



# CONNECTING TO COLLECTIONS

## Assessment Checklist

The following assessment checklist is intended as a tool, not a test.

Use this checklist during the walk-through to:

- Understand staff and volunteer training needs
- Make a case for facilities improvements that will slow or prevent future damage
- Diagnose large-scale and/or pervasive problems at the collections level
- Assess overall storage and housing environments
- Help prepare an organization in case disaster strikes

Information gathered during the assessment can be used to prioritize up to five key action steps.

***Do note that not all of the questions listed in this checklist are appropriate for libraries, museums and archives. Be sure to review the checklist ahead of time, consider the type of organization you will be assessing, and only cover the areas that make the most sense.***

1. General Information	
Heritage Mentor Name:	
Date of Assessment:	
Name of the Organization:	
Address:	
Contact Person (Name and Title):	
Telephone Number:	
E-mail:	
Name of Staff (including title) and Volunteers Taking part in Walk-Through:	
General Notes of Building(s) and Collections:	
Goals of the Assessment (Why did the organization invite MentorCorps here?)	

## 2. Staff & Volunteer Training

(Is formal training/oversight provided for ... )

Handling and moving collections?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Labeling and marking collections?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Cataloging and processing collections?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Working with a collections management system?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Digitization and reformatting activities?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Building maintenance and repair?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Environmental monitoring?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Housekeeping?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Pest management?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Collections preservation activities?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Emergency preparedness?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

## 3. Sites & Structures

Has there been any electrical, plumbing, gas or structural issues in the past that might still pose a potential problem?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has condensation been observed on the windows or walls?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has the buildings insulation and vapor barrier systems been inspected to meet current energy code requirements?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are cracks in the walls and floors sealed?		
Have there been any issues with mold, mildew, or wood rot?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have there been issues with the roof leaking?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are roof drainage systems clean and free of obstructions?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is excess snow removed from the roof as it accumulates?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is your facility prone to flooding or is it within a flood plain?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does staff know where to turn off all utilities if building is threatened with flooding?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has the wiring and electric panels been inspected to insure that they meet current codes and that no deteriorated wires or devices remain that could cause a fire?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has there been an issue with pipes leaking?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are pipes monitored for leaks?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are exterior doors avoided for direct or indirect access to collections storage areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are there door sweeps installed on doors leading into collections storage areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If applicable, are chimneys and fireplaces kept clean?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are heating and ventilation ducts kept clean?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are attics and/or finished basements regularly cleaned?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are flammable materials (such as paint for galleries, solvents, cleaners) kept in a clearly labeled fire resistant cabinet?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

#### 4. Exhibits

Is there an exhibit gallery cleaning checklist available outlining tasks related to inspection and regular cleaning?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
For dusting collections on display, is use of abrasive cleaners such as feather dusters avoided?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
For dusting collections on display, are Dust Bunny (made of Tyvek and nylon), Dust-alls or dust swipes that have not been impregnated with cleaners used?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are guidelines established for display of artifacts?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are exhibit cases or artifacts on display out of the direct airflow from heating/cooling duct outlets, drafts and air leaks from windows?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are cases not placed directly against exterior walls (due to possible deficiencies in building insulation and vapor barrier systems)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are temporary display cases, mannequins or artifacts well out of the way of traffic areas and areas of high vibration?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are stanchion barriers used to keep visitors from getting too close and bumping into artifacts or displays?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Inside display cases, is wool felt (which gives off sulfur that will tarnish metals), nylon, or polyvinyl chloride (PVC) plastic products avoided?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are light levels monitored in exhibit galleries?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are exposure levels of up to 50 Lux for a display period not to exceed 90 days considered for works of art on paper and textiles?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are exposure levels of up to 200 Lux for a display period not to exceed one year considered for finished wood, painting on canvas, leather, and composites of similar materials?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are all light sensitive, organic objects restricted from being on display where they are exposed to sunlight from windows for any amount of time, even if the windows have UV film on it? (As opposed to inorganic materials such as stone, metals and ceramics which do not have exposure limits.)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is mylar used for creating a translucent barrier between permanent collections on display (ex.: vase resting directly on surface of table) to prevent scratching/abrasion?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are props and program use materials clearly labeled and easily distinguishable from permanent collections on display?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a Facility Report prepared and regularly updated?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

