have you included the specific instructions and/or sketches on how to recreate the work in your inventory?**

☐ Yes ☐ No

**Have you indicated which works are irreplaceable and are not to be conserved or displayed if an exact replica cannot be located?**

☐ Yes ☐ No

**How do you intend to conserve your timed-based media works?**

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## VI. Gifts & Bequests

**Do you wish to make specific bequests of your artwork to certain individuals in your will?**

☐ Yes ☐ No

If yes, to whom?

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**If you are not leaving your artwork to family and/or friends, have you considered other means of ultimately distributing your artwork after your death, such as through a charitable organization?**

☐ Yes ☐ No

If yes, which charitable organizations?

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Have you notified and received approval from the donee organization regarding your planned bequest(s)?

☐ Yes ☐ No

## VII. Trusts & Foundations

**Have you considered a trust to manage your collection?**

☐ Yes ☐ No

**Do you have a relationship with an institution, nonprofit, school, program, or other entity that could be a partner in your legacy?**

☐ Yes ☐ No

If yes, with whom?

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## VIII. Copyright Issues

**Have you ever licensed, assigned, or given away a copyright?**

☐ Yes ☐ No

If so, to whom and under what circumstances?  
Is it in writing?

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**Have you ever registered a copyright?**

☐ Yes ☐ No

Do you have a current listing of the copyrights that you have registered?

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**Have you ever donated an artwork but not the copyright along with it?**

☐ Yes ☐ No

**Do you control the copyrights of any works produced by others?**

☐ Yes ☐ No

**Did you create any projects or works with a collaborator?**

☐ Yes ☐ No

If yes, do you have an agreement governing the collaboration?

☐ Yes ☐ No

**Could your executor find records of the copyrights you own (in works created by you or by others)?**

☐ Yes ☐ No

Current location:

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**Do you want to give more than one person the copyright interest in individual works?**

☐ Yes ☐ No

Grant copyright to:

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**Is there anyone in your immediate family (spouse, children, grandchildren) that you would *not* want to be able to control your copyrights?**

☐ Yes ☐ No

Decline copyright to:

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**Have you addressed how unfinished works are to be treated?**

☐ Yes ☐ No

**Can a third party finish your work?**

☐ Yes ☐ No

If so, whom may do so and under what circumstances? Is it in writing?

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**Do you have specific instructions or restrictions on how your works may be used or licensed?** e.g., cannot be sold, commissioned books in the same series, music performed at certain venues, etc.

☐ Yes ☐ No

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# Reference Materials

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## Organizations and Online Resources

### **American Institute for Conservation** [culturalheritage.org](http://culturalheritage.org)

The American Institute for Conservation is the largest membership association for conservators, conservation scientists, and other allied professionals. Members are based throughout the United States of America as well as internationally. The website offers a “Find an Expert” tool, which can help you locate conservation professionals in your area, and resources on materials, emergency preparedness, and collections care. Information on regional conservation organizations can be found at: [https://www.conservation-wiki.com/wiki/Regional\\_Groups](https://www.conservation-wiki.com/wiki/Regional_Groups).

### **American Library Association** [ala.org](http://ala.org)

The American Library is the oldest and largest library association in the world with a focus on the development and promotion of library and information services in the profession of librarianship in order to enhance learning and ensure access to information for all. The website includes a “Tools, Publications & Resources” section that provides guidelines, standards, and additional information about libraries and archives.

### **Association for Preservation Technology International** [apti.org](http://apti.org)

The Association for Preservation Technology International is a multidisciplinary membership organization dedicated to promoting the best technology for protecting historic structures and their settings. Their international membership includes architects, engineers, conservators, consultants, contractors, craftspeople, curators, developers, historians, technicians, and educators. Their mission is the advancement of appropriate technologies to care for, protect, and promote the longevity of the built environment and cultivate the community of caretakers in the international community.

### **Conservation Center for Art & Historic Artifacts (CCAHA)** [ccaaha.org](http://ccaaha.org)

Conservation Center for Art & Historic Artifacts (CCAHA) has grown to be one of the largest nonprofit conservation centers in the country. Its wide array of services, sophisticated treatment facilities, innovative approaches, and highly trained and experienced staff have earned it a prominent and respected place in the conservation field. CCAHA's mission is to provide expertise and leadership in the preservation of the world's cultural heritage. They specialize in the treatment of works of art and artifacts on paper, such as drawings, prints, maps, posters, historic wallpaper, photographs, rare books, scrapbooks, and manuscripts, as well as related materials such as parchment and papyrus. CCAHA also offers digital imaging services, on-site consultations, educational programs and seminars, fellowships, and emergency conservation services.

### **Society of American Archivists** [archivists.org](http://archivists.org)

The Society of American Archivists is the oldest North American and largest national professional association dedicated to the needs and interests of archives and archivists. Its 6,200 members are archivists employed by governments, universities, businesses, libraries, and historical organizations. The website offers a searchable dictionary of archives terminology: <https://dictionary.archivists.org> as well as an “About Archives” tab that has sections on standards, archival organizations, archival consultants, and resources.

## Inventory Management

### **AAM Collections Stewardship** [collectionsstewardship.org](http://collectionsstewardship.org)

The American Alliance of Museums (AAM) Collections Stewardship is designed to empower Museum collections professionals, provides webinars and resources that advance standards and best practices for all aspects related to collections management.

### **Association of Registrars and Collection Specialists (ARCS)** [arcsinfo.org](http://arcsinfo.org)

The association provides networking, conference, and resources for registrars and collections specialists.

Buck, Rebecca A., and Jean Allman Gilmore. ***Museum Registration Methods***. 5th ed. Washington, DC: The AAM Press, 2010. Print. The most comprehensive text on Museum Registration and collection policies, protocols, and best practices.

## Digital Asset Management

### **Caring for Digital Materials: Preventing a Digital Dark Age**

[connectingtocollections.org/archivedigital](http://connectingtocollections.org/archivedigital)

Workshop materials hosted by Connecting to Collections Care, which provides a comprehensive list of organizations and resources related to digital preservation.

### **CMS and DAMS Solutions**

[nationalarchives.gov.uk/documents/archives/cms-dams-options-for-archives.xls](http://nationalarchives.gov.uk/documents/archives/cms-dams-options-for-archives.xls)

The UK National Archives keeps an analysis of CMS and DAM systems available for download.

### **DAM Capability Model** [casdam.com/dam-capability-model](http://casdam.com/dam-capability-model)

Designed to give the global community a tool to self-assess against the common measures for how an organization is doing with digital asset management implementation.

### **Digital Preservation Coalition** [dpconline.org](http://dpconline.org)

The organization provides resources for implementing good practice and standards that make digital preservation achievable. Their *Digital Preservation Handbook* is available for free from their website and is a highly recommended resource: [dpconline.org/handbook](http://dpconline.org/handbook). The DPC technology watch report *Personal Digital Archiving* is also recommended as it provides practical advice that individuals and artists can implement. For artists wanting to implement the digital preservation suggestions in [Chapter 6, “Creating an Artwork Inventory,” on page 69](#), this resource is highly recommended: [dpconline.org/docs/technology-watch-reports/1460-twr15-01/file](http://dpconline.org/docs/technology-watch-reports/1460-twr15-01/file).

