

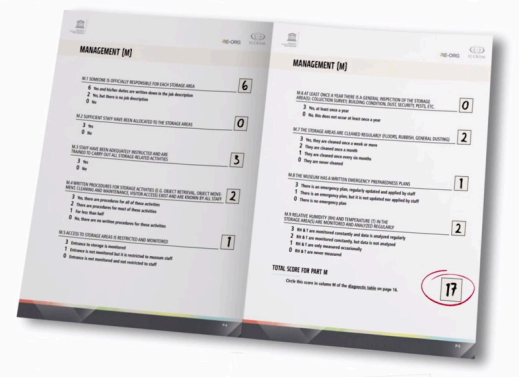
# SELF-EVALUATION TOOL FOR COLLECTIONS IN STORAGE

## PURPOSE OF THIS TOOL

This self-evaluation tool will help you decide whether your institution needs to embark on a RE-ORG project. The tool includes a series of statements (pp. 1-9) that you need to score and a Diagnostic Table (p. 10) to obtain an overview of the situation. There is also an ID Card (p. 11) that you can fill out to provide context for your evaluation. You can use the Diagnostic Table to share your results with colleagues and management. Show your progress by redoing the evaluation once you have completed a RE-ORG project!

## HOW TO USE IT

We suggest reading through all the pages before starting your evaluation. There are 4 sections: Management (M), Building & Space (S), Collection (C) and Furniture & Small Equipment (F). Each section includes 8-10 statements that describe optimal situations. For each statement, choose the option that is closest to your own reality. Add up the total score for each section and report it in the Diagnostic Table by circling the corresponding score. If you are familiar with the storage room, it should take you less than an hour. If you have more than one storage room, fill out one evaluation per room.



During this evaluation, you may identify major risks to your collections (flood, fire, etc.) which require serious attention. These are beyond the scope of RE-ORG and should be notified to management.

# MANAGEMENT (M)

M.1 SOMEONE IS OFFICIALLY RESPONSIBLE FOR THE STORAGE ROOM.

- 6** Yes and his/her duties are written down in his/her job description
- 2** Yes, but there is no job description
- 0** No, no one is responsible for the storage room

M.2 THERE IS SUFFICIENT STAFF TO SUPPORT STORAGE-RELATED DUTIES (PREPARING OBJECTS FOR STORAGE, ASSIGNING AND TRACKING OBJECT LOCATIONS, RETRIEVING AND HANDLING OBJECTS, CARRYING OUT GENERAL MAINTENANCE AND CLEANING, CONTROLLING ACCESS, PROTECTING COLLECTIONS IN-SITU OR EVACUATING THEM IN CASE OF EMERGENCIES, IMPLEMENTING INTEGRATED PEST MANAGEMENT).

- 3** Yes
- 0** No

M.3 THOSE WHO WORK IN STORAGE HAVE BEEN TRAINED TO CARRY OUT STORAGE-RELATED DUTIES.

- 6** Yes, they have been adequately trained for all these duties
- 2** They have been trained in some of these duties
- 0** No, there has been no training

M.4 WRITTEN PROCEDURES FOR STORAGE-RELATED DUTIES EXIST AND ARE KNOWN BY ALL STAFF.

- 6** Yes, there are procedures for all of these duties and they are known by all staff
- 4** There are procedures for most of these duties
- 2** There are procedures for less than half of these duties
- 0** No, there are no written procedures for any of these duties

M.5 ACCESS TO STORAGE IS CONTROLLED, BUT IT IS OPEN TO VARIOUS COLLECTION USERS (RESEARCHERS, STUDENTS, GENERAL PUBLIC).

- 3** Access to storage is controlled, but it is open to various collection users (researchers, students, general public)
- 2** Access to storage is controlled, but only staff are authorized to enter the storage room
- 1** Procedures exist for controlling access, but they are not always enforced
- 0** There are no procedures and access to storage is not controlled

# MANAGEMENT (M)

M.6 AT LEAST ONCE A YEAR, THERE IS A GENERAL INSPECTION OF THE STORAGE ROOM (COLLECTION, BUILDING, DUST, SECURITY AND PESTS).

