ADMINISTRATION

Governance Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your organization have a written constitution and bylaws, or some other organizational document such as an ordinance, mandate, or charter?				
Is there a written dissolution agreement that specifies where your collections will go if the organization no longer exists?				
Does your repository have a written statement that authorizes its establishment and continued existence, e.g., articles of incorporation?				
Has this statement been reviewed in the past five years?				
In the case of a parent organization, does your statement of authority clearly outline the repository's placement in the organizational structure?				
Does your statement of authority clearly indicate the position(s) with authority to make commitments on behalf of the repository?				
Does your board of directors understand its purpose and responsibilities?				
Does your institution operate in compliance with applicable municipal, state, and federal laws and regulations?				

ADMINISTRATION

Strategic Planning Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the archives/historical society/museum have a written mission statement?				
Is the mission statement approved and periodically reviewed (at least every five years) by the board/governing body?				
Have changes occurred which suggest that your current mission statement needs to be revised?				
Does the mission statement clearly reflect the institution's current functions and collecting focus?				
Does the mission statement realistically reflect the physical and financial capacity of the institution?				

ADMINISTRATION

Application for Non-Profit Status Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the institution have non-profit status?				
Has the institution contacted the IRS for more information and filing forms?				
Has the archives/historical society/museum prepared a purpose statement and bylaws?				
Has the institution paid the application fee and responded to IRS requirements?				
If the institution received a determination letter in favor of non-profit status, are all documents pertaining to this designation kept in a safe place?				

COLLECTIONS MANAGEMENT

Acquisitions/Collection Development Policy Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the institution have a written acquisition/collection development policy?				
Has the policy been reviewed in the last 5 years?				
Is the policy consistent with the mission and strategic plan of the repository?				
Is the policy realistic in terms of the repository's capacity to care for the materials it acquires? Does the institution acquire only those collections that it can properly document, preserve, store, maintain, and provide public access to?				
Does the institution have a designated individual or an acquisitions committee with final decision in all acquisitions?				
Are donations accepted only without conditions or with reasonable restrictions that the institution is able to honor?				
Does the policy contain statements regarding:				
its purpose?				
the types of activities supported by the collection (research, exhibits, outreach, publications, etc.)?				

Continued on next page

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the policy contains statements regarding *(cont.)*:				
The clientele served by the collection (scholars, students, genealogists, etc.)?				
The priorities of the collection (i.e. strengths and weaknesses, geographic and subject areas collected)?				
The limitations of the collection (what you do not collect)?				
Cooperative agreements with other archival repositories or other museums regarding collecting?				
Does the institution make exceptions to its acquisitions/collection development policy only after careful thought?				
Does the institution accept only reasonable restrictions on materials, and understand the consequences of accepting restrictions?				

COLLECTIONS MANAGEMENT

Deed of Gift Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the institution have a signed gift agreement form or other proof of legal title, a transfer of title form, or bill of sale to all collections?				
Has this form been reviewed within the past five years?				
Has this form been reviewed by legal counsel?				
Is the repository aware of copyright laws and the restrictions that may apply?				
Does the form contain:				
Donor's name, address, and signature?				
Repository's name, address, and representatives' signature?				
Date of the transfer of title?				
Description of the material transferred by the deed?				
Designation of copyright ownership?				
Any restrictions regarding use and names of those who can impose/lift such restrictions?				
Names of those authorized to dispose of unwanted materials and how they should be disposed of?				
Does the repository understand how to deal with materials donated in the past without a Deed of Gift?				

COLLECTIONS MANAGEMENT

Collections Assessment Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the repository have a written set of assessment guidelines?				
Are your assessment guidelines based on generally-accepted guidelines?				
Are your assessment guidelines consistent with your acquisition/collection development policy?				
Does your repository have a staff person with experience in collection assessment?				
Does your repository ever use outside consultants to evaluate questionable materials?				
When materials are assessed as not appropriate for your repository, do you refer the materials to other repositories that may collect in that area?				

