



Collections Assessment
for Preservation

Site Questionnaire

This questionnaire will help your institution and your assessors prepare for the site visit. Answer each question to the best of your ability, engaging additional staff members as necessary. Your assessors will use this questionnaire as a guide during the pre-visit phone call and site visit. You should be prepared to provide additional information (or identify the best member of your staff to provide that information) on these topics as requested by your assessors.

Please review the information you provided in your application. If any information has changed, please describe the changes below.

Your assessors may request copies of additional information before the site visit. In anticipation of those requests, please indicate if you have access to any of the following: *(check all that apply)*

- Organizational chart
- Collections management policy[^]
- Collections management forms (such as accession[^] forms, temporary custody forms, loan forms, reproduction and use policies, etc.)
- Collections inventory[^]
- Copies of previous reports (such as collections assessments, building assessments, preservation[^] or conservation[^] plans, studies from prior work, etc.)
- Emergency Preparedness Plan[^]
- Architectural drawings
- HVAC specifications
- Data logger files[^]
- Annual building maintenance plan
- Photographs of the site
- Pest management protocol



General Information

Institution Name: _____
 Web address: _____
 Project Contact Name: _____
 Phone: _____
 Email: _____

Organizational Structure

Is your organization governed by a board? Yes No

If yes, how many members are on the board? _____
 What is their term of service? _____ years

Does your institution operate seasonally? Yes No

If yes, please provide a phone number where you can be reached in the off-season.

What hours is your institution open to the public each day? Please be as specific as possible, indicating any changes by day of the week or season. (e.g. - From May 1 through September 30, we are open from 10 a.m. to 7 p.m. all 7 days per week. From October 1 through April 30, we are open from 10 a.m. to 5 p.m. on Tuesday through Sunday only.)

Building Concerns

Is there is a history of recurring problems in any of the following areas? (Check all that apply.)

- basement flooding/wet basement
- wall condensation
- window condensation/leaks
- roof leaks
- plumbing leaks
- cold water pipe condensation
- stained walls
- stained ceilings
- electrical problems
- blown fuses/tripped circuits
- exterior structural problems
- interior structural problems
- flooding on grounds
- other facility problems (*specify*):

Pest Control

Has your institution ever had a pest problem (insects, rodents, birds, bats, etc.)?

Yes No

If yes, please describe the type of pest and what (if anything) has been done to address the problem.

Have you ever observed mold, mildew, or fungi on or around collections?

Yes No

If yes, what (if anything) has been done to address the problem?

Do you have a pest management (prevention and control) program?

Yes No

Do you hold special events (such as parties, receptions, rental events, etc.)?

Yes No

If yes, where?

Where is food prepared or consumed in the building?

Security

Within the last five years, has there been vandalism at your site?
 Yes No

Do you have any of the follow security measures for the collections? (*check all that apply*)

- locks on storage doors
- locked gates/cages
- assigned keys
- locked exhibition cases
- sign in/out logs
- closed circuit television
- perimeter alarms
- security guards
- restricted entry systems (e.g. - key cards or fobs)
- other (*specify*): _____

Emergency Preparedness

Has any part of the collection been damaged by natural or other disasters in the past five years?

Yes No

If yes, explain:

Do you have a written emergency preparedness plan^ that includes directives for the collections?

Yes In development No Don't know

Do you have insurance policies for the collections?

Yes In development No Don't know

Do you maintain off-site records/photographs of the collections?

Yes No

If yes, where? _____

Do all buildings have smoke alarms? Yes No

Do you have a fire detection that reports directly to the fire department or security

company? Yes No

Do you have a fire suppression system? Yes No

If yes, what type of fire suppression system do you have? (*Check all that apply.*)

wet pipe sprinkler system

dry pipe sprinkler system

gas fire suppression system, such as Halon

hand-held extinguishers, such as ABC, water, or CO2

Other (specify): _____

Questions for Museums and Historic Sites

Collections Control

Approximately what percentage of the permanent collection is:

Inventoried ^ _____%

Cataloged ^ _____%

Are any collections materials used in hands-on, educational activities? Yes

No

If yes, what types of objects are used for this purpose?

Loans

Does your museum lend objects to or borrow from other institutions? Yes

No

If yes, approximately what percentage of objects currently on display in exhibitions are borrowed from other institutions? _____%

Does your staff perform condition reports ^ before and after the loan of objects?

Yes No

Does your museum use a contract that specifies terms for the loan of objects?

Yes No

If yes, does the contract include insurance provisions?

Yes No

Staff Training

Which person is primarily responsible for collections care? (*List name and title*) _____

Does this person's job description reflect these activities?

Yes No Don't know Not applicable

Is there a conservator ^ on staff? Yes No

Is formal training provided for staff (paid or nonpaid) in any of the following areas?

collections preservation ^ activities	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable
object handling	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable
labeling/marking objects	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable
packing/unpacking techniques	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable
building maintenance and repair	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable

general housekeeping and cleaning applicable Yes No Not applicable

Please use this space to share any additional information about staff training.

Conservation Activities

Does your museum have a long-range conservation plan for collections?

Yes Plan under development No Don't know

Have you ever obtained conservation services on a contractual basis?

Yes No

If yes, how often have you obtained conservation services in the past 5 years? (check one)

0 times 1-2 times 3-5 times More than 5 times

Exhibitions

Approximately what percentage of the collection is typically on exhibition?