Hunter, Gregory S. ***Developing and Maintaining Practical Archives: A How-to-Do-It Manual***. 2nd ed. New York: Neal-Schuman, 2003. Print. Reference for establishing archives for smaller entities. Easy to follow information on archival arrangement and establishing archives in general.

### **Library of Congress Personal Digital Archiving** [digitalpreservation.gov/personalarchiving](http://digitalpreservation.gov/personalarchiving)

Handouts and resources designed for individuals, includes information on scanning, digitization, and digital preservation.



### **Minnesota Historical Society: Electronic Records Management Guidelines**

[mnhs.org/preserve/records/electronicrecords/erfnaming.php](https://mnhs.org/preserve/records/electronicrecords/erfnaming.php)

Key concepts behind digital records management including resources regarding File Naming Conventions and implementation.

### **NDSA Levels of Digital Preservation** [ndsa.org/publications/levels-of-digital-preservation](https://ndsa.org/publications/levels-of-digital-preservation)

NDSA details how to ensure you are not just storing digital assets but actively preserving them. For studios that are ready, this resource will help you to build a comprehensive storage strategy.

### **Preserving Digital Objects With Restricted Resources (POWRR)**

[digitalpowrr.niu.edu/digital-preservation-101](https://digitalpowrr.niu.edu/digital-preservation-101)

POWRR endeavors to make digital preservation more accessible to cultural heritage professionals. They provide practical and incremental steps for implementing digital preservation at your organization.

### **UC Davis Library: Data Management Page**

[library.ucdavis.edu/service/research-data-services/describe-2](https://library.ucdavis.edu/service/research-data-services/describe-2)

UC Davis lists free applications that will assist with bulk file renaming once you have established your File Naming Convention.

## **Legal Reference**

Crawford, Tad. ***Business and Legal Forms for Fine Artists***. 4th ed. New York: Allworth Press, 2014. Print. A collection of sample business forms commonly used by fine artists, including invoices, purchase and sale agreements, liability releases, gallery contracts, and more. What sets Crawford's book apart from others like it is that the documents also include the author's annotations explaining the meaning and significance of key terms.

Crawford, Tad, and M.J. Bogatin. ***Legal Guide for the Visual Artist***. 6th ed. New York: Allworth Press, 2022. Print. A legal reference guide for professional working visual artists covering a wide variety of business-related legal topics, such as copyright, contracts, taxes, and estate planning, among many others.

### **National Directory of Volunteer Lawyers for the Arts Organizations**

[vlany.org/national-directory-of-volunteer-lawyers-for-the-arts](https://vlany.org/national-directory-of-volunteer-lawyers-for-the-arts)

Most legal issues are best addressed in a one-on-one conversation with a lawyer. There is a large network of volunteer lawyers for the arts (VLA) organizations throughout the U.S. that provide pro bono and low-fee attorney referrals to working artists. In addition, many of these VLA programs provide educational workshops and resources for artists.

### **U.S. Copyright Office** [copyright.gov](https://copyright.gov)

The U.S. Copyright Office oversees the administration of copyright policy in the U.S., including registration of copyrights for protected creative works. The Copyright Office offers a plethora of valuable information on copyright law and policy to the public. Among the most valuable resources provided by the Copyright Office are the Copyright "Circulars," a series of short, user-friendly (and free) guides covering dozens of common copyright topics, from basic protection to registration of specific types of works.

# Glossary

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**Acid Free:** Material that yields a neutral pH of 7 or slightly higher on the pH scale.

**Antivirus Software:** A type of utility used for scanning and removing viruses from your computer. While many types of antivirus programs exist, their primary purpose is to protect computers from viruses and remove any viruses that are found.

**Archival:** Material with good aging properties and a neutral or slightly alkaline pH.

**Archive or Archives:** A collection of physical or digital ephemera of all sorts that is historic and static. Archival objects (letters, sales invoices, exhibition pamphlets, etc.) are saved purposefully because they provide historic evidence.

**Backup:** A copy of one or more files created as an alternate in case the original data is lost or becomes unusable. For example, you may save backup files in case a hard drive fails.

**Browser:** A program people use to access the World Wide Web. It interprets HTML code, including text, images, hypertext links, Javascript, and Java applets. After rendering the HTML code, the browser displays a nicely formatted page. Some common browsers are Google Chrome, Mozilla Firefox, Microsoft Edge, and Apple Safari.

**Byte:** Unit of measurement used to measure data. A group of binary digits or bits (usually eight) operate as a unit or byte. One byte contains eight binary bits, or a series of eight zeros and ones. Such a group is a unit of memory size.

**Career Documentation:** Collecting, collating, and organizing supporting material and records pertaining to an artist's career for future reference. This may include photographs, audio and video recordings.

**Cloud:** Metaphor for the Internet. The phrase "cloud computing" means a type of Internet-based computing, where different services (servers, storage, and applications) are delivered to computers and devices through the Internet.

**Collection:** A set of archival contents or (more commonly) materials assembled by a person, organization, or repository from a variety of sources.

**Collection Management:** The supervision and organization of collected artworks, which may include their copyrights and provenance.

**Compact Digital:** Portable cameras particularly suitable for casual snapshots. Compact digitals are usually designed to be easy to use, sacrificing advanced features and picture quality for compactness and simplicity.

**Compression:** Reduces the size of one or more files. When a file is compressed, it takes up less disk space than an uncompressed version and can be transferred to other systems more quickly. Compression is often used to save disk space and reduce the time needed to transfer files over the Internet.

**Condition Report:** Documentation detailing an artwork's complete physical appearance.

**Conservation:** The preservation of art and objects through examination, documentation, treatment, and prevention.

**Cursor:** Mouse pointer on screen.

**Data Entry:** Each piece of information entered for each field.

**Data/Program Migration:** The act of digitally moving all program and related files from one computer to another.

**Database:** A computer program which collects data (information) on a specific topic that is stored in an organized manner. Most databases contain multiple tables, which may each include several different fields. For example, a company database may include tables for products, employees, and financial records. Each of these tables would have different fields that are relevant to the information stored in the table.

**Database Field:** A single category of information for which data is given in each individual record.

**Database File:** The entire database is also known as a database file.

**Database Record:** All information listed for one particular item (person, place, or thing) in the database file.

**Database Search/Find:** An operation to locate a specific record(s) that satisfies a statement or statements of criteria.

**Database Template:** Pattern or form that is used repeatedly for each record in a database file. When creating a database, the template is the blank form that comes up each time you add a new record to the database.

**Desktop:** The primary user interface of a computer. When you boot up your computer, the desktop is displayed once the startup process is complete. It includes the desktop background (or wallpaper) and icons of files and folders you may have saved to the desktop. In Windows, the desktop includes a task bar, which is located at the bottom of the screen by default. In Mac OS X, the desktop includes a menu bar at the top of the screen and the Dock at the bottom.

**Digital Asset:** A binary content-rich file.

**Digital Asset Management System (DAM):** A database designed for organizing, storing, and retrieving rich media, including photos, music, videos, and other multimedia content with the infrastructure to preserve and manage digital assets and their metadata.

## Digital Image Preservation

**Workflow:** Image preservation is not simply the activity of backing up digital files, rather it is a series of activities to preserve the context and origin of those files. A digital image preservation workflow is a standardized series of replicable tasks for organizing and preserving your digital image and its context.

**Download:** To transfer data or programs from a server or host computer to one's own computer or device.

**Drag-and-Drop:** A common action performed within a graphical user interface. It involves moving the cursor over an object, selecting it, and moving it to a new location.