- 3** Yes, there is a general inspection at least once a year
- 0** No, there is no general inspection at least once a year

M.7 THE STORAGE ROOM IS CLEANED REGULARLY (FLOORS, RUBBISH, GENERAL DUSTING).

- 3** Yes, storage rooms are cleaned regularly
- 1** Storage rooms are only cleaned when visitors are expected
- 0** There is no regular cleaning

M.8 THE INSTITUTION HAS ESTABLISHED A CLOSE WORKING RELATIONSHIP WITH THE LOCAL FIRE BRIGADE.

- 6** Yes, there is a close working relationship with local fire brigade
- 0** No such relationship has been established

M.9 ALL ACTIVITIES INVOLVING FIRE ARE BANNED FROM THE STORAGE ROOM AND ADJACENT ROOMS (SMOKING, HOT TOOLS, OPEN FLAMES, ETC.).

- 6** Yes, all such activities are banned
- 0** No, these activities are not banned

**TOTAL SCORE FOR MANAGEMENT (M)**

# BUILDING & SPACE (B)

B.1 THE BUILDING IS NOT LOCATED IN A FLOOD PLAIN.

- 6** The building is not located in a flood plain
- 4** The building is located in a flood plain, but the storage room is above ground level
- 2** The building is located in a flood plain and the storage room is below ground level
- 0** Flooding occurs regularly in the storage room

B.2 THE BUILDING PROVIDES RELIABLE PROTECTION AGAINST RAIN AND WEATHER EXTREMES.

- 6** Yes, the building protects the collection from all rain and weather extremes
- 4** The building has some flaws or maintenance issues, but the storage room is protected from weather extremes
- 2** The building has some flaws or maintenance issues, but periodically, weather extremes affect collections in the storage room
- 0** The building is in very poor condition and offers no protection from weather extremes

B.3 DOORS AND WINDOWS (IF ANY) OF THE STORAGE ROOM ARE SECURE (LOCKS AND/OR SECURITY BARS).

- 6** All doors and windows (if any) are secure
- 2** Some doors and/or some windows (if any) are secure
- 0** None of the doors or windows (if any) are secure

B.4 ALL OBJECTS NOT ON DISPLAY ARE HOUSED IN DESIGNATED STORAGE ROOMS. ALL STORAGE ROOMS ARE LOCATED IN THE SAME AREA OF THE BUILDING AND ARE WELL CONNECTED TO OTHER FUNCTIONAL AREAS (OFFICE, RESEARCH AREA, QUARANTINE ROOM, COLLECTIONS PREPARATION, ETC.).

- 6** All objects not on display are housed in designated storage rooms. All storage rooms are located in the same area of the building and are well connected to other functional areas.
- 4** All objects not on display are housed in designated storage rooms. Some storage rooms are scattered and are not well connected to other functional areas.
- 2** All objects not on display are housed in designated storage rooms. The storage rooms are scattered and are not well connected to other functional areas.
- 0** Some objects are stored in hallways, offices, or wherever space is available.

## BUILDING & SPACE (B)

B.5 THERE ARE DESIGNATED SPACES OUTSIDE THE STORAGE ROOM FOR SUPPORT FUNCTIONS (OFFICE, RESEARCH, QUARANTINE, DOCUMENTATION, COLLECTIONS PREPARATION, ETC.).

- 6** Yes, there are designated spaces for support functions outside storage
- 2** There are no designated spaces but when necessary, this can be arranged
- 0** No, these functions occur within the storage room

B.6 IT IS SAFE AND EASY TO MOVE OBJECTS FROM THE STORAGE ROOM TO OTHER AREAS OF THE BUILDING (DISPLAY, DOCUMENTATION, CONSERVATION, LOADING BAY, ETC.).