#### 5a. Climate Control & Environment

Is temperature and relative humidity (RH) monitored?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, are data loggers placed in collections storage and exhibit gallery areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is temperature and relative humidity adequately controlled in collections storage and exhibit gallery areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If dehumidifiers are used (in basements), are they plugged into surge protectors?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are UV films or filters placed on bulbs or lighting in collections storage and exhibit	Yes <input type="checkbox"/>	No <input type="checkbox"/>

gallery areas?		
Are curtains, blinds or other light reduction materials used to reduce the intensity of natural light entering the building?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are air quality (dust; gaseous pollution) issues considered?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
For mixed collections, is the storage area kept at the ideal 45% RH and between 68°-70° F?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
In a given year, are storage and exhibit areas at any point seeing dangerous spikes or significant fluctuations in RH and temperatures?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

### 5b. Pest Control

Are there rodents, insects, or arachnids (spiders) in the building?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are the rodents, insects, or spiders alive or dead upon discovery?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are the rodents, insects, or spiders many or only a few?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are the rodents, insects, or spiders widespread or restricted to one area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are there collections at risk?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Can the collections be isolated?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has there been a history of major outbreaks or infestations over the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are sticky traps regularly visually inspected, dated upon inspection, placed in all areas (collections storage, exhibit galleries, library stacks, reference rooms, offices, break rooms, lobbies, etc.), and replaced on a regular basis?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is a pest monitoring log completed?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are rodents (mice and rats), birds, insects (beetles, silverfish, booklice, clothes moths, cockroaches) and spiders monitored?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If previous or suspected infestations of beetles (carpet, powderpost, and other wood borers) have been present, are pheromone traps used for monitoring and detection?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are pest management services contracted out?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, does the service provider outline integrated pest management within the service contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do treatment options in the contract first consider non-chemical approaches such as freezing, heating, or anoxia?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are harsh chemical treatments (fumigation or insecticides not applied directly to objects) reserved as a last case scenario?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are plants restricted in the building?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are break room snacks and other foodstuff left overnight kept in sealed containers such as Tupperware?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are potential donations isolated and monitored for infestation before being introduced to collections storage areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is flash-freezing used if infestation is suspected or known to exist?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, are the appropriate material types for freezing considered and/or identified?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the freezer not feature a defrost cycle?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are the following at-risk organic materials in the collections monitored for	Yes <input type="checkbox"/>	No <input type="checkbox"/>

infestation: fur, hair, feathers, wool, silk, animal skins, insect specimens, parchment and vellum, plants and seeds, cotton batting, glue in book binding?		
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### 5c. Housekeeping

Has a Historic Housekeeping Handbook (for the maintenance of historic spaces or exhibit areas with collections on display) been provided to staff and/or volunteers?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has a cleaning schedule been established and is a housekeeping log being regularly updated?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has a cleaning manual for the maintenance of modern equipment and facilities (bathrooms, non-historic spaces, collections workrooms and storage areas, public galleries, etc.) been provided to staff and/or volunteers?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are cleaning services contracted?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, are contractors accompanied by staff into collection areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If cleaning services are contracted, are all equipment/supplies used by the contractor itemized and reviewed during the contract period?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are certain types of supplies specified or prohibited in the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are contractors prohibited from cleaning collections on display?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are cleaning tools, equipment and supplies kept in separate storage areas (away from historic spaces or artifacts) and clearly identified solely for that purpose?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are Material Safety Data Sheets (MSDS) made available to all staff and/or volunteers for all chemical products used on site?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are trash containers emptied daily?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is vacuuming or dusting being conducted daily, weekly, or biweekly?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a collections storage cleaning checklist available outlining tasks related to inspection and regular cleaning?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
When vacuuming in collections storage, is a HEPA filtered vacuum only used (to prevent dust from recirculating)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
In collections storage, are areas under and behind storage units regularly cleaned?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is wet mopping avoided in collections storage?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