**Drop-Down Menu:** Horizontal list of options that each contain a vertical menu. When you roll over or click one of the primary options in a drop-down menu, a list of choices will "drop down" below the main menu.

**DSLR:** Digital single-lens reflex cameras combining the optics and the mechanisms of a single-lens reflex camera with a digital imaging sensor, as opposed to photographic film.

**Emergency Preparedness:** Instruction or documentation of response actions for a disaster in the studio. Forming safety and action plans in case of flood, fire, or other related disaster. See [studioprotector.org](http://studioprotector.org)

**File:** A collection of data stored in one unit, identified by a filename. It can be a document, picture, audio or video stream, data library, application, or other collection of data.

**File Extension:** The suffix at the end of a filename that indicates what type of file it is. For example, in the filename "myreport.txt," the .txt is the file extension. It indicates the file is a text document. Some other examples include .docx, which is used for Microsoft Word documents, and .psd, which is the standard file extension for Photoshop documents.

**File Format:** Defines the structure and type of data stored in a file. The structure of a typical file may include a header, metadata, saved content, and an end-of-file (EOF) marker. The data stored in the file depends on the purpose of the file format. Some files, such as XML files, are used to store lists of items, while others, such as JPEG image files simply contain a block of data. Some file format extensions are: Document files: DOCs, RTF (Rich Text Format), and PDFs. Image files: JPEGs, GIFs, BMPs, and PSDs. Audio files: MP3s, AACs, WAVs, and AIFFs. Video files: MPEG, MOV, WMV, or DV formats.

**File Naming Convention:** A structured way to name files so that critical metadata lives with the file.

**File Structure Hierarchy:** A file folder map pointing to where your digital assets are located. A File Structure Hierarchy can contain important metadata about an image such as "Exhibition" or "Year Created."

**Filename:** A text string that identifies a file. Every file stored on a computer's hard disk has a filename that helps identify the file within a given folder. Therefore, each file within a specific folder must have a different filename, while files in different folders can have the same name.

**Gigabyte:** One billion bytes. A unit of computer memory or data storage capacity equal to 1,024 megabytes.

**Hard Disk:** When you save data or install programs on your computer, the information is typically written to your hard disk. The hard disk is a spindle of magnetic disks, called platters, that record and store information. Because the data is stored magnetically, information recorded to the hard disk remains intact after you turn your computer off. This is an important distinction between the hard disk and RAM, or memory, which is reset when the computer's power is turned off.

**Host:** A web hosting service is a type of Internet hosting service that allows individuals and organizations to make their own website accessible on the Internet. Websites are hosted or stored on servers.

**Hyperlink:** A word, phrase, picture, or icon in a computer document on which a user may click to move to another part of the document or to another document.

**Import:** A command typically located within a program's File menu (File/Import...). Like the standard File/Open... command, Import is used for opening files, but it serves a more specific purpose. Instead of opening standard file types, Import is often used for importing parts of files, program settings, plug-ins, or other unconventional file formats. Some programs allow "drag-and-drop" from one file to another without having to import files.

**Install:** To install or load a program onto your computer before use. You can install a program or software update from a file downloaded from the Internet or from a hard drive or disc.

**Intern:** A student or a recent graduate undergoing supervised practical training in a working environment.

**Inventory:** A listing of your artwork. It is not considered part of the archive because its status is very much subject to change—artwork can be sold or given away and no longer a part of the artist's collection.

**JPEG:** A format for compressing images.

**Kilobyte:** A unit of memory or data. The kilobyte (abbreviated "k" or "kb") is the smallest unit of measurement greater than a byte. It precedes the megabyte, which contains 1,000,000 bytes.

**Legacy Specialist:** A highly skilled expert in aiding the advancement and preservation of an artist's career.

**Megabyte:** A unit of memory or data that is one million bytes. One megabyte (abbreviated "MB") is equal to 1,000 kilobytes and precedes the gigabyte unit of measurement.

**Metadata:** Provides information about a certain item's content. For example, an image may include metadata that describes how large the picture is, the color depth, the image resolution, and when the image was created. A text document's metadata may contain information about how long the document is, who the author is, when the document was written, and a short summary of the document.

**Microsoft Excel:** A spreadsheet program.

**Operating System:** OS is software that communicates with the hardware and allows other programs to run. It is comprised of system software, or the fundamental files your computer needs to boot up and function. Every desktop computer, tablet, and smartphone includes an operating system that provides basic functionality for the device.

**PDF:** (Portable Document Format) a multi-platform file format developed by Adobe Systems. A PDF file captures document text, fonts, images, and even formatting of documents from a variety of applications. You can email a PDF document to your friend and it will look the same way on her screen as it looks on yours, even if she has a Mac and you have a PC. Since PDFs contain color-accurate information, they should also print the same way they look on your screen.

**pH:** A measurement of acidity in archival materials.

**Pixel:** A minute area of illumination on a display screen, one of many from which an image is composed.

**Preservation Policy:** Rules or guidelines for safe handling, wrapping, and storing artworks using archival and acid-free materials.

**RAM:** (Random Access Memory) Small memory chips that form a memory module. These modules are installed in the RAM slots on the motherboard of your computer.

**RAW:** A raw file is a collection of unprocessed data. This means the file has not been altered, compressed, or manipulated in any way by the computer. Raw files are often used as data files by software programs that load and process the data. A popular type of raw file is “Camera RAW,” which is generated by a digital camera. Instead of processing the image captured by the camera, the data is left unprocessed and uncompressed until it is opened with a computer program.

**Remote Computer/Access:** Logging into one computer from another over a network or the Internet to access files and run programs. Commonly used as a remote teaching tool.

**Resolution:** The term to describe the number of dots, or pixels, used to display an image. Higher resolutions mean that more pixels are used to create the image, resulting in a crisper, cleaner image.

**Restoration:** The act of repairing a damaged artwork to its original condition.

**Server:** A computer or computer program that manages access to a centralized resource or service in a network.

**Spreadsheet:** A document that stores data in a grid of horizontal rows and vertical columns. Rows are typically labeled using numbers (1, 2, 3, etc.), while columns are labeled with letters (A, B, C, etc). Individual row/column locations, such as C3 or B12, are referred to as cells. Each cell can each store a unique instance of data. By entering data into a spreadsheet, information can be stored in a more structured way than using plain text. The row/column structure also allows the data to be analyzed using formulas and calculations.

**Studio Assistant:** A person who aids or supplements an artist. Tasks may include mixing paint, photographing artwork, and walking a dog. See also intern.

**Studio Guide:** A pamphlet or drawing offering basic information or instruction about an artist's studio. A studio guide may contain safety instructions, emergency preparedness information, location of materials and artworks, and tips for fixing the fax machine.

**Studio Manager:** A person in charge of studio business affairs. Studio managers handle email, schedules, phone calls, employees, and potentially sales, contracts, and more.

**Terabyte:** A unit of memory or data. One terabyte (abbreviated “TB”) is equal to 1,000 gigabytes and precedes the petabyte unit of measurement. A terabyte is exactly 1 trillion bytes.