- 3** All routes between the storage room and other areas of the building are free from obstacles; they are suitable to move large objects and carts loaded with objects
- 2** Routes include corners and movement between floors, without obstacles
- 1** Routes include corners and movement between floors, with obstacles
- 0** Routes are obstructed and moving objects is difficult

B.7 THE WALLS, FLOORS AND CEILING OF THE STORAGE ROOM ARE IN GOOD CONDITION.

- 6** Yes, the walls, floors and ceiling are in good condition
- 4** There are visible signs of past deterioration (water stains, cracks, pests, etc.)
- 0** There are visible signs of current deterioration (damp walls and/or ceiling, condensation, pests) or defects (improper electric wiring, faulty plumbing, etc.)

B.8 THERE ARE NO WATER PIPES OR PLUMBING FIXTURES (VALVES, FAUCETS, TOILETS) OF ANY KIND WITHIN OR ABOVE THE STORAGE ROOM.

- 6** There are no pipes or plumbing fixtures of any kind in or above the storage room
- 2** There are water pipes or plumbing fixtures in or above the storage room, but not directly over the collection
- 0** There are water pipes or plumbing fixtures in or above the storage room and directly over the collection

B.9 THE STORAGE ROOM IS NOT USED TO HOUSE NON-COLLECTION ITEMS (PACKING MATERIALS, EXHIBITION PANELS, DISPLAY CASES, OFFICE FURNITURE, PUBLICATIONS, ETC.).

- 6** The storage room is reserved exclusively for the collection
- 2** Some non-collection items are kept in the storage room
- 0** A significant amount of space in storage is occupied by non-collection items

## BUILDING & SPACE (B)

B.10 STORAGE AISLES ARE WIDE ENOUGH TO MOVE OBJECTS SAFELY.

- 3 Yes, all aisles are wide enough to move objects safely
- 2 Most aisles are wide enough to move objects safely
- 1 It is difficult to move objects safely in the aisles
- 0 It is impossible to move objects safely in the aisles

TOTAL SCORE FOR BUILDING & SPACE (B)

# COLLECTION (C)

C.1 ALL OBJECTS ARE ACCESSIONED AND THEIR ACCESSION NUMBERS ARE RECORDED IN THE DOCUMENTATION SYSTEM.

- 6** Yes, this is the case for all objects
- 4** Yes, for 80% of the objects
- 2** For less than 50% of the objects
- 0** None of the objects are accessioned

C.2 ALL OBJECTS ARE MARKED WITH A UNIQUE ACCESSION NUMBER.

- 6** Yes, this is the case for all objects
- 4** Yes, for 80% of the objects
- 2** For less than 50% of the objects
- 0** For none of the objects

C.3 THE DOCUMENTATION FOR EACH OBJECT INCLUDES ITS DIMENSIONS AND WEIGHT.

- 3** Yes, this is the case for all objects
- 2** Yes, for 80% of the objects
- 1** For less than 50% of the objects
- 0** For none of the objects

C.4 EACH STORAGE ROOM, STORAGE UNIT AND STORAGE SURFACE (SHELF, DRAWER, RACK) IS IDENTIFIED WITH A NUMBER OR LETTER (OR BOTH) AND IS LABELLED VISIBLY.

- 6** Yes, this is the case for all storage rooms, units and surfaces
- 4** Yes, for 80% of storage rooms, units and surfaces
- 2** For less than 50% of storage rooms, units and surfaces
- 0** There is no location system

C.5 EACH OBJECT HAS A LOCATION CODE THAT LINKS IT TO A SPECIFIC LOCATION WITHIN EACH STORAGE UNIT; THIS CODE IS RECORDED IN THE DOCUMENTATION SYSTEM.

- 6** Yes, all objects have a location code that is recorded in the documentation system
- 4** Yes, for 80% of the objects
- 2** For less than 50% of the objects
- 0** There is no location system, or none of the location codes are recorded in the documentation system

# COLLECTION (C)

C.6 OBJECTS CAN BE RETRIEVED WITH LIMITED HANDLING OF OTHER OBJECTS.

