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**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 appl*y.)

* 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
* Annual building maintenance plan
* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**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 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/marking 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

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

Collections care

🞐 Yes 🞐 No 🞐 Not applicable

Labeling/marking 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.