COLLECTIONS MANAGEMENT

Accessioning/Registration Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the repository have written accession procedures for donations?				
Have registration and record-keeping duties, or the coordination of those duties, been assigned to a specific individual?				
Does the repository maintain an accession register or log?				
Does the repository use accession forms?				
Are records kept for all incoming material on loan?				
Is there some means of recording the exit of collections from the building?				
Is the accession register kept in a permanent medium (e.g., written in permanent ink, typed or computer-generated using carbon-based toner, kept on acid-free paper)?				
Is a back-up copy of the accession register kept off-site?				
Is a unique number assigned to all archival collections or museum objects and attached in a clear, safe and unobtrusive manner?				
Are the methods used to apply numbers to artifacts appropriate to the specific material to which the number is being applied, and are they consistent with accepted conservation practice?				

Continued on next page

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Has a system for recording information—including the type of information to be recorded and the manner in which it is recorded—been adopted?				
Are the accession forms adequate to record the following:				
Accession number?				
Date received?				
Statement of provenance (source)?				
Description of material?				
Date range of material?				
Quantity/size of collection?				
Location within repository?				
Notation of any restrictions?				
Status of accession?				
Donor/depositor information?				
Copyright owner (if appropriate)?				
Relationship to previously accessioned materials?				
Condition?				
Has a donor/collection file been established for each donation?				

COLLECTIONS MANAGEMENT

De-Accessioning Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Are all instances of de-accessioning recorded?				
Does the institution's governing body or a sub-committee of the governing body make all final decisions regarding de-accessions?				
Are all de-accessioned collections or objects first offered to the donor or as an exchange, gift, or private sale to other public archival repositories/historical societies/museums before disposition by other means?				
Are all funds received through de-accessioning activities used for the direct benefit of the collections, either through acquisitions or improvements in collections care?				

FACILITIES

Storage Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Are archival-quality, acid-free and chemically neutral, containers, padding, and packing material used?				
Are aisles wide enough to allow movement of objects or boxes and moving equipment or ladders?				
Are bottlenecks and sharp corners eliminated?				
Are objects and archival boxes removed from designated aisle areas?				
Is the storage area large enough for shelving and cabinets, and still able to provide easy access to the collections?				
Has the storage floor been inspected assuring it will accommodate the weight of cabinets, shelving, and collections?				
Are all materials stored at least four inches off the ground?				
Are all storage cabinets and shelving chemically and physically safe for the collections?				
Are objects stored in their natural position or in the position that is most stable and provides the least stress to the object?				
Are objects supported to prevent accidental movement or shifting and to prevent sagging or distortion over time?				
Is the storage area used for collections storage only?				
Is the storage location of each archival collection or museum object noted on registration records?				

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Is a plan posted showing the layout of the storage area?				
Is the storage location of each archival collection or museum object noted on registration records?				
Are all shelves and cabinets clearly numbered and labeled?				
Are all boxes and other containers labeled on the outside with light- and water-resistant ink or carbon-based computer printer toner?				
Is strict control of access to storage areas maintained?				
Is storage off limits to through traffic?				
Are all unnecessary doors eliminated in storage areas?				
Are stored collections accessible without risk to staff or to the collections?				
Are stable ladders available as required?				
Are electromagnetic disks or tapes (e.g., oral history audio tapes) protected from proximity to steel or other potential sources of magnetic interference?				
Are collections stored away from windows, pipes, heating elements or vents?				

FACILITIES

Environmental Requirements Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the repository maintain a consistent overall temperature of 68ºF (+/- 2ºF)* in collection storage areas?				
Does the repository maintain a consistent overall relative humidity of 40% (+/- 5%) in collection storage areas?				
Are these conditions monitored on a regularly scheduled basis, preferably weekly?				
Are monitoring devices (hygrothermographs or data loggers) periodically calibrated and verified?				
Is there a regular cleaning schedule for the storage and other areas? Do you use a vacuum with a HEPA filter to clean?				
Do storage areas have good air circulation?				
Are storage areas protected from daylight and other sources of ultraviolet light?				
Are lights turned off in storage areas unless needed by staff?				
Do all fluorescent lights have ultraviolet shields on them?				
Have you sealed all openings and cracks in your building? Do you keep outside doors and windows closed?				
Are collections stored away from overhead pipes and air conditioning units?				
Are collections stored at least four inches off the floor?				
In repositories that close during the winter months, do you follow a winterizing routine?				

