

Preliminary Assessment for Cultural Organizations

Introduction

About the Survey

This survey is an important opportunity for cultural institutions to identify their collections care needs and to help develop a statewide plan to meet these needs. You can complete the survey easily and quickly, without any preparation or research, relying just on what you know about your collections. Allow 10 minutes for small institutions and 20 or 30 minutes for large, complex ones.

Why Should You Participate?

- The data you provide will communicate the scope and nature of the preservation needs of collections statewide and will guide the efforts of decision-makers and funders to address those needs. Your help will ensure that our planning accurately identifies the needs of the state.
- We hope to apply for an implementation grant to assist Oklahoma cultural institutions in meeting their preservation needs. The best way to guarantee that your needs are represented is to complete the questionnaire.
- You will see your preservation needs in the context of those of your peers in a form that you can use as a tool for raising institutional awareness and promoting long-range planning for the care of collections.
- The aggregate results will be available for you to download from the Cultural Heritage Trust website (www.culturalheritagetrust.org). Also, your assistance will be acknowledged, with your permission, on that website.
- Your participation will show your support for IMLS and other federal agencies that are working on your behalf to meet preservation needs nationwide.

Acknowledgments

The survey instrument is an abbreviated and slightly modified version of the one developed for the Heritage Health Index (HHI) by *Heritage Preservation* in partnership with the *Institute of Museum and Library Services*. We are grateful to both organizations, as well as the *Minnesota Historical Society*, for sharing the survey they developed. This collaboration makes possible the direct comparison of preservation needs in Oklahoma with those nation-wide.

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Survey Instructions

Submitting the Survey

The survey is only available online. Paper responses are outside the scope of this project. Please submit your responses by July 1, 2008. We need your data by that time to inform the planning process.

Scope of the Questionnaire

- Complete the questionnaire for your institution.
- If you are part of a larger institution, fill out the survey only for your own holdings, not those of other collecting entities in your parent institution. They may receive their own surveys. For example, a library and a museum belonging to the same university may each receive separate surveys.
- If you are not under a parent institution, include information on all collections at your institution. For example, a museum that has its own library and archives should fill out one survey, including information on all of its museum, library, and archival holdings.
- Complete the questionnaire for collections that are a permanent part of your holdings or for which you have accepted preservation responsibility.

How to Complete the Questionnaire

- To complete the survey, just click on the appropriate box or type the requested information on the line (or in the space) provided.
- For questions that ask for a number or dollar amount, please provide your best estimate. Remember, these figures will constitute a state profile, so even a rough estimate is useful.
- Do not leave questions blank. If there are questions that you cannot answer, select "Don't Know." If there are questions that are not applicable to your institution, select "Not Applicable."
- Submit the survey by clicking on the submit button at the end of the questionnaire.
- Be sure to complete and submit the survey by **July 1, 2008**.

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Institutional Identifying Information

1. Institution Name:

2. Name of Parent Institution (if applicable):

3. Institution Address:

4. City:

5. State:

6. Zip:

7. Phone Number:

8. Fax Number:

9. Website Address (if applicable):

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Description of Collecting or Holding Institution

10. Which of the following most closely describes your primary function or service? (select one)

- Archives
- Library
- Museum
- Historical Society
- Historical Site/House
- Aquarium, Zoo, Arboretum, Botanical Garden, Nature Center, Archaeological repository, Planetarium

Other (please specify)

11. Which of the following most closely describes your institution's governance? (select one)

- College, university or other academic entity
- Non-profit, non-governmental organization or foundation
- Corporate or for-profit organization
- Federal
- State
- Local (county or municipal)
- Tribal

Environment

12. Do you use environmental controls to meet temperature specifications for the preservation of your collection? (select one)

- Yes, in all areas
- In some, but not all areas
- No, in no areas
- Not applicable
- Don't know

13. Do you use environmental controls to meet relative humidity specifications for the preservation of your collection? (select one)

- Yes, in all areas
- In some, but not all areas
- No, in no areas
- Don't know
- Not applicable

14. Do you control light levels to meet the specifications for the preservation of your collection? (select one)

- Yes, in all areas
- In some, but not all areas
- No, in no areas
- Don't know
- Not applicable