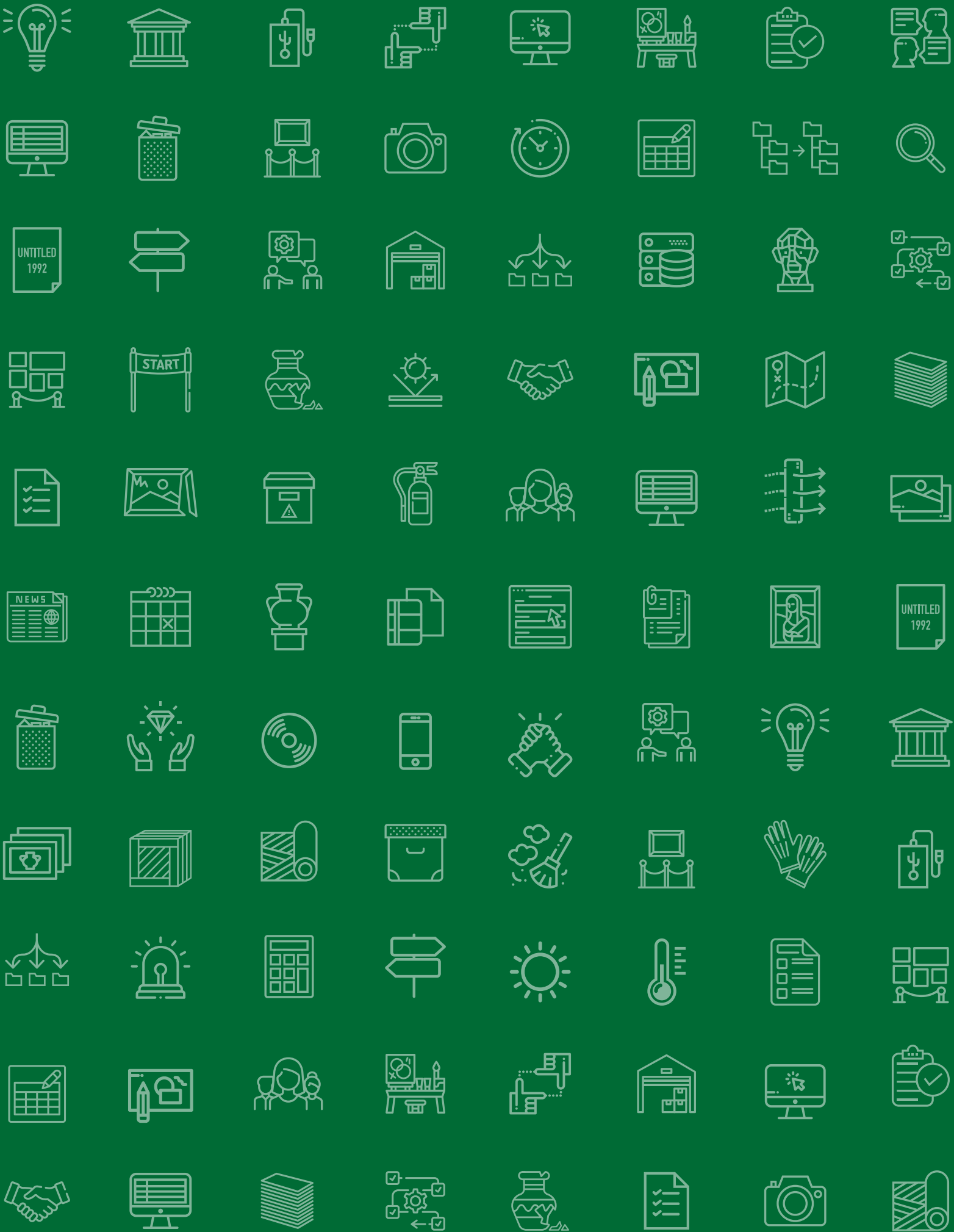
**Thumbnail:** A small image that represents a larger one. Thumbnails are often used to provide snapshots of several images in a single space. They are commonly used by digital photo organization programs as well as visual search engines.

**TIFF:** Originally standing for Tagged Image File Format, is a file format for storing uncompressed images, popular among graphic artists, the publishing industry, and both amateur and professional photographers.

**Upload:** To transfer (data or programs), from one's own computer or device to a server or host computer.

**URL:** (Uniform Resource Locator) The address of a World Wide Web page. A protocol for specifying addresses on the Internet.

**Web Site:** A group of World Wide Web pages usually containing hyperlinks to each other and made available online by an individual, company, educational institution, government, or organization.





# About This Publication

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## Joan Mitchell Foundation

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The Joan Mitchell Foundation cultivates the study and appreciation of artist Joan Mitchell's life and work, while fulfilling her wish to provide resources and opportunities for visual artists. Through its work, the Foundation affirms and amplifies artists' essential contributions to society.

As the chief steward of Mitchell's legacy, the Foundation manages a collection of Mitchell's artwork and archives containing her personal papers, photographs, sketchbooks, and other historical materials. Foundation staff are dedicated to assisting researchers and sharing information about the Foundation's artwork and archival collections in order to further scholarship and appreciation for Mitchell's life and work. The Foundation regularly partners with institutions to ensure that a wide and diverse audience has access to Mitchell's artworks, through exhibitions, educational activities, and public programming.

In 2015, the Foundation established the Joan Mitchell Catalogue Raisonné project in order to research Joan Mitchell's paintings. This long-term research project will result in a multivolume scholarly book that documents the entirety of the artist's painted work.

Fulfilling Mitchell's mandate to "aid and assist" living artists, over the past twenty-eight years the Foundation has evolved a range of initiatives that have directly supported more than 1,100 visual artists at varying stages of their careers. Today, the Joan Mitchell Fellowship awards annual unrestricted grants of \$60,000 directly to artists, with funds distributed over a five-year period alongside dedicated and flexible professional development. The New Orleans-based Joan Mitchell Center hosts residencies for national and local artists, as well as artist talks, open studio events, and other public programs that encourage dialogue and exchange with the local community. The Creating a Living Legacy (CALL) initiative provides free, essential resources to help artists of all ages organize, document, and manage their artwork and careers. Together, these programs actively engage with working artists as they develop and expand their practices.

For more information, visit [joanmitchellfoundation.org](http://joanmitchellfoundation.org).

# Creating a Living Legacy

For more than a decade, the Foundation has worked closely with artists, arts professionals, and legal experts to develop the career documentation, inventory management, and legacy planning tools that are now available to the public through the Creating a Living Legacy (CALL) initiative. The following timeline reflects key program strategies and outcomes.



## 2007–2017 Direct Support for Artist Legacy Planning and Career Documentation

The Foundation began its work with grants and hands-on assistance to four pilot artists over three years: Mildred Howard; Elemore Morgan, Jr.; Jaune Quick-to-See Smith; and Freddy Rodríguez. These artists' pilot case studies informed a support program that over ten subsequent years combined the use of technology, strategic planning, skill-building, and grant assistance to empower more than seventy artists to take ownership of the documentation and preservation of their life's work and personal legacies.

Clockwise from top left: Mildred Howard, Elemore Morgan, Jr., Jaune Quick-to-See Smith, and Freddy Rodríguez.



## 2007–2018 CALL Database

The Foundation developed a custom-built, artist-centered, relational database in the FileMaker platform for CALL-supported artists to store and connect artwork inventory, exhibition history, contacts, bibliography, and other professional information. The CALL artist database was informed in part by the Foundation's development of a custom database to document Joan Mitchell's artwork. In recognition of the increasing number of artist inventory software programs, the Foundation reversed its plans for software distribution, and in 2018 concluded all software upgrades and user support on its existing database.