*Appropriate temperature and humidity levels can vary with the types of materials. Consistency is an important consideration so that cycling is avoided. These temperature and humidity levels are good for most materials, are generally maintainable, and provide reasonable comfort for people working with materials. They are not necessarily "ideal" environmental settings for all materials.

FACILITIES

Security Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the institution have a written security policy and procedures?				
Has the institution assigned an individual responsibility for overseeing security?				
Is there a written policy on who is authorized to have keys to the building and to specific building areas?				
Is someone responsible to maintain a key log?				
Does the institution have a written policy prohibiting smoking and food consumption in areas containing collections?				
Does the institution maintain controlled access to confidential information about the collections?				
Is access to storage areas limited?				
Are locks, doors, and windows secure with appropriate locks, deadbolts, or other security features?				
Does the institution have a security system?				
Is the security system monitored by a security firm/central office 24 hours a day?				
Does the institution control the entry of parcels, large bags, umbrellas, etc., into the building(s)?				
Are notices posted for the public regarding touching of collection objects?				
Are all public areas supervised during open hours?				
Is there some system for monitoring photography done on the premises?				
Do you know your staff, board members, and volunteers?				

CONSERVATION/PRESERVATION

Conservation Policy and Preservation Planning Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the institution have a written conservation policy?				
Is there a written, board-approved collections care and handling policy?				
Are staff and volunteers trained in basic care and handling?				
Is there a manual of care and handling procedures?				
Has the institution established a policy for when it will consult with an outside conservator? Does it know how to find a qualified conservator?				

CONSERVATION/PRESERVATION

Care and Handling of Collections Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Is each collection/object given the same standard of care as any other?				
Are smoking, drinking, and food consumption restricted to designated areas?				
Are collections/objects handled as little as possible?				
Do staff members wash their hands before they handle any object?				
Are objects and photographs handled with gloves, either clean cotton or latex, whichever is appropriate?				
Are books/volumes pulled from shelves properly, avoiding damage to the spine?				
Is the unnecessary movement of objects avoided?				
When objects are moved, are they moved using a secondary support, such as a trolley or tray, with packing and support to prevent damage?				
Are objects properly supported when handled?				
Is care taken when moving objects with appendages or projecting parts?				
Are objects transported off-premises packed in non-abrasive materials to protect them against damage from movement, vibration, and climatic fluctuations?				

RESEARCH

Access Policy Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the repository have a written policy on collection access?				
Does the policy state who may use the facility?				
Does the policy describe how collection information is made available to researchers?				
Does the repository apply restrictions with caution?				
Have the records on restrictions to collections been well maintained?				
Are restrictions on access to collections reviewed on a regular basis to determine if they are still necessary?				
Does the staff consistently and equitably enforce restrictions on collection access?				

RESEARCH

Reference Service Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the repository have the resources and space to accommodate visiting researchers?				
Does the repository have the resources to serve off-site researchers who cannot visit in person?				
Does the repository have regularly scheduled reference hours?				
Are the reference hours posted where researchers can find them easily?				
Are researchers made aware of any fees associated with using the collections or duplicating materials?				
Is a trained staff member available for regular consultation during reference hours?				
Do you ask researchers to register and/or complete a research application?				
Does your repository maintain forms that track what materials are used by researchers, and keep them confidential?				
Does your repository have written procedures regarding the handling of materials?				
Are researchers made aware of procedures for requesting and using collections?				
Is research conducted according to the standards of scholarship of the research discipline in which the research is done?				

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Do researchers adhere to any legal and/or ethical restrictions on research?				
For service and security purposes, is a staff member always present when collections are being used?				
Does the repository answer written requests for information?				
Does the repository answer telephone requests for information?				
Does the repository answer e-mail requests for information?				
Does the repository keep statistics on reference use?				
Are users able to have materials copied?				
Are they allowed to copy materials themselves?				
Do you have methods of reproducing paper materials, photographs, audio, and moving images, either in-house or out-of-house?				
Doe you have forms for reproduction requests? Do those forms have the necessary elements?				
Does your repository reserve the right to refuse to copy material when there are risks to the material?				
Do you have a policy on publication of materials from your collections?				
Do you have a fee schedule for publication?				
Is the federal copyright law posted and strictly observed?				