### 6a. Collections Policies, Procedures, and Forms

Is there a Collections Management Policy?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, does the policy cover deaccessioning and disposal, loans including abandoned property, held-in-trust, props and/or program use materials, access, care and security?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
As required by NAGPRA, has the organization expeditiously transferred ownership and physical control of all materials to a tribe after the repatriation process established by law was completed?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
When accepting museum objects or archival records into the permanent collection are the following questions asked: Does it fit within the organization's collecting	Yes <input type="checkbox"/>	No <input type="checkbox"/>

mission? Can the organization properly care for the objects or records? Are the objects collected/imported legally and in conformity with all applicable international, national, state and local laws? Can the organization acquire valid and legal title without restrictions?		
Does the organization use a Temporary Custody Receipt?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do the conditions of the Temporary Custody Receipt release the organization from liability? From formally accepting the item on deposit? Does it allow the organization to, if necessary, assume legal title?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the organization use a Deed of Gift?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do the terms of acceptance outlined on the Deed of Gift consider all applicable Oregon State statutes?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the organization have a Transfer of Ownership form with clear terms of acceptance?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the organization have a Promised Gift form?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the organization have a Held-In-Trust Agreement with a clearly defined notice of conditions?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the organization have a Policy on Appraisers and Dealers which provides a general list of appraisers that are clearly disinterested third party professionals?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the organization have a Condition Report form?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is a Condition Report filled out when an object first enters the museum or archive?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is a Condition Report filled out when an object goes on loan, is put on exhibit, or is returned from loan or exhibit?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is a Condition Report filled out for insurance purposes or before conservation treatment?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
In the Condition Report, are the following examples of terms used: abrasion, accretion, buckling, embrittlement, flaking, foxing, fraying, stain, cracks, frayed edges, crease, insect damage, and mold?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the Condition Report use a scale for assessing an object's overall condition, such as: excellent (new, no flaws, never used), very good (no structural damage, slight wear), good (minor wear and insignificant signs of use), fair (minor structural flaws, still stable), poor (50% or more damages, missing, insecure, not physically sound)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections catalogued and entered into a collections management system such as Argus, Past Perfect, Multi MIMSY 2000, The Museum System (TMS), KE EMu or some other database?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a standardized Cataloging Worksheet provided for staff and volunteers?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are accession files updated with: correspondence with donor; Temporary Custody Receipt; Deed of Gift and reply envelope; thank you letters; printed emails and correspondence; appraisals, state documents, wills, tax documents; letters, photographs, articles, ephemera, etc.?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are there deaccession guidelines, a clearly defined deaccession process (including identification, review and approval), and a hierarchy for final disposition?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are all collections accessioned?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Are all collections cataloged?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections labeled according to best standards and practices for labeling?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a backlog?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are there hidden collections or unprocessed and uncataloged collections which are not accessible to researchers?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a plan in place to address the backlog and/or hidden collections which at least focuses on securing title and providing basic description in the collections management system for these items?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

#### 6b. Collections Care

Are white cotton or nitrile gloves used when appropriate?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is washing hands mandated prior to handling certain archival materials (such as textural records)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is Orvus paste (a non-ionic cleaning solution) used as an alternative to commercial laundry detergents for cleaning white cotton gloves and muslin?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
When using a regular washing machine, is it standard procedure to run two water-only cycles (to remove build up of soap scum) before cleaning white cotton gloves and muslin with (1/4 teaspoon per gallon of water of) Orvus paste?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
When cleaning collections, are HEPA filtered vacuums with low suction control and accessory kit attachments used?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
When cleaning collections such as textiles, is fiberglass window screening used as a barrier between a vacuum nozzle and the collections item?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
When lightly dusting collections, are only nonabrasive natural hair brushes (horse, sheep, hogs hair) used?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are corrosion intercept bags used for storage of silver, brass, ferrous and non-ferrous metals, copper, and bronze (such as coins, candles, small sculptures, tea sets)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a suspicion that collections (such as taxidermy collections dated prior to the 1970s) might have been treated in the past with metallic pesticides, preservatives or other substances that represent a potential hazard to the objects or persons handling the objects?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have wipe tests been conducted or a XRF scanner been used to detect the presence of lead, arsenic and mercury?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Based off of positive test results, have handling procedures been changed for these impacted collections and has a cleaning treatment been proposed or implemented?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have handling procedures been defined for photographs and other visual records such as: glass plate negatives, glass lantern slides, glass-encased 35mm slides, photographic prints, photographic slides, negatives, and transparencies, photograph albums, motion picture film, and microfilm and microfiche?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have handling procedures been defined for sound recordings such as: wax cylinders, disc sound recordings or records, acetates?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have handling procedures been defined for magnetic media such as: reel-to-reel, video cassettes, audio cassettes, computer diskettes, and digital audio tapes?	Yes <input type="checkbox"/>	No <input type="checkbox"/>