Legacy Specialists working with CALL Database in the studio of Jaune Quick-to-See Smith, 2012.



## 2010–2015 Curriculum Development and Training

Understanding the value of hands-on assistance, the Foundation developed a legacy specialist curriculum, which offered introductory-level training in career documentation, studio organization, and inventory management. Over five years, the program cultivated a group of knowledgeable and qualified artists able to document their own work and be of service to their peers and the field. In 2013, the Foundation expanded training to young adult legacy apprentices, encouraging intergenerational mentoring and job skills development.

Legacy Specialist Alex Unthank working with CALL Artist Marcos Dimas in his studio.

## 2012–2016 CALL Regranting to Partner Organizations

The Foundation sought to seed CALL programs nationally to assist in the preservation of artists' legacies within their own contexts and communities. Multiyear grants were awarded to four artist-centered organizations to help them adapt the CALL model: Artist Trust (Seattle, Washington), Bronx Council on the Arts (Bronx, New York), DiverseWorks (Houston, Texas), and Space One Eleven (Birmingham, Alabama). The organizations ran local programs until 2016, and collectively supported thirty visual artists.



## 2012–Present Guides and Workbooks

Since 2012, the Foundation has been committed to developing accessible, effective tools to create estate and legacy plans specific to the needs of visual artists. These tools include a Career Documentation Guide; an Estate Planning Workbook for Visual Artists; a complementary tool for Attorneys and Executors authored by partner organization Arts & Business Council of Greater Boston; as well as this current revised Career Documentation Guide.



## 2015–2022 CALL/VoCA Artist Talks

Recognizing the artist's voice as essential to the understanding of their practice and legacy, the Foundation partnered with VoCA (Voices in Contemporary Art) to produce an annual series of in-depth interviews with artists who participated in the CALL program. Most talks were presented publicly, with edited video recordings available online; they are also preserved with full transcripts accessible at the NYU Fales Library. All twenty CALL/VoCA Talks can be viewed in their entirety at [joanmitchellfoundation.org/callvocatalks](http://joanmitchellfoundation.org/callvocatalks).

CALL/VoCA Talk featuring artist Tara Sabharwal, interviewed by Robin Clark at Fales Library & Special Collections, NYU, 2018. Photo by Taylor Dafoe.



## Current Strategic Priorities

In 2019, the Foundation established core priorities for our continued work to advance artist legacy planning: We remain committed to providing artists with information resources developed through the CALL program to encourage, honor, and preserve a lifetime of work through intentional legacy planning.

We recognize the importance of galvanizing the field to actively and innovatively support artist legacy planning, particularly for Black, Indigenous, Latinx, Asian, LGBTQ+, Disabled and Women artists; such work requires developing and engaging with an expanding network. We will continue to advocate in the field for increased investment in artist legacy planning and stewardship, working to ensure a diversity of artist perspectives in future history.

This second edition of the CALL Career Documentation Guide, an update to the Foundation's important publication, reaches beyond our own fieldwork to feature a range of professional voices in the artist legacy and the archives fields.

We hope it proves valuable to your own efforts, and we welcome your feedback.

## CALL Publications

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***Career Documentation for the Visual Artist: An Archive Planning Workbook and Resource Guide.*** Published by the Joan Mitchell Foundation, 2012. Reprinted with minor edits in 2015. Retired in 2022; replaced by this Guide.

***Estate Planning Workbook for Visual Artists.*** Jim Grace and Megan Low, published by the Joan Mitchell Foundation / Arts & Business Council of Greater Boston, 2015. <https://www.joanmitchellfoundation.org/estate-planning-for-visual-artists>

***Estate Planning for Visual Artists: A Workbook for Attorneys & Executors.*** Jim Grace and Megan Low, published by the Joan Mitchell Foundation / Arts & Business Council of Greater Boston, 2018. <https://www.joanmitchellfoundation.org/estate-planning-for-visual-artists-attorneys-executors>

# CALL/VoCA Talks

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All twenty of the CALL/VoCA Talks can be viewed in their entirety at [joanmitchellfoundation.org/callvocataalks](http://joanmitchellfoundation.org/callvocataalks).

## 2015

**Arlan Huang**  
with Beth Krebs and  
Robin Clark

**Juan Sánchez**  
with Jennifer Hickey

**Emmett Wigglesworth**  
with Christie Mitchell

**Mimi Smith**  
with Christie Mitchell

## 2017

**Gwen Fabricant**  
with Jennifer Hickey

**Mario Martinez**  
with Steven O'Banion

**Tara Sabharwal**  
with Robin Clark

**Marcos Dimas**  
with Jonathan Allen

## 2019

**Ted Kurahara**  
with Arlan Huang

**Lesley Dill**  
with Robin Clark

**Lehna Huie**  
**Beth Krebs**  
Legacy Specialists  
panel moderated by  
Christie Mitchell

## 2016

**Jaime Davidovich**  
with Steven O'Banion

**Blane de St. Croix**  
with Robin Clark

**Otto Neals**  
with Jonathan Allen

**Henrietta Mantooth**  
with Jennifer Hickey

## 2018

**Christy Rupp**  
with Jonathan Allen

**Antonia Perez**  
**Rose Nestler**  
**Julia Rooney**  
Legacy Specialists  
panel moderated by  
Kendra Roth

## 2020

**Gladys Triana**  
with Ruth del Fresno-Guillem

**Freddy Rodríguez**  
with Yasmeen Siddiqui

**Mildred Howard**  
with Lori Fogarty



# Contributors

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## Virginia Allison-Reinhardt

CHAPTER 6, "CREATING AN ARTWORK INVENTORY,"  
PAGE 69

CHAPTER 7, "MANAGING YOUR DIGITAL IMAGE  
ASSETS," PAGE 89

Virginia Allison-Reinhardt is a seasoned, service-oriented information management professional with demonstrated expertise in art and design archives. Virginia is Senior Digital Asset Archivist with Blizzard Entertainment; in this capacity she supports game developer teams and other creative operations within the company to preserve their digital assets. Virginia is currently completing a certificate in digital asset management from Rutgers University. Her passion work in educating artists and small organizations about archival principles and collection management systems has resulted in her founding a coalition of experienced archivists under the moniker "Original Order."

## Luke Blackadar

"EXPERT OPINION: THE SIGNIFICANCE OF A CONTRACT  
OR AN AGREEMENT," PAGE 147

As Deputy Director of Legal Services, Luke Blackadar manages the Arts & Business Council's legal programming, including its Volunteer Lawyers for the Arts, Patent Pro Bono, and educational programs. As a visual artist and intellectual property attorney, he is passionate about serving small businesses and creative entrepreneurs. Luke has extensive experience counseling start-ups and creatives around the country in trademark, copyright, and business law matters. He regularly speaks on intellectual property and business law issues at organizations including Lesley University, Massachusetts College of Art and Design, Brown University, and National Arts Strategies. Luke is a graduate of Clark University and Northeastern University School of Law.

## Rose Candela

CHAPTER 2, "BEGINNING THE CAREER  
DOCUMENTATION PROCESS: SETTING PRIORITIES AND  
GOALS," PAGE 15

Rose Candela is a mother, artist, content writer, and current graduate student in library and information science.

Her professional interests include evaluating censorship in public archives and crafting strategies for living artists to organize their time and work.