OUTREACH/PUBLIC PROGRAMMING/PUBLIC RELATIONS

Outreach Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Has the repository designated responsibility for public relations and marketing to an individual or committee?				
Does the institution have a public relations and marketing policy?				
Does the institution produce promotional materials?				
Has the institution's public relations and marketing representative established liaison with local media representatives to promote the institution?				
Does the institution's public relations and marketing representative send out press releases regularly?				
Is your repository open to the public on a regular schedule?				
Has the institution posted a notice of regular open hours?				
Has the institution posted precise directions to its location in prominent and diverse places?				
Does the institution employ external and internal signage to orient and direct visitors?				
Does your repository publish a newsletter?				
Does your repository publish brochures?				
Does your repository publish guides to or catalogs of the collections?				
Is your repository's catalog available through an on-line public access catalog or bibliographic network?				
Does your repository have a well-designed, accessible, and informative website?				

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Is the website updated regularly?				
Is the website accessible to the disabled and to people using a variety of Internet connections, computers, and browsers?				
Does your repository target key groups of researchers?				
Does your staff contact potential donors of materials?				
Do outreach efforts target a variety of constituents (age, income, ethnicity)?				
How often does the museum provide alternate learning opportunities beyond the museum and in the community it serves?				
Does the institution maintain records documenting its public relations and marketing efforts?				
Does the institution consider opportunities that give cultural groups a means to share their own history within the museum context?				
Does the institution periodically review and evaluate its public relations and marketing efforts?				

EXHIBITIONS

Developing and Interpreting Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the museum have an exhibition policy to determine the kinds of exhibits it will develop?				
Do the exhibits complement the institutional mission and strategic plan?				
Have you identified your audience? What are they interested in? Why are they visiting your museum?				
Does the exhibit policy outline the means and budgets necessary for an exhibition program? Does it identify staff or volunteers responsible for developing the exhibit and related programs?				
What are the objectives of the exhibition? What story does it tell? Does it fit into a larger historical context? Are you considering a variety of interpretive approaches?				
How much and what kind of text will narrate the exhibit? Are illustrations and photographs included? Will there be interactive aspects incorporated into the exhibit? Would the addition of an audio-visual component help tell the story?				
Are there opportunities to provide meaningful educational programs or publications that would expand the visitor's experience of the exhibit theme?				

STAFFING AND PROFESSIONAL DEVELOPMENT

Volunteers Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the institution have written task-oriented job descriptions for volunteers?				
Has provision been made for professional development of volunteers?				
Has a specific individual been assigned the responsibility of overseeing volunteer management?				
Is a record kept of volunteer hours?				
Do you have a way to recognize volunteers and their work?				

ADMINISTRATION

Insurance Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the archives/historical society/museum have insurance coverage?				
Has the institution assigned an individual responsibility for monitoring the institution's insurance options, and for making recommendations to the board?				
Does the institution have insurance coverage for its building(s), equipment, and furnishings?				
Does the institution have insurance coverage for its collections?				
Does the institution have public liability insurance or an equivalent provision?				
Has the institution investigated:				
what hazards might be expected causes of loss?				
the possibilities for loss or damage?				
at what frequency might they occur?				
what is the likely severity?				
what monies are available to finance and/or protect the objects?				

ADMINISTRATION

Grant Programs and Grant Writing Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Is someone on your repository's staff trained in grant writing?				
Do any grant proposals you create match closely with the institution's mission and strategic plan?				
Do you follow the basic tips for effective grant writing?				

COLLECTIONS MANAGEMENT

Arrangement of Archival Collections Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository have a written procedure for arranging materials?				
Does your repository take into consideration the principles of provenance and original order when arranging its materials?				
When transferring materials to the repository, do you try to maintain their original order?				
When processing, if the original order has been lost, do you record your reasons for the new arrangement?				
If non-textual or oversize records must be removed from the collection, do you keep them intellectually connected and make note of where they can be found?				