Have handling procedures been defined for optical disc media such as: CD-Rom, DVD, CD-RW (Compact Disk Rewritable), CD-R (Compact Disk-Recordable), WORM (Write-Once-Read-Media) and CD-DA (Compact Disc Digital Audio)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have handling procedures been defined for other archival holdings such as: postcards, prints, paintings and drawings, maps, plans, and architectural drawings, ephemera, newspapers, newspaper and magazine clippings, scrapbooks and books?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have handling procedures been defined for library reserve material?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have handling procedures been defined for other artifacts?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have highly flammable cellulose nitrate-based materials been identified in collection (such as negatives, x-ray films, 35mm film rolls, portrait and commercial sheet films, aerial films, film packs, roll films in sizes 616, 620, etc., and professional 35mm motion picture films dated between the 1890s and the 1950s)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, is there a plan for reformatting and disposal (which can include transferring to an institution capable of long-term preservation)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has long-term freezing been considered?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has cellulose acetate-based materials – from photographic negatives to record acetates to reel-to-reels to film stock – been assessed with Acid-Detecting Strips for the six stages of deterioration known as vinegar syndrome (named due to their vinegar-like smell)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do textual collections have inappropriate attachments like staples and paperclips?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is collections repair work only handled by trained conservators?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

## 6c. Collections Access

For sacred items, is there a sacred storage access policy in place?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
For sacred items, is there a ceremonial use policy in place (concerning burnings, offerings, cyclical access, etc.)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are policies and procedures in place governing access to permanent collections records that allow and guarantee public access to accession files?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is restricted information contained in permanent collections records (found in accession files) flagged and not made available to the general public?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the archival organization or museum with an archive have an Access Policy?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the policy consider the following principles: relevant legislation, sensitivity or confidentiality of records, protection of individual privacy, restrictions placed upon records by depositors, levels of access, physical condition of the records, security, and fees?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there an Access Application Form or Research Request Form available which spells out specific rules governing the behavior of researchers in the search or reading room?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a dedicated space or search room available for researchers?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are paper and pencils provided and pens, food, and beverages prohibited in the search or reading room?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is restricted information (social security numbers, privacy concerns, sensitive	Yes <input type="checkbox"/>	No <input type="checkbox"/>

materials, etc.) contained in archival collections clearly identified as “Restricted” and not made available to the general public either through research request or through the online catalog?		
Has the Freedom of Information Act and Privacy Laws been considered?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is copyright legislation considered when photocopying materials for patrons?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have digitization and reformatting procedures been outlined for photographs and other visual records such as: glass plate negatives, glass lantern slides, glass-encased 35mm slides, photographic prints, photographic slides, negatives, and transparencies, photograph albums, motion picture film, and microfilm and microfiche?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have digitization and reformatting procedures been outlined for sound recordings such as: wax cylinders, disc sound recordings or records, acetates?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have digitization and reformatting procedures been outlined for magnetic media such as: reel-to-reel, video cassettes, audio cassettes, computer diskettes, and digital audio tapes?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have digitization and reformatting procedures been outlined for optical disc media such as: CD-Rom, DVD, CD-RW (Compact Disk Rewritable), CD-R (Compact Disk-Recordable), WORM (Write-Once-Read-Media) and CD-DA (Compact Disc Digital Audio)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
In addition to a master copy, is a duplication copy and user copy made for access purposes?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