In her downtime, Rose enjoys exploring watercolors, reading historical fiction, and mastering her technique on the playground monkey bars

## Catherine Czacki

"PERSPECTIVE: MAKING ROOM AND TIME FOR THE  
EMOTIONAL PARTS OF THE JOURNEY," PAGE 20

Catherine Czacki, PhD, is an artist, educator, writer, and musician based in Las Vegas, New Mexico. Czacki's poetry, essays, and academic writing have been published by Line Script Diary, *Haunt Journal of Art* at UC Irvine, *Resolving Host*, and *Interactions Journal of Education and Information Studies* at UCLA. *Creosote*, a book of Czacki's poetry and images, was published in 2019. Czacki's art has been exhibited nationally and internationally at galleries and museums including SculptureCenter in Long Island City, JOAN in Los Angeles, Best Practice in San Diego, the Prague Biennale, and Centro de Arte Pepe Espaliú, in Córdoba, Spain. Czacki has attended various research and artistic residencies including Terra Foundation for American Art in Giverny, France, and SOMA in Mexico City. Czacki plays with the Llano Estacado Monad Band, a collective of sound makers, artists, and musicians in the Southwest.



## Steven G. Fullwood

CHAPTER 5, "TAKING STOCK AND MAPPING YOUR ARCHIVAL LEGACY," PAGE 57

Steven G. Fullwood is an archivist, writer, and editor. He is cofounder of the Nomadic Archivists Project, an initiative that partners with organizations, institutions, and individuals to establish, preserve, and enhance collections that explore the African Diasporic experience. Fullwood is the former associate curator of the Manuscripts, Archives and Rare Books Division at the Schomburg Center for Research in Black Culture. He is also the founder of the In the Life Archive, a project to collect, preserve, and make available to the public materials produced by and about LGBTQ people of African descent. Fullwood's published works include *Black Gay Genius: Answering Joseph Beam's Call* (coedited with Charles Stephens, 2014), and *Carry the Word* (coedited with Lisa C. Moore, 2007).

## Jim Grace

"EXPERT OPINION: THE SIGNIFICANCE OF A CONTRACT OR AN AGREEMENT," PAGE 147

Jim Grace is the Executive Director of the Arts & Business Council of Greater Boston (A&BC). He was the Executive Director of the Volunteer Lawyers for the Arts of Massachusetts from 1998 until 2008, when it merged with the A&BC. Jim has extensive experience working with artists and arts organizations in the areas of public art and social practice art projects, copyright, nonprofit incorporation and mergers, nonprofit boards and real estate development of creative spaces. Jim was an adjunct professor for BU's master in arts administration program for five years where he co-taught a course on legal issues in arts administration. Currently, Jim teaches workshops locally and nationally on a variety of legal and artist professional development topics. He serves on the boards of the Brookline Community Foundation, and the American Institutes for Research (AIR), Washington, DC, as well as the advisory board

of Brain Arts Org and The Record Co., and is a founding board member of the Arts Services Coalition and the Fort Point Cultural Coalition (the developer of Midway Studios, eighty-nine units of artist live/work space in downtown Boston). He previously served on the board of Philanthropy Massachusetts and the Private Sector Council of Americans for the Arts.

## Margaret Graham

CHAPTER 10, "CAPTURING YOUR CAREER MAP AND TIMELINE," PAGE 129

Margaret Graham joined the VoCA team in 2013. As Program Director, she oversees the planning and execution of the organization's various program streams, from managing the VoCA Workshops and Talks to editing *VoCA Journal* and the VoCA Blog. Margaret has also worked as a freelance project consultant, providing critical content, program management, and web and social media support to clients such as The Artist Archives Initiative at NYU, Cromwell Art LLC, and the Association of Professional Art Advisors (APAA). In addition, she is an independent art critic and has contributed essays to exhibition catalogues, including *Alex Katz: This is Now* (2015) at the High Museum of Art and *Jules Olitski: Plexiglas, 1986* (2016) at Paul Kasmin Gallery. From 2013–2017, she was a contributing writer and Artseen editor at *The Brooklyn Rail*, and she has been a member of the Program Committee of the NY Chapter of ArtTable since 2020. Margaret has her master's degree in art writing from the School of Visual Arts and her bachelor's degree in art history and creative writing from Bucknell University.

## Elaine Grogan Luttrull

CHAPTER 4, "BUDGETING FOR YOUR INVENTORY PRACTICE," PAGE 39

Elaine Grogan Luttrull, CPA-PFS, AFC® is the founder of Minerva Financial Arts, a company devoted to building financial literacy

and empowerment in creative individuals and organizations. Her workshops and presentations have been featured nationally by groups that support the arts, including Sundance, Americans for the Arts, the Lark Play Development Center, Theatre Communications Group, the Pew Center for Arts & Heritage, the Joan Mitchell Foundation, Creative Capital, the National YoungArts Foundation, and a variety of state arts councils and commissions.

Elaine teaches at the Columbus College of Art & Design, where she served as the department head for business and entrepreneurship from 2014–18, and regularly guest lectures at colleges, universities, and conservatories that serve the arts, including the Juilliard School, New England Conservatory, the School of Visual Arts, and the Cleveland Institute of Art. Previously, Elaine served as the Director of Financial Analysis for The Juilliard School and in the Transaction Advisory Services practice of Ernst & Young in New York.

Elaine is the author of *Arts & Numbers* (Agate B2, 2013), and she has contributed regularly to industry guides, including *Professional Artist* magazine and *Business of Art* from the Center for Cultural Innovation. She is based in Dublin, Ohio (Kaskaskia and Hopewell indigenous and cultural lands) where she serves on the boards of the Short North Alliance and Healing Broken Circles. Previous board service includes Social Ventures, the Financial Therapy Association, and the Lark Play Development Center.

## Deidre Hamlar

CHAPTER 3, "CASE STUDY: AMINAH BRENDA LYNN ROBINSON," PAGE 30

Deidre Hamlar is a lawyer, arts administrator, artist's representative, and independent curator. Hamlar earned a bachelor of arts in sociology from UCLA and a juris doctor degree from Howard University Law School. Hamlar's passion to merge social justice with the arts and to support artists who do so led her to positions in arts administration with

the Columbus Museum of Art, the Walker Art Center in Minneapolis, The King Arts Complex of Columbus, Ohio, and to consult with various small arts organizations nationwide.

Hamlar has worked with the Columbus Museum of Art since 2018 to sort and archive the art, books, and writings Aminah Robinson entrusted to the Museum, at her passing in 2015. Hamlar co-curated, with Carole Genshaft, *Raggin' On: The Art of Aminah Brenda Lynn Robinson's House and Journals*, November 2020–October 2021, and contributed to the catalogue of the same name. Hamlar assisted with the preservation of Aminah Robinson's home studio, and with Carole Genshaft and the Greater Columbus Arts Council, developed a residency and fellowship program for African American artists and writers to live and work in the renovated home. In 2021, Hamlar became director of the Aminah Robinson Legacy Project working to expand Aminah Robinson's inspirational reach worldwide.

## Tempestt Hazel

CHAPTER 11, "A LOVE NOTE FROM THE OTHER SIDE," PAGE 142

Tempestt Hazel is a curator, writer, and cofounder of *Sixty Inches From Center*, a Chicago-based arts publication and archiving initiative that has promoted and preserved the practices of artists across the Midwest since 2010. She's also still smiling about the fact that she was the 2019 recipient of the J. Franklin Jameson Archival Advocacy Award from the Society of American Archivists. You can read her writing, explore her curatorial projects, and learn about her love of archives by visiting her website at [tempestthazel.com](http://tempestthazel.com).