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Preservation Activities

15. Does your institution have a written, long-range preservation plan for the care of the collection (a document that describes a multi-year course of action to meet an institution's overall preservation needs for its collection)? (select one)

- Yes
- Yes, but it is not up-to-date
- No, but one is being developed
- No, but preservation is addressed in overall long-range plan
- No
- Don't know

16. Has a survey of the general condition of your collection been done (an assessment based on visual inspection of the collection and the areas where it is exhibited or held)? (select one)

- Yes
- Yes, but only of a portion of the collection
- Yes, but it is not up-to-date
- Yes, but only of a portion of the collection, and it is not up-to-date
- No
- Don't know

17. Does your institution have a written emergency/disaster plan that includes the collection? (select one)

- Yes
- Yes, but it is not up-to-date
- No, but one is being developed
- No
- Don't know

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18. If you have a written emergency/disaster plan, is your staff trained to carry it out?
(select one)

- Yes
- No
- Have no written emergency/disaster plan
- Don't know

19. Are copies of vital collection records (e.g., inventory, catalog, insurance policies) stored off site? (select one)

- Yes
- Some, but not all
- No
- Do not have copies
- Not applicable
- Don't know

20. Do you have adequate security systems (e.g., security guard, staff observation, intrusion detection) to help prevent theft or vandalism of the collection? (select one)

- Yes
- In some, but not all areas
- No
- Don't know

21. Which of the following most closely describes your current staffing for conservation/preservation?

(select all that apply)

- Paid conservation/preservation staff (full-time or part-time)
- Volunteers (full-time or part-time)
- Conservation/preservation duties assigned to various staff as needed
- Conservation/preservation services obtained through external provider
- No staff person has conservation/preservation responsibilities

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22. What does your conservation/preservation program include? (select all that apply)

	Done by institution staff	Done by external provider	Not done currently, but planned	Not done	Not applicable
Preventive conservation <i>(e.g. housekeeping, holdings maintenance rehousing, environmental monitoring)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation management <i>(e.g. administration, planning, assessment)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation treatment <i>(e.g. repair, mass deacidification, specimen preparation)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation reformatting <i>(e.g. preservation photocopying, microfilming)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation of audio-visual media and playback equipment <i>(e.g., preservation copies of media, maintaining equipment)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation of digital materials and electronic records collections <i>(e.g. migrating data to current software)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. Do your collections include digital content (computer based representation of text, numbers, images, and/or sound, e.g., optical discs, Web sites, electronic books)? (select one)

- Yes
- No
- Don't know
- Not applicable

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24. Please indicate your institution's level of need in the following areas related to conservation/preservation.

	No Need	Need	Urgent Need	Don't Know	Not Applicable
An emergency plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A prioritized long-range preservation plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planning surveys or assessments of collection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental controls <i>(e.g., heating, air conditioning, dehumidifying, humidifying)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improvements to reduce collections' exposure to light	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation treatment <i>(include specimen preparation)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation of digital collections <i>(digitized and born-digital)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation of audio/visual collections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integrated pest management <i>(approaches to prevent and solve pest problems in an efficient and ecologically sound manner)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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25. For all your collections that are currently in need of treatment, identify all the causes of the damage or loss of access to them.

	No damage or loss	Some damage or loss	Significant damage or loss	Don't Know
Handling <i>(e.g., by researchers, staff, in shipping)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water or moisture <i>(e.g., mold, stains, warping)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Light <i>(e.g. fading, discoloration)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Airborne particulates or pollutants <i>(e.g., dust, soot)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fire	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improper storage or enclosure <i>(e.g., bent, creased, adhered together)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vandalism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical or chemical deterioration <i>(due to temperature, humidity, aging, e.g., brittle paper, flaked paint, cracked leather, degradation of electronic media)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technological obsolescence of digital or audio/visual collections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prior improper treatment (s) or restoration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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26. Do you promote awareness of conservation/preservation activities using the following?

