

Self-Assessment Survey for Wisconsin Historical Records Repositories

DRAFT

This self-assessment survey is designed to help your organization better understand how the archival material you hold in your collections is cared for and used. Mentors and organizations should work together in completing this form.

The survey is divided into three parts: Part A, Part B, and Part C. We hope everyone will be able to complete the entire survey during the expanded phase of the mentoring project. If this does not seem possible, you may choose any two of the three parts, depending upon which is most pertinent to your organization's situation and needs. You should complete at least two parts of the survey for the expanded phase of the mentoring project.

For any of the questions that ask you to describe practices, procedures, or programs, please attach additional sheets as necessary.

Note: If any question seems to be a repeat from your initial application, please use that information as your response. We do not want you to have to regenerate similar information. (*Examples of the Self-Assessment Surveys are available on the WHRAB website at: <http://www.shsw.wisc.edu/archives/whrab/mentoring/pilot/index.html>*).

PART A: Collection Storage Facilities

1. If your organization operates a building(s), or part of a building, what is the total amount of floor space available to your organization?

Square feet: _____

2. In approximately what year was the building in which your archival collections are stored constructed (if stored in more than one building list the approximate construction dates of each building)?

Main building year of construction: _____

Other buildings year of construction: _____

3. Regardless of where they are stored, how much space does it take to store the archival material owned or stored by your organization?

Square feet: _____

4. Is there sufficient space to store all of your archival collections in your main building?
___ yes ___ no

If no, and you have storage in other buildings, is the total amount of space sufficient?
___ yes ___ no

5. Is there extra space to accommodate future growth of archival collections?
___ yes ___ no

If yes, how much extra space?

Square feet: _____

If yes, in what building is the extra space located? _____

6. Is the area in which archival collections are stored heated?
___ yes ___ no ___ some

If some, estimate the percentage of collections stored in heated areas:

7. Is the area where the archival collections are stored air-conditioned?
___ yes ___ no ___ some

If some, estimate the percentage of collections stored in air-conditioned areas:

8. Are the heating and air conditioning set to keep the archival storage area at approximately 68 degrees Fahrenheit twenty-four hours a day?

___ yes ___ no ___ some

If some, estimate the percentage of the archival records stored in this environment:

9. Is there any form of humidity control (dehumidifiers or humidifiers) in the area in the area where archival records are stored?

yes no some

If yes or some, please describe the methods used to humidify or dehumidify the area(s) where archival collections are stored:

10. If there is humidity control, is the area where the archival records are stored kept at about 50% relative humidity?

yes no some

If some, estimate the percentage of the archival records stored in this environment:

11. Is the area in the building(s) where the archival collections are stored locked when no one is present?

yes no

If yes, who has keys to this area?

12. Is there a burglar alarm that would warn if someone tried to enter the locked building?

yes no

If yes, please describe the alarm system: _____

13. Is there any kind of fire or smoke alarm and fire suppression system or equipment in the building?

yes no

If yes, please describe: _____

14. Is the area where archival records are stored separate from public areas where researchers might use records, or where meetings take place?
___ yes ___ no

PART B: Archival Collections

15. What is the total volume of archival collections owned or stored by your organization?

Linear feet: _____

16. Are there signed deeds of gift giving these collections to your organization?

___ yes ___ no ___ some

If yes or some, please attach a copy of a typical deed of gift.

If some, estimate the percentage of collections that have signed deeds of gift:

17. Do you have a written policy statement to determine what kinds of archival collections your organization is interested in acquiring?

___ yes ___ no

If yes, please attach a copy.

If no, how do you make acquisition decisions? _____

18. In the past calendar year, what was the total amount of archival material (measured in linear feet):

Received or accessioned into your archives: _____

Arranged and described (processed): _____

19. Was this a more or less typical year?

yes no

If no, please explain what was unusual: _____

20. Are there written records of what was accessioned, who donated it, and if there were any conditions or restrictions attached to the gift?

yes no

If yes, please attach a sample accession record.

21. Once material is received, what is done to it? (Check all that apply)

given a specific shelf location where the material can be found

labeled with the name of the collection

reboxed if necessary

examined to make sure the material is worth keeping

examined to make sure the collection is in order

if disordered, steps are taken to put the collection back in order

22. Are there written descriptions of the collections in your archives?

yes no some

If yes or some, please attach a sample description.

If some, please estimate what percentage of your collections are described at the level of the sample you enclose. Percent: _____

23. If there are written descriptions, is there any way someone who was not physically in your community could conveniently see those descriptions (other than writing or calling and asking for them)?

yes no

If yes, how could someone find out about your holdings? _____

24. In addition to narrative description, do your archival collections have box and folder inventories?

yes no some

If some, please estimate the percentage of archival collections that have box and folder inventories.

PART C: Reference and Public Programs

25. What was the total number of persons who came to use your archival collections during the last calendar year?

26. What was the total number of daily visits during the last calendar year?

27. What was the total number of other reference activities (letters, telephone calls, e-mail) in the last calendar year?

28. Is anyone who comes to your archives permitted to use your archival collections?

yes no

If no, who is not permitted to use your collections? _____

29. Does the archives maintain regular hours on a posted schedule?

yes no at some times of the year

If yes, please attach a copy of the schedule; if a schedule is maintained for part of the year, please write what part on the schedule.

30. Is there a special area (room, table, etc.) set aside for the use of individuals who have asked to see archival collections?

yes no

If yes, please describe the special area: _____

31. Do you permit archival materials to be loaned?

yes no

If yes, under what conditions are loans made? _____

32. Do you permit researchers to copy archival materials?

___ yes ___ no

If yes, is a photocopier available in your building?

___ yes ___ no

Are researchers permitted to do the copying?

___ yes ___ no

33. Has your organization identified any specific groups that your archives attempts to serve?

___ yes ___ no

If yes, please identify the groups and explain why you have chosen to serve them. (Attach additional sheets if necessary):

34. Does your organization have a regularly scheduled series of programs in which the archives is featured or participates?

___ yes ___ no

If yes, please describe: _____

35. Does your organization publish books, pamphlets, or other printed materials in which materials from your archival collection are featured?

yes no

If yes, please enclose a list of publications and a recent example of one publication.

36. Does your organization create exhibits in which archival materials are featured?

yes no

If yes, please indicate the number of exhibits created during the past twelve months and describe one recent exhibit in detail.

37. Do you use original archival materials in the exhibits you create?

yes no not applicable

If yes, please describe the precautions you take to protect the archival materials from damage due to light, temperature, handling, or theft.

This survey was adapted from *Archives Assessment and Planning Workbook*, edited by Paul H. McCarthy (Chicago: Society of American Archivists, 1989) and "Taking Care of Historical Records Self-Assessment Questionnaire for Michigan Archival Repositories" (Michigan State Historical Records Advisory Board, 1995)