## LaStarsha McGarity

CHAPTER 9, "DRAFTING A PRESERVATION PLAN,"  
PAGE 107

LaStarsha is the Andrew W. Mellon Fellow in Objects Conservation at the National Gallery of Art in Washington, DC, and a Preservation Studies PhD student at the University of Delaware. She received a BA in art with a minor in chemistry from Texas Southern University (HBCU), in Houston, and an MA with a Certificate of Advanced Study in art conservation from the Garman Art Conservation Department at SUNY Buffalo State College, in Buffalo, New York. Her preservation work experience includes Texas Southern University, the Cleveland Museum of Art, the Smithsonian's National Museum of African American History and Culture, and the Smithsonian's National Museum of African Art, the Mississippi Civil Rights Museum, and the Museum of Mississippi History (2MM), the Brooklyn Museum, the Saint Louis Art Museum, and the Academy Museum of Motion Pictures. As a conservator, she has pushed to redefine diversity in the field and worked to advance engagement with underrepresented institutions and demographics.

## Sharon Mizota

CHAPTER 8, "HOW TO CREATE YOUR  
BIBLIOGRAPHY," PAGE 101

Sharon Mizota is a metadata consultant with more than ten years of experience managing metadata for arts organizations. She helps archives, museums, libraries, and web projects transform and share their metadata to improve diversity, equity, and inclusion in the historical record. She is also an art critic, a recipient of an Andy Warhol Foundation Arts Writers' Grant, and a coauthor of the award-winning book *Fresh Talk/Daring Gazes: Conversations on Asian American Art*. She lives in Los Angeles.

## Jennifer Patiño

CHAPTER 11, "MAKING CONNECTIONS," PAGE 141

Jennifer Patiño is a community archivist, librarian, and poet. She has been supporting Sixty Inches From Center's archiving efforts in various capacities since 2010. She received her bachelor's degree in art history from Columbia College Chicago and her MLIS degree from the University of Illinois at Urbana-Champaign and was named a 2018 Spectrum Scholar.

## Antonia A. Perez

CHAPTER 3, "CREATING A SUPPORT SYSTEM AND  
WORK PLAN," PAGE 25

Antonia A. Perez is a mixed-media artist living and working in New York City. She has been a legacy specialist since 2015 and has worked as an artist educator for thirty years. In addition to making objects, she engages audiences in a variety of ways—through siting artworks and participating in performances in public places, holding workshops and art events that advocate for the environment. Her work has been on view at Good Naked Gallery in Brooklyn; the National Museum of Mexican Art in Chicago; Artspace, Raleigh, North Carolina; Hampden Gallery, Amherst, Massachusetts; Children's Museum of Manhattan, Cuchifritos Gallery, Sugar Hill Children's Museum of Art & Storytelling, the Museum of Art and Design, Art in Odd Places 2017, and El Museo del Barrio in New York City; Latimer House Museum and Queens Museum, Flushing. She is a 2016 recipient of the EFA Robert Blackburn Printmaking Workshop Studio Immersion Fellowship and the 2011 Marie Walsh Sharpe Space Program Award. She was a 2017 artist-in-residence at the Joan Mitchell Center in New Orleans and at the Children's Museum of Manhattan in 2018. She holds a BA in visual arts and arts education from Empire State College, SUNY, and a master of fine arts from Queens College, CUNY.

## Paul Mpagi Sepuya

CHAPTER 1, "FRAMING YOUR LEGACY," PAGE 9

Paul Mpagi Sepuya is a Los Angeles–based artist and associate professor in media arts at the University of California San Diego. He received a BFA from NYU's Tisch School of the Arts in 2004; and an MFA in photography from UCLA in 2016, and has taught at CalArts and Bard MFA. He worked as Artist Support Associate at Creative Capital Foundation, followed by Artist Support Director for the Joan Mitchell Foundation, where he helped initiate the Creating a Lasting Legacy Program; he later returned to Creative Capital as Grantmaking Coordinator. He has worked as an independent archive consultant with artists like Jacqueline Gourevitch, Glenn Ligon, and Carrie Mae Weems, and continues to informally advise artists about archiving and legacy concerns. Currently Sepuya serves on the board of Printed Matter, Inc., on the Advisory Boards for the Robert Giard Foundation and Fire Island Artist Residency, and is on the Hammer Museum's Artist Council.

Sepuya's work is in the permanent collections of the Los Angeles County Museum of Art, MOCA Los Angeles, the Museum of Modern Art, the Whitney Museum of American Art, the Guggenheim Museum, The Getty Museum, and The Studio Museum in Harlem, among others. Solo museum exhibitions include *Double Enclosure* at Fotomuseum Amsterdam (2018), *Paul Mpagi Sepuya*, a survey of work from 2006–2018 presented at the Contemporary Art Museum St. Louis and University of Houston Blaffer Art Museum (2019), and accompanied by a monograph published by CAM St. Louis and Aperture Foundation, and *Drop Scene* at Bemis Center for Contemporary Arts (2020). Recent museum exhibitions also include a project for the 2019 Whitney Biennial, *Being: New Photography 2018* at the Museum of Modern Art, and *Trigger* at the New Museum New York City.

## Jan Wurm

CHAPTER 4, "BAY AREA WOMEN ARTISTS' LEGACY PROJECT: A CASE STUDY IN WORKING TOGETHER," PAGE 51

Jan Wurm is an artist, educator, and curator engaged in expanding the community forum for contemporary art dialogue. Wurm has taught for the University of California Berkeley Extension, ASUC Art Studio, and Osher Lifelong Learning Institute; and the Sommerakademie in Neumarkt, Austria; and has lectured extensively as a guest artist. Serving CalArts Alumnx group, she organized and moderated six annual symposiums, and organized a five-year artist lecture series for the Berkeley Art Center.

Exhibited internationally, her work is in the collections of the Fine Arts Museums of San Francisco Achenbach Foundation for Graphic Arts, the Berkeley Art Museum and Pacific Film Archive, the New York Public Library Print Collection, Archive Verein der Berliner Künstlerinnen in Berlin, and Universität für angewandte Kunst in Vienna. As past Director of Exhibitions and Curator of Art at the Richmond Art Center, Wurm's projects included *Closely Considered: Diebenkorn in Berkeley*, *Mildred Howard: Spirit and Matter*, and *David Park: Personal Perspectives*, among others. Wurm founded the Berkeley Art Project for curatorial, educational, and historical projects.

# Publication Editors

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## Shervone Neckles-Ortiz

As Artist Programs Manager, Professional Development at the Joan Mitchell Foundation, Shervone Neckles-Ortiz manages both the Creating a Living Legacy (CALL) Program and the Professional Development Program. At the Foundation, Neckles-Ortiz has developed a suite of resources such as publications, audio guides, and archived public talks for Fellows, alumni, artists, and other arts professionals for the long-term planning and preservation of artworks and careers. Previously, she worked as an arts educator, art education consultant, professor, and department chair for Pratt Institute and the NYC Department of Education.