	Yes	No	Not done currently, but planned	Don't know	Not Applicable
Educating donors and/or trustees about preservation activities <i>(e.g. in tours, demonstrations)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Presenting preservation activities to members' or friends' groups <i>(e.g. in educational programming, printed/promotional materials)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Highlighting preservation activities in exhibitions or other programs for the public	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Serving as a source for conservation/preservation information to the public <i>(e.g. responding to queries)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using conservation/preservation as part of a strategy, for earned income <i>(e.g. selling archivally safe materials in shop, providing conservation on a fee-for-service basis)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Featuring preservation work on Web site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Expenditures and Funding

27. How many staff are currently employed in your institution? Include all staff, not just those for preservation. Do not express in full-time equivalents (FTEs). Indicate "0" if you have no staff in a category.

Full-time paid staff

Part-time paid staff

Full-time unpaid staff

Part-time unpaid staff

28. How many visitors or users did you serve last year? Indicate "0" if you had no visitors or users in a category.

On Site

Off Site

(e.g. traveling exhibitions, bookmobiles, classroom visits, educational programs)

Electronic

(e.g. visits to Web site, electronic distribution lists, electronic discussion groups)

29. What was your total annual operating budget for the most recently completed fiscal year?

- Less than \$10,000
- \$10,000 to 50,000
- \$50,001 to 100,000
- \$100,001 to 500,000
- \$500,001 to 1,000,000
- \$1,000,001 to 5,000,000
- \$5,000,001 to 10,000,000
- \$10,000,001 or more

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30. Do you have funds specifically allocated for conservation/preservation activities in your annual budget? (select one)

- Yes
- No
- Don't Know

If "Yes", how much?

31. Has your institution made an application, whether successful or unsuccessful, for conservation/preservation funding from any public or private source in the last 3 years? (select one)

- Yes
- No
- Don't know

32. If your institution did not make a grant application for conservation/preservation funding from any public or private source in the last 3 years, which of the following factors influenced the decision not to apply? (select all that apply)

- Lack of staff time or expertise to complete application
- Not aware of appropriate funding sources
- Additional project planning or preparation necessary before requesting grant funds
- Conservation/preservation not an institutional priority
- Currently have sufficient sources of funding
- Have applied for grant(s) from external sources in the past but have been unsuccessful
- Not applicable
- Don't know
- Other (please specify)

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Collections and Holdings

33. What do you believe is at high risk in your institution? (select yes for each one that applies)

	Yes	No
Books and Bound Volumes <i>(monographs, serials, newspapers, scrapbooks, albums, pamphlets)</i>	<input type="radio"/>	<input type="radio"/>
Unbound Sheets <i>(archival records, manuscripts, maps, oversized items, ephemera, broadsides, philatelic and numismatic artifacts, other paper artifacts)</i>	<input type="radio"/>	<input type="radio"/>
Photographic Collections <i>(microfilm, microfiche, photographic prints, negatives, slides, transparencies, daguerreotypes, ambrotypes, tintypes, glass plate negatives, lantern slides)</i>	<input type="radio"/>	<input type="radio"/>
Moving Image Collections <i>(motion picture film, video tape, laser disc, CD, DVD, minidisk)</i>	<input type="radio"/>	<input type="radio"/>
Recorded Sound Collections <i>(cylinder, phonodisc, cassette, open reel tape, DAT, CD, DVD, MP3)</i>	<input type="radio"/>	<input type="radio"/>
Digital Material Collections <i>(floppy discs, CD-R, DVD-R, data tape, online collections)</i>	<input type="radio"/>	<input type="radio"/>
Art Objects (paintings, prints, drawings, sculpture, decorative arts) <i>(e.g., fine metalwork, jewelry, timepieces, enamels, ivories, lacquer)</i>	<input type="radio"/>	<input type="radio"/>
Historic and Ethnographic Objects <i>(textiles (including flags, rugs, costumes and accessories), ceramics, glass (including stained glass), ethnographic artifacts (e.g., leather, skin, baskets, bark), metalwork (e.g., arms and armor, medals, coins), furniture, domestic artifacts (including frames, household tools/machines, dolls/toys, musical instruments), technological and agricultural artifacts, medical and scientific artifacts, transportation vehicles)</i>	<input type="radio"/>	<input type="radio"/>
Archaeological Collections	<input type="radio"/>	<input type="radio"/>
Natural Science Specimens <i>(zoological, botanical, geological, paleontological, paleobotany specimens)</i>	<input type="radio"/>	<input type="radio"/>

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Information for Statewide Preservation Planning

The following information will be helpful in applying for an implementation grant to assist cultural institutions in meeting their preservation needs.