COLLECTIONS MANAGEMENT

Archival Collection Description/Cataloging Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository create collection descriptions to aid researchers?				
Are the elements in your descriptions consistent with the description elements found in the MARC format?				
Do your finding aids contain at least the following information:				
Repository Name?				
Collection Number?				
Creator?				
Title statement?				
Date span?				
Physical description/volume?				
Historical or biographical note?				
Content description?				
Restrictions?				
Subjects?				
Container list?				
Does your repository post information about its collections on its website?				
Does your repository submit your collection descriptions to National Union Catalog of Manuscript Collections (NUCMC)?				
Does your repository put your collection descriptions on OCLC?				

COLLECTIONS MANAGEMENT

Archival Item-Level Description/Cataloging Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository create item-level descriptions to aid researchers?				
Do your descriptions follow a consistent format for describing collections?				
Are the elements in your descriptions consistent with the description elements found in the MARC or Dublin Core formats?				
Do you use the Library of Congress' *Graphic Materials: Rules for Describing Original Items and Historical Collections*? (This publication is for the description of photographs and other visual materials.)				
Do your descriptions contain the following information:				
Number?				
Creator?				
Title?				
Publication information?				
Date?				
Physical description/volume?				
Historical or biographical note?				
Terms of use/restrictions?				
Provenance?				
Subjects?				
Do the descriptions use the standard thesauri for names, subjects, genre terms, and geographic terms?				
Have any of your descriptions been entered into an automated collection management system?				
Does your repository post information about its collections on a website?				

COLLECTIONS MANAGEMENT

Museum Description/Cataloging Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository create object descriptions to aid researchers?				
Do your descriptions follow a consistent format for describing objects?				
Are all items cataloged as fully as possible according to the outlined procedures?				
Does the cataloging system provide for ready retrieval of information?				
Are the museum's curatorial staff and volunteers trained in the retrieval of catalog data?				
Does the museum keep secure, and maintain controlled access to, catalog records that include insurance valuations or other confidential information?				
Has provision been made for updating records should additional information become available?				
Is the museum's record-keeping system linked by cross-references made in catalog records to other records such as donor files, artists' resume files, and photograph files?				
Is an object classification system used in registration and record-keeping?				

Continued on next page

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Do your descriptions contain the following information:				
catalog number?				
item classification?				
item name or title?				
material(s) of which the object is composed?				
date of manufacture?				
place of manufacture?				
name of maker?				
dimensions?				
narrative description?				
condition?				
provenance information?				
markings, labels, inscriptions, etc.?				
miscellaneous notes?				
date received into museum collection?				
how acquired?				

COLLECTIONS MANAGEMENT

Automation Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Do you need to automate? Is your collection, staff, and audience large and complex enough to justify it?				
Do you have good information on your collections to put into an automation system, or will it need revision?				
Would automation provide more benefits than burdens to your institution?				
Are you using accepted standards and procedures to describe and manage your collections?				
Do you review available products carefully before purchasing and implementing them?				

COLLECTIONS MANAGEMENT

Loan Agreement Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository accept loans?				
Does your repository loan?				
Does the repository currently use a loan agreement form?				
Has this form been reviewed within the past 5 years?				
Has this form been reviewed by legal counsel?				
Does the form contain:				
loaner's name, address, and signature?				
repository's name, address, and representatives' signature?				
date of the loan and time span for loan?				
description of the material loaned?				
description of any restrictions regarding use?				
description of repository's responsibility for processing?				
statement regarding the repository's responsibility in case of loss or damage?				
name(s) of depositor's representative(s) with authority to make decisions regarding its disposition?				

FACILITIES

Pest Control Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Is there a regular schedule for pest inspection and control?				
Is all incoming material isolated in a separate room and checked for infestation?				
If infestation is found, is it dealt with immediately?				
Is regular, thorough housekeeping of the storage areas undertaken?				
Is food consumption prohibited in storage areas?				
Are staff and volunteers trained in the recognition of signs of infestation on the premises and in the collections?				
Are all past or present indications of infestation recorded?				
Is any treatment undertaken recorded in condition reports?				
Are the staff informed of, and precautions taken, when dealing with toxic pest control substances?				

