



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.

Please indicate if you have access to any of the following. (*Check all that apply.*) Please begin to gather all of the items you select and consult with your assessors as soon as possible about the best way to share the information with them.

- Organizational chart
- Collections management policy
- Collections management forms (e.g., accession forms, temporary custody forms, loan forms, reproduction and use policies)
- Collections inventory
- Copies of previous reports (e.g., such as collections assessments, building assessments, preservation or conservation plans, studies from prior work)
- Emergency Preparedness Plan
- Architectural drawings, original blueprints, or floor plans with rooms identified

- Other building records, such as a history of construction, changes, or previous repair projects
- HVAC specifications
- Data logger files

- Building maintenance plan/maintenance reports
- Photographs of the site
- Pest management protocol
- Written job descriptions for staff/volunteers who work with collections

Use this space to expand upon or explain any answers above, as needed.

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

Visitorship

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., 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.*)

Approximately how many visitors do you receive annually? _____

Historic Structures

Are any of the buildings on the property listed on the National Register of Historic Places or designated a National Historic Landmark? Yes No

If yes, which building(s)? _____

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:* _____)

If yes, please explain:

Pest Control

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

- 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, please describe the problem and 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.

Where is food prepared, stored, or consumed on site?

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

- Yes No

If yes, where? _____

Security

Do you have any of the following 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

If yes, briefly explain. _____

Within the last five years, has there been vandalism or accidental damage due to improper use (touching, climbing) at your site?

- Yes No

If yes, briefly explain. _____

Emergency Preparedness

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

- Yes No

If yes, briefly 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 a climate resilience plan?

- 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? _____

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)?

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

- Yes No Not applicable

Object handling

- Yes No Not applicable

Labeling/marketing objects

- Yes No Not applicable

Packing/unpacking techniques

- Yes No Not applicable

Building maintenance and repair

- Yes No Not applicable

General housekeeping and cleaning

- 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 In 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

Are funds regularly expended on collections conservation at your institution?

- Yes No

If yes, how does your institution allocate funds for conservation? (*Check all that apply.*)

- Collections conservation is an item in our annual budget
 Funds are allocated in response to a need
 Funds are sought through grants or donations in response to a need
 Other: _____

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)?

- Yes No

If yes, where? _____

Storage

How are storage spaces organized? (*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? _____

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, 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

If no, please describe your observations or concerns:

What are the typical temperature and humidity set points for COLLECTIONS STORAGE areas? _____ Include a list of all spaces if set points are different in different areas/buildings.

What are the typical temperature and humidity set points for EXHIBITION areas? Include a list of all spaces if set points are different in different areas/buildings.

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

Is there a humidifier 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

If yes, please describe where they are located and what you are trying to achieve (e.g. - lower humidity, a dry basement, human comfort).

Are doors and/or windows ever propped open?

- Yes No

Are environmental conditions monitored in any part of the building(s)?

- 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(s)?

- Yes No

If yes, where? _____

Are light levels monitored in any part of the building(s)?

- 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, how many independently controlled zones are there?

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

- vents fans screens other (Specify: _____)

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? _____

Are funds regularly expended on collections conservation at your institution?

- Yes No

If yes, how does your institution allocate funds for conservation?
(Check all that apply.)

- Collections conservation is an item in our annual budget
 Funds are allocated in response to a need
 Funds are sought through grants or donations in response to a need
 Other: _____

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

Collections care

- Yes No Not applicable

Labeling/marketing specimen

- Yes No Not applicable

Environmental management

- Yes No Not applicable

Building maintenance and repair

- Yes No Not applicable

General housekeeping and cleaning

- Yes No 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 Museums and Historic Sites section.

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

Are funds regularly expended on collections conservation at your institution?

- Yes No

If yes, how does your institution allocate funds for conservation?
(*Check all that apply.*)

- Collections conservation is an item in our annual budget
 Funds are allocated in response to a need
 Funds are sought through grants or donations in response to a need
 Other: _____

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.

If you are having an assessment of nonliving collections, please also complete the Questions for Museums and Historic Sites section.