34. What do you consider to be the three most pressing issues facing your organization's future ability to care for its collections?

35. What are the key strengths of your organization?

36. What resources does your organization need to adequately care for its collections?

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37. Would you support the formation of an organization known as the *Oklahoma Cultural Heritage Trust* that would invest in protecting, stabilizing, and preserving collections held by libraries, archives, and museums throughout the state?

- Yes
- No
- Maybe
- Don't Know

38. Would you be in favor of the legislature providing designated funds for this purpose?

- Yes
- No
- Maybe
- Don't Know

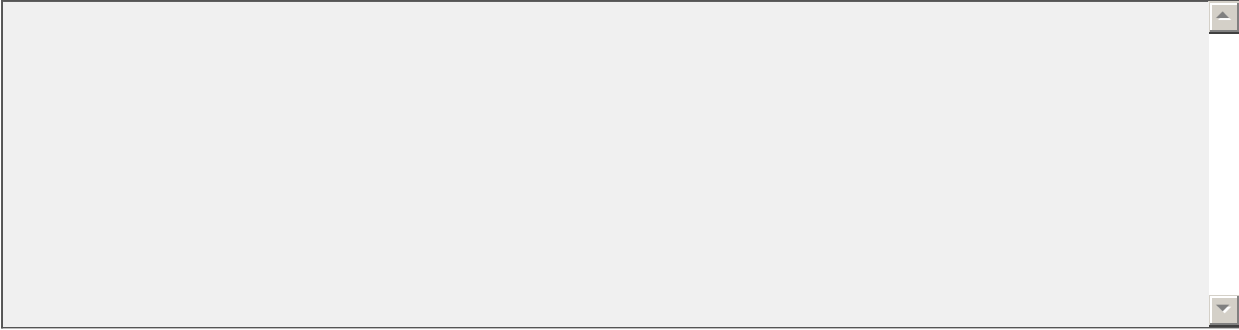
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39. Based on previous surveys and communications with Oklahoma’s library, archive, and museum community, several key concepts have been identified. Please indicate your opinion of how important these issues are to your organization.

	High Priority	Priority	Moderate Priority	Not a Priority
Hands-on training in preservation and conservation techniques.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
On-line training courses or some other form of self-directed study.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assistance with conducting a preservation survey.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accreditation for my Organization, once it demonstrates compliance with certain standards.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Certification for me, once I complete a defined course of study.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to a conservation lab that is staffed by a professional conservator for the care of items in my collection.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to a centralized digitization lab that has state of the art equipment to scan a variety of materials.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to a travelling “circuit rider” who can provide professional assistance in collection care.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A statewide campaign to increase public awareness of Oklahoma’s libraries, museums, and archives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Funding to upgrade facilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Funding to upgrade facilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Funding to provide better care of my collection.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional disaster networks that can help organizations whose collections are threatened, kind of like a Red Cross for cultural organizations, equipped with emergency supplies and materials.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public awareness campaign instructing individuals on the advantages of donating materials to museums, libraries, and archives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Work to pass legislation that prevents Oklahoma-based artifacts and documents from being gifted to out of state repositories by Oklahoma organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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40. In the space below, please list other issues that are important to you:



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Respondent Information

To be completed by lead person completing or coordinating the survey.

This information will be used only if we need to clarify a response. We shall keep this information, like all the information you provided in this survey, completely confidential.

Only aggregate data will be reported. Your individual responses will never be published or identified by us or any other organization cooperating in this project.

41. Name of the person completing or coordinating the answers to this survey:

42. Title

43. Responsibility for preservation activities:

44. Office Phone

45. Office Fax

46. Email Address

47. May we have permission to include the name of your institution in a published list of survey participants? Your survey responses will not be linked to your name; results will be reported only in aggregate.

Yes

No

This is the end of the survey. Thank you.