_____ %

Are there permanent exhibitions? Yes No

If yes, are objects in permanent exhibitions rotated on and off exhibit?

Yes No

Are there temporary exhibitions? Yes No

If yes, how often do the temporary exhibitions change?

Are collections materials displayed in areas other than the exhibition galleries (e.g., offices, entrance, outdoors, offsite, etc.)? Yes No

If yes, where?

Storage

Are storage spaces organized by: (*check all that apply*)

- size
- material
- accession ^ number/collection number
- object type
- not organized
- other (*specify*): _____

Who has access to storage areas?

Are collections storage areas used for other purposes (such as office space, cataloging, etc.)?

- Yes No

If yes, describe:

Does your museum have temporary storage or preparation areas?

- Yes No

Climate Control and Environment

Do buildings that house collections have a central heating, ventilating, and air conditioning (HVAC) system? Yes, **ALL** buildings that house collections have HVAC systems

- Yes, **SOME** buildings that house collections have HVAC systems
- No buildings have HVAC systems

Do any buildings with an HVAC system have separate temperature zones within the centralized system? Yes No

Do any buildings with an HVAC system have separate humidity zones within the centralized system? Yes No

Do you believe the system is working properly?

- Yes No

What are the typical temperature and humidity set points for collections storage and exhibition areas? _____

Are there different settings for evening/unoccupied times?

Yes No

Is there an air filtration system connected to the HVAC system? Yes No

Are any of the following used in the building: (*check all that apply*)

- portable humidifier
- portable dehumidifier
- space heater
- window air conditioner

Are doors and/or windows ever propped open? Yes No

Are environmental conditions monitored in any part of the building? Yes
 No

If so, what type of monitoring equipment is used? (*Check all that apply.*)

- thermometers
- sling psychrometer
- hygrometers
- recording hygrothermographs
- thermo-hygrometers
- data loggers
- battery operated psychrometer
- other (*specify*): _____

Illumination

What types of lighting are used in exhibition and storage spaces? (*Check the boxes for all that apply.*)

	Natural Daylight	Fluorescent Light	Incandescent light	Tungsten halogen	LED
Exhibition spaces					
Storage spaces					

Is UV filtration installed in any part of the building? Yes No

Are light levels monitored in any part of the building? Yes No

If yes, where?

- all areas with collections (exhibits, storage, etc.)
- some areas with collections, but not all

If yes, what light monitoring equipment do you use? (*Check all that apply.*)

- footcandle or lux meter
- photo light meter
- surface temperature thermometer
- ultraviolet (UV meter)

Questions for Arboreta and Botanical Gardens

Greenhouse Information

What type of environmental control is used in your greenhouse(s)?

single zone multiple zones

If multiple zones, number of independently controlled zones _____

What form of ventilation is used in your greenhouse(s)?

vents fans screens other

Does the greenhouse have low and high temperature alarms? Yes No

Does the greenhouse have a backup heating and power generating capacity?

Yes No

Collections and Collections Policies

Approximately what percentage of the permanent living collection is inventoried? ^ _____%

What do you believe to be threats to the collection? (*check all that apply*)

- invasive plants
- overuse of trails
- erosion
- diseases
- air pollution
- urban sprawl
- severe weather/storms
- vandalism
- severe animal browse
- insects
- other (*specify*): _____

Does the institution lend objects to or borrow from other institutions? Yes

No

If yes, does the institution use a contract that specifies terms for the loan of objects?

Yes No

If yes, does the contract include insurance provisions?
 Yes No

Do you track plant records through a digital software system? Yes No

If yes, which software? _____

Staff Training

Which person is primarily responsible for collections care? (*List name and title*) _____

Does this person's job description reflect these activities?
 Yes No Don't know Not applicable

Is formal training provided for staff (paid or nonpaid) in any of the following areas?

collections care	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable
labeling/marketing specimen	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable
environmental management	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable
building maintenance and repair	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable
general housekeeping and cleaning	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable

Please use this space to share any additional information about staff training.

Questions for Zoos and Aquariums

Collections and Collections Policies

Is your institution accredited by the Association of Zoos and Aquariums? Yes No

Approximately what percentage of the permanent collection is inventoried? ^
_____ %

What was the date of the last inventory?

How does your institution maintain animal records? (*check all that apply*)
 paper computer/digital

Does your institution have a policy of disposition of surplus animals?

Yes No

Staff

Does your institution employ a full-time veterinarian? Yes No
If not, how are veterinary needs met?

How often does a vet visit?

How many full-time animal care specialists are on staff? _____

How many part-time animal care specialists are on staff? _____

Loans

Does your organization lend objects to or borrow from other institutions?
Yes No

If yes, does your organization use a contract that specifies terms for the loan of objects?

Yes No

If yes, does the contract include insurance provisions?

Yes No

Climate Control and Environment

Do all buildings that house collections have a central heating, ventilating, and air conditioning (HVAC) system? Yes No

Do you believe the systems are working properly? Yes No

Are environmental conditions monitored in any part of the buildings? Yes
 No

If so, what type of monitoring equipment is used?

- thermometers
- sling psychrometer
- hygrometers
- recording hygrothermographs
- thermo-hygrometers
- data loggers

□ battery operated psychrometer