FACILITIES

Safety Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does the institution comply with the local and state fire codes?				
Are all storage areas equipped with smoke and/or heat detectors?				
Does the institution have a fire alarm system?				
Does a security firm/central office on a 24-hour basis monitor the fire alarm system?				
Is there a fire suppression system?				
Does the institution have exit lights above all exits?				
Are emergency exit procedures posted at the entrance?				
Is regular maintenance and repair undertaken?				
Does the institution comply with any regulations governing designated historical properties?				
Does the institution comply with ADA regulations?				
Does the institution comply with OSHA regulations?				
Does the institution have a first aid box and at least one staff member with first aid training?				
Are the staff informed of, and precautions taken, when dealing with toxic pest control substances?				

RESEARCH

Copyright Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository post the copyright warning at any public copier, anyplace where copies are ordered, and on all copy forms for photocopies, photograph reproductions, or copies of audio or moving image materials?				
Does your repository make the user responsible for any copyright infringement on all forms where researchers order photocopies, photograph reproductions, or copies of audio or moving image materials?				
Does your repository keep good records on who holds copyright to the materials you hold?				
Does your Deed of Gift form include a provision for donors to choose whether to transfer copyright to your repository—now, later, or never?				
Does your repository take copyright in consideration when planning any copying for preservation and access, including microfilming and digitization?				
Does someone on staff regularly seek out information and training on changes in copyright laws?				
Has your repository identified a qualified person (i.e. attorney, professionally-trained archivist) to consult with copyright questions?				

RESEARCH

Duplication, Reformatting, and Digitization
of Archival Materials

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository currently photocopy materials for preservation purposes?				
Is photocopying done on acid-free paper?				
Has your repository staff compiled a list of materials that are candidates for duplication?				
Does your repository own a microfilm reader?				
Does your repository own a microfilm reader-printer?				
Has your repository had any of its materials microfilmed				
Did your vendor adhere to national standards for preservation microfilming?				
Has your repository invested in duplicate (security) copies of microfilm to be stored at an off-site location in case of disaster?				
Does your repository have the staff and computing capacity to digitize materials?				
Do you adhere to national standards when you digitize?				
Does your repository have the equipment needed to provide access to digitized materials?				
Do you have a long-term plan for maintenance of materials you have digitized?				

CONSERVATION/PRESERVATION

Disaster Preparedness Plan Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository have a written disaster plan?				
Is your plan up-to-date and reviewed on a regular basis?				
Are staff members required to read and be familiar with the disaster plan?				
Have all staff members been trained in emergency procedures such as the use of fire extinguishers, first aid, etc.?				
Are copies of your plan maintained off-site and readily available in case of emergencies?				
Are your volunteers and governing board members familiar with your plan?				
Are your local police and fire departments aware of your particular needs in case of emergency?				
Does your plan include a list of what to save first?				
Are emergency supplies available in-house as identified in your plan?				

OUTREACH/PUBLIC PROGRAMMING/PUBLIC RELATIONS

Public Programming Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository offer any public programs such as workshops, lectures, etc.?				
Does the repository have a written public programming policy?				
Do the public programs the museum presents meet the mission and goals of the institution?				
Has the institution defined its audience or audiences?				
Is the institution's public programming relevant to its collections and audience?				
Do you have exhibits focusing on your museum collections?				
Do you have exhibits focusing on your archival collections?				
Does the museum provide information about its collections, exhibitions, and sites beyond that presented in exhibit text, e.g., through catalogs, self-guided tours, guided tours, etc.?				
Is training provided for public programming staff (volunteer interpreters, docents, guides, etc.)?				
Is the training sufficient to ensure that staff presents the correct information well, or that they have the ability to readily locate the correct information?				

Continued on next page

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
How are the programs balanced in theme, type, and target audience to mesh with the goals of the museum?				
What input do the publics being served have with program development?				
Who is responsible for developing education program ideas?				
How are they