#### 6d. Collections Storage and Housing

Are foods or drinks not allowed in the storage area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are external sources of light eliminated?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are lights turned off when storage space is not in use?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are items not stored near furnace, radiators, pipes or other sources of water or heat?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are flammable materials not stored near the storage area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is a fire extinguisher ready for use near or in the storage area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections not stored in a basement or attic?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If collections are stored in a basement or attic, are these areas regularly inspected (for pests) and the environment monitored (for temperature and humidity)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are shelves padded?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are storage units elevated off the floor?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are free-standing collections elevated off the floor?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are mounts made for unstable or free-standing objects?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is open shelving secured with earthquake proofing straps?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have storage procedures been defined and housing supplies identified for textual records?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have storage procedures been defined and appropriate housing supplies identified for photographs and other visual records such as: glass plate negatives, glass lantern	Yes <input type="checkbox"/>	No <input type="checkbox"/>

slides, glass-encased 35mm slides, photographic prints, photographic slides, negatives, and transparencies, photograph albums, motion picture film, and microfilm and microfiche?		
Have storage procedures been defined and appropriate housing supplies identified for sound recordings such as: wax cylinders, disc sound recordings or records, acetates?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have storage procedures been defined and appropriate housing supplies identified for magnetic media such as: reel-to-reel, video cassettes, audio cassettes, computer diskettes, and digital audio tapes?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have storage procedures been defined and appropriate housing supplies identified for optical disc media such as: CD-Rom, DVD, CD-RW (Compact Disk Rewritable), CD-R (Compact Disk-Recordable), WORM (Write-Once-Read-Media) and CD-DA (Compact Disc Digital Audio)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have storage procedures been defined and appropriate housing supplies identified for other archival holdings such as: postcards, prints, paintings and drawings, maps, plans, and architectural drawings, ephemera, newspapers, newspaper and magazine clippings, scrapbooks and books?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have storage procedures been defined and appropriate housing supplies identified for other artifacts?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have storage procedures been defined and appropriate housing supplies identified for library reserve material?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections housed in non-archival acidic boxes or acidic containers and folders?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is a pH testing pen used when in doubt to determine if boxes or folders or interleaving papers are acidic or not?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are storage boxes too full or too loose?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are file folders too full?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections the wrong size or format for its current housing?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are there collections that need to be placed on shelves or in boxes, folders or drawers?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are carts (padded) available for moving large or fragile materials?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

## 7. Security & Insurance

Is there a security system?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections storage area(s) locked and otherwise accessible only by authorized staff?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a sign-in sheet or log monitoring entry and exit of collections storage areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections covered under a fine arts policy, inland marine policy, or any other type of insurance?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are incoming and outgoing loans, including collections in transit, covered by insurance?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are library reserve materials stored in a dedicated and secure area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections inventoried on a cyclical basis?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

When accessing collections and archives, is the public limited to the search or reading room and not allowed in storage areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is baggage checked in before access?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are keys for collections storage areas and cabinets kept in a secure lock box?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is access to collections storage areas and cabinets restricted to only necessary staff?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are volunteers always in the presence of or accompanied by staff when working with collections or accessing collections storage areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

## 8. Emergency Preparedness

Has the existing condition of your historic property or facility been documented with photographs?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you developed an Emergency Evacuation and Relocation Plan with designated evacuation routes and safe meeting areas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are evacuation drills with designated assembly points enacted on a regular basis?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are there safety procedures outlined for staff and volunteers for all emergency situations including: general evacuation, response to fire alarm or fire or smoke detection, earthquake, medical emergency, elevator stoppage (if applicable), criminal activity, power outage?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are procedures outlined to assist persons with disabilities or injuries?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do staff and volunteers know where to locate first aid kits and flashlights?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has staff been properly trained to use a fire extinguisher?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are fire extinguishers inspected on an annual basis?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are regular building inspections scheduled with the fire department?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are collections and exhibit galleries protected by automatic fire suppression?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is there a smoke detection system in place?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are master copies of reformatted collections (audio/visual materials of all media) kept in a climate controlled and secure environment off-site for preservation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are original accession ledgers kept off site for preservation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are electronic files, including catalog, backed up off site?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the organization have a written disaster plan for collections?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, does the plan include events such as accidental damage to collections, outbreaks of pests and mold growth, fire, power/HVAC failure, vandalism, and water damage?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Has the disaster plan been updated in the past 24 months (especially as it might pertain to the emergency call lists)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are copies of the plan distributed to appropriate staff?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is it clear who on staff is responsible for emergency response?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are there clear instructions for emergency personnel to follow during the phases of discovery, assessment and recovery?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the organization maintain emergency supplies for collections?	Yes <input type="checkbox"/>	No <input type="checkbox"/>