As an interdisciplinary artist, Neckles-Ortiz uses repurposed materials and Afro-Caribbean sensibilities to retell histories and mythologies. Her work has been shown nationally in venues including Newhouse Center for Contemporary Art at Snug Harbor, Staten Island NY; Morris Museum, Morristown, NJ; The For Colored Girls Museum, Philadelphia; and Weeksville Heritage Center, Brooklyn as well as internationally in India, Australia, and Italy. In 2019, she was featured as part of the Venice Biennale's Grenada Pavilion. She has also participated in residencies such as the Youlou Arts Foundation in St. Vincent and the Grenadines, WI; Dieu Donné Workspace Residency, NY; Wave Hill, NY; Robert Rauschenberg Foundation, FL; The Elizabeth Foundation's SHIFT Program, NY; Center for Book Arts, NY; The Skowhegan School of Painting & Sculpture, ME, among others. She has received awards from The Pollock-Krasner Foundation, Queens Council on the Arts, Foundation for Contemporary Arts, and Joan Mitchell Foundation. Her work has been written about in *Artnet*, *BOMB*, *Hyperallergic*, *Huffington Post*, and the *New York Times*. Her work can be seen at [shervoneneckles.com](http://shervoneneckles.com).

## Kay Takeda

Kay Takeda served as Deputy Director, Artist Programs at the Joan Mitchell Foundation from 2018 to February 2022, and is currently the Executive Director of the Foundation for Contemporary Arts. In her role at Joan Mitchell Foundation, she oversaw the Foundation's diverse roster of artist-centered initiatives, including its grants, residencies, and professional development programs. As part of the executive team, she spearheaded Foundation strategies to refine the focus and enhance the impact of program offerings as an essential facet of Mitchell's legacy.

Takeda has worked for over twenty-five years to advance artists and the arts sector. In her previous role as Vice President, Grants & Services at LMCC, she developed and oversaw grantmaking, professional development programs, and community initiatives. She designed and guided the implementation of LMCC's \$5 million Downtown Cultural Grants Initiative, expanded its long-standing Manhattan Arts Grants, and led a renewed focus on professional development programs for artists and organizations. Prior to joining LMCC, Takeda led national grantmaking programs at Arts International and managed exhibitions and programming at the Newhouse Center for Contemporary Art at Snug Harbor. She serves on the board of Movement Research, frequently sits on funding panels, and lectures widely on professional issues affecting artists.



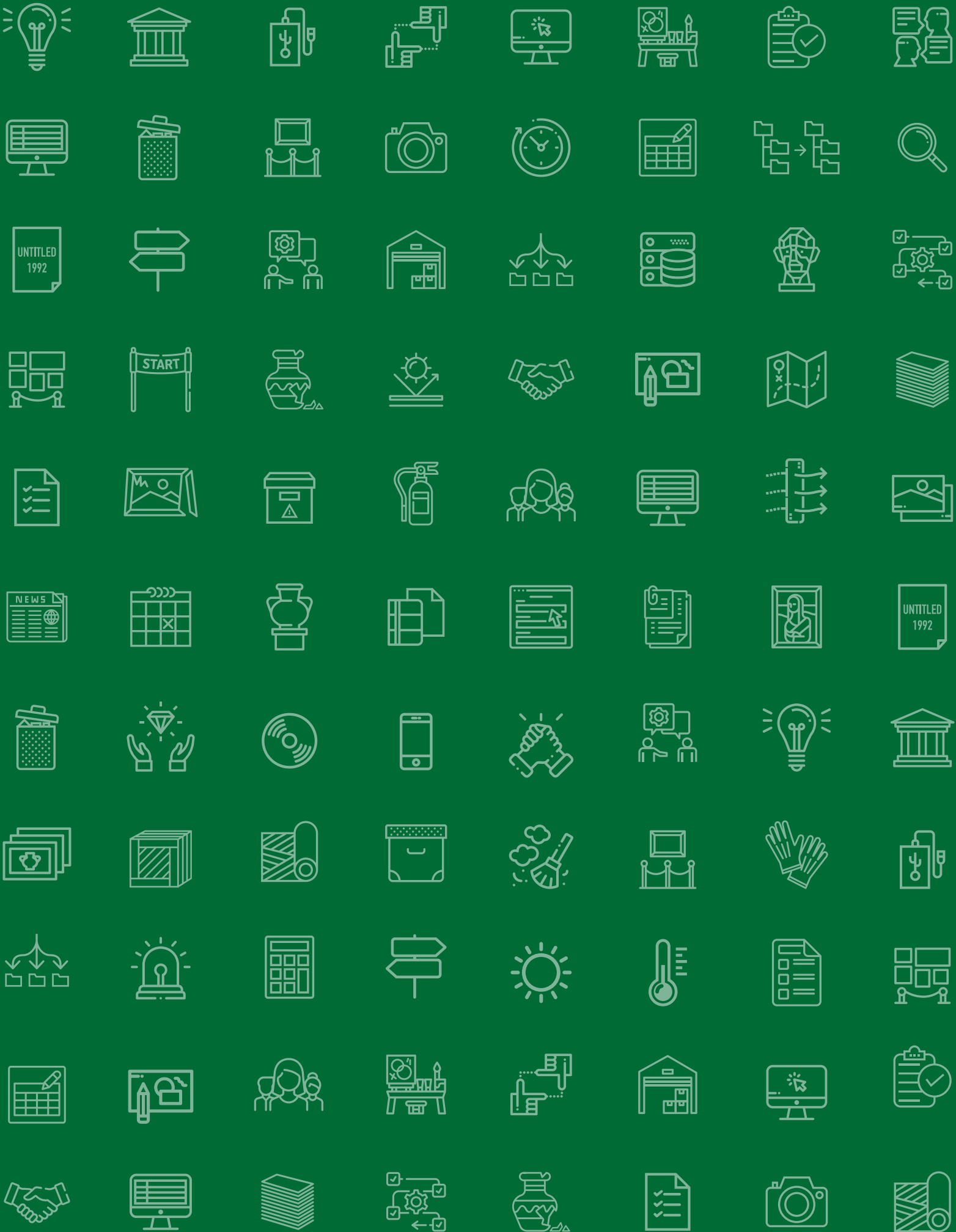
# Acknowledgments

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In addition to these contributors, the Foundation would also like to acknowledge the help of the following list of supporters for making this publication possible:

Jonathan Allen	Jennifer Hickey	Debra Priestly
Neal Ambrose-Smith	Mildred Howard	Jaune Quick-to-See-Smith
Sanchita Balachandran	Arlan Huang	Freddy Rodríguez
Andrew Beccone	Kemi Illesanmi	Christy Rupp
Derrick Biney-Amissah	Astrid Kaemmerling	Tara Sabharwal
Joey Cabrera	Beth Krebs	Juan Sánchez
Marc Chennault	Ted Kurahara	Lauren Shadford
Mel Chin	Miranda Lash	Jean Shin
Robin Clark	Sandy S. Lee	Aimee Solomon
Jim Coddington	Marley B. Lewis	Lilia Sterling
Pamela Council	Analú María López	Jill Sterrett
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Marcos Dimas	Elemore Morgan, Jr.	Alexandra Unthank
Nico Dregni	Laura Morris	Linda Usdin
Reginald Eldridge, Jr.	Sameen Naqvi	Estate Philippe Vandenberg
Krista Fabian DeCastro	Steven O'Banion	Suzi Villiger
Gwen Fabricant	Aay Preston-Myint	Heather Whitehead
Jenny Gill	Megan Pasko	Emmett Wigglesworth





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