



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



# General Information

Institution Name: \_\_\_\_\_  
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? \_\_\_\_\_

Do board members have term limits?  Yes  No

If yes, what is their term of service? \_\_\_\_\_ years

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    Don't know

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    Don't know

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

Are insecticides used?  Yes    No    Don't know

If yes, where and how often are they applied?

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

Yes    No

**If yes, please describe your pest management program.**

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Is food prepared, stored, or consumed in the building or on site?  Yes    No

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

Yes    No

If yes, where?

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## Security

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
- video security cameras
- perimeter alarms
- security guards
- restricted entry systems (e.g. - key cards or fobs)
- other (*specify*): \_\_\_\_\_

Have you ever experienced a theft of your collections?    Yes    No

Within the last five years, has there been vandalism or accidental damage due to improper use (touching, climbing) at your site?  Yes  No

## 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:

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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 duplicate records/photographs of the collections offsite or stored in a cloud-based system?

Yes  No

If yes, where are they stored?  Cloud  In a physical location off-site

(Specify: \_\_\_\_\_)

How often are they backed up?

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Do all buildings have smoke alarms?  Yes  No

Do you have a fire detection system 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 ^ \_\_\_\_\_%

photographed ^ \_\_\_\_\_%

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

No

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

**Do you have collection objects that are located outdoors (e.g. - sculpture, farm equipment, transportation vehicles, etc.)?**

Yes  No

If yes, please describe your outdoor collections. \_\_\_\_\_

\_\_\_\_\_

## 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

Please use this space to share any additional information about loans.

## 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 training provided for staff and volunteers in any of the following areas? Training may include onsite training by museum supervisor, webinars, workshops, etc.

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/marketing 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	<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.

### 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

If yes, how often are objects rotated?

\_\_\_\_\_

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
- taxon
- no formal organization system
- other (*specify*): \_\_\_\_\_

Who has access to storage areas?

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Are collections storage areas used for other purposes (such as office space, cataloging, storing of non-collections related items, etc.)?

- Yes     No

If yes, describe:

Does your museum have temporary storage or preparation areas?

- Yes     No

If yes, please describe:

### **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.

Which buildings have HVAC? \_\_\_\_\_

- 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 areas? \_\_\_\_\_

What are the typical temperature and humidity set points for EXHIBITION areas? \_\_\_\_\_

Are there different settings for evening/unoccupied times in collections and exhibition spaces?

- Yes    No    Yes, in some areas

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  
If yes, where?

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)

Please use this space to describe any additional concerns you may have related to the care of your collections.

## 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



labeling/marking 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 applicable	<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.

Please use this space to describe any additional concerns you may have related to the care of your collections.

If you are having an assessment of nonliving collections, please also complete the Questions for Nonliving Collections.

## 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*)  
 on paper/manually  by computer/digitally

Does your institution have a policy of disposition of surplus animals?  
 Yes  No

Do you have an agreement with another institution (s) for the temporary housing and care of living collections in the event of an emergency?  
 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 collections to or borrow from other institutions?  
 Yes  No

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

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

If yes, 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

Please use this space to describe any additional concerns you may have related to the care of your collections.

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