- 6** A maximum of 2 objects must be handled to retrieve the one desired
- 4** In some cases, more than 2 objects must be handled
- 2** In any given shelf, drawer or rack, most of the objects must be handled in some way to reach the one desired
- 0** Objects in storage are completely inaccessible

C.7 IT TAKES A MAXIMUM OF 3 MINUTES TO LOCATE AN OBJECT IN STORAGE, STARTING WITH ITS RECORD IN THE DOCUMENTATION SYSTEM.

- 6** All objects can be located within 3 minutes
- 4** 3 to 10 minutes are required to locate most objects
- 2** More than 10 minutes are required to locate most objects
- 0** Most objects cannot be located using the current documentation system

C.8 TEMPORARY CHANGES IN OBJECT LOCATIONS ARE TRACKED (FROM STORAGE TO: DISPLAY, OFFICES, RESEARCH AREA, LAB, OTHER INSTITUTIONS).

- 3** Yes, all changes in object locations are tracked
- 0** No changes in object locations are tracked

C.9 OBJECTS ARE FREE FROM PESTS AND MOULD.

- 6** The entire collection is free from active pest infestations or mould
- 3** Some objects are actively infested by pests or mould
- 0** Most objects are actively infested by pests or mould

C.10 OBJECTS AND STORAGE UNITS ARE DUST FREE.

- 3** Yes, objects and storage units are dust free
- 2** Most objects and storage units are dust free
- 1** Some objects and storage units are dust free
- 0** No, everything is covered in dust

**TOTAL SCORE FOR COLLECTION (C)**



# FURNITURE & SMALL EQUIPMENT (F)

F.1 NO OBJECT IS PLACED DIRECTLY ON THE FLOOR.

- 6** There are no objects directly on the floor
- 4** A few objects are placed directly on the floor
- 2** Most of the objects are placed directly on the floor
- 0** All the objects are on the floor

F.2 THERE IS SUFFICIENT SPACE IN EXISTING STORAGE UNITS TO ACCOMMODATE NEW ACQUISITIONS.

- 3** For the next 10 years
- 2** For the next 2 years
- 1** Storage units are already full
- 0** Storage units are overcrowded

F.3 STORAGE UNITS ARE SUITABLE FOR THE TYPES AND DIMENSIONS OF OBJECTS.

- 3** Yes, for all the storage units
- 2** For most of the storage units
- 0** In many cases, storage units are not suitable for the objects

F.4 STORAGE FURNITURE HAS EITHER BEEN TREATED FOR PEST RESISTANCE OR IS MADE WITH PEST-RESISTANT MATERIALS.

- 3** Yes, all storage units are pest proof
- 1** Most storage units are pest proof
- 0** No, most of the storage units are vulnerable to pests

F.5 SPECIFIC CARTS, TRAYS AND LADDERS ARE ASSIGNED TO THE STORAGE ROOM.

- 3** Yes, such equipment is always present in the storage room, and is specifically assigned to it
- 1** Some equipment exists in the building, but none has been specifically assigned to the storage room
- 0** No, there is no such equipment

# FURNITURE & SMALL EQUIPMENT (F)

F.6 THERE ARE SMOKE DETECTORS CONNECTED TO AN ALARM SYSTEM IN THE STORAGE ROOM AND IN ADJACENT ROOMS; THEY ARE IN WORKING ORDER.

- 6** There are smoke detectors connected to an alarm system in the storage room and in adjacent rooms and they are in working order
- 1** Smoke detectors are installed in the storage and adjacent rooms, but they are not regularly checked
- 0** There are no smoke detectors

F.7 PORTABLE FIRE EXTINGUISHERS ARE LOCATED THROUGHOUT THE BUILDING, INCLUDING THE STORAGE ROOM; THEY ARE REGULARLY INSPECTED AND SOME STAFF ARE TRAINED TO OPERATE THEM.

- 6** There are portable fire extinguishers, they are checked regularly, and some staff are trained to operate them
- 1** There are portable fire extinguishers, but they are not checked regularly and/or staff are not trained to operate them
- 0** There are no portable fire extinguishers

F.8 "SPECIAL OBJECTS" (VERY SMALL, VERY FRAGILE, FLEXIBLE, ETC.) HAVE APPROPRIATE BOXES, PADDING, MOUNTS OR OTHER PACKAGING.

- 3** Yes, all "special objects" are adequately protected
- 2** Most "special objects" are adequately protected
- 1** Some "special objects" are adequately protected
- 0** No boxes, padding, mounts or other packaging materials are used to protect "special objects"

**TOTAL SCORE FOR FURNITURE & SMALL EQUIPMENT (F)**

**Congratulations! Now, report the total scores for M, B, C and F in the Diagnostic Table.**



INSTITUTION NAME: \_\_\_\_\_

ASSESSOR'S NAME: \_\_\_\_\_

STORAGE ROOM: \_\_\_\_\_

DATE OF ASSESSMENT: \_\_\_\_/\_\_\_\_/\_\_\_\_

	MANAGEMENT (M)	BUILDING & SPACE (B)	COLLECTION (C)	FURNITURE & SMALL EQUIPMENT (F)
<b>ALL OK! YOU CAN PROCEED WITH OTHER COLLECTIONS CARE PRIORITIES</b>	42	54	51	33
	41	53	50	32
	40	52	49	31
	39		48	30
	38			29
				28
<b>ONLY SMALL IMPROVEMENTS ARE NEEDED</b>	37	51	47	27
	36	50	46	26
	35	49	45	25
	34	48	44	24
	33	47	43	23
	32	46	42	22
	31	45	41	21
	30	44	40	20
	29	43	39	19
	42	38	18	
<b>YOU NEED A RE-ORG PROJECT</b>	28	41	37	19
	27	39-40	35-36	18
	26	37-38	33-34	17
	25	35-36	31-32	16
	24	33-34	29-30	15
	23	31-32	27-28	14
	22	29-30	25-26	13
	21	27-28	23-24	12
	20	25-26	21-22	11
	19	23-24	19-20	10
	18	21-22	17-18	9
	17	19-20	15-16	
	16	17-18	13-14	
	15	15-16	11-12	
	14	13-14		
13	11-12			
12				
11				
10				
<b>YOU NEED TO START A RE-ORG PROJECT NOW!</b>	9	10	10	8
	8	9	9	7
	7	8	8	6
	6	7	7	5
	5	6	6	4
	4	5	5	3
	3	4	4	2
	2	3	3	1
	1	2	2	0
	0	1	1	
	0	0		

# ID CARD

## GENERAL INFORMATION

INSTITUTION NAME: \_\_\_\_\_

YEAR WHEN INSTITUTION WAS CREATED: \_\_\_\_\_

CURRENT NUMBER OF STAFF: \_\_\_\_\_

CURRENT NUMBER OF VOLUNTEERS: \_\_\_\_\_

AVERAGE NUMBER OF VISITORS PER YEAR: \_\_\_\_\_

NUMBER OF TEMPORARY EXHIBITIONS ORGANIZED THIS YEAR: \_\_\_\_\_

TOTAL NUMBER OF OBJECTS IN THE COLLECTION: \_\_\_\_\_

NUMBER OF OBJECTS ACQUIRED IN LAST 5 YEARS: \_\_\_\_\_

NUMBER OF OBJECTS ON DISPLAY: \_\_\_\_\_

NUMBER OF OBJECTS LOANED IN LAST 5 YEARS: \_\_\_\_\_

## STORAGE ROOMS

NUMBER OF PEOPLE RESPONSIBLE FOR STORAGE: \_\_\_\_\_

TOTAL NUMBER OF COLLECTION STORAGE ROOMS: \_\_\_\_\_

TOTAL SURFACE OF THE STORAGE ROOMS (LENGTH X WIDTH): \_\_\_\_\_

WE HAVE (check all that apply):

- office
- research area
- quarantine room and equipment
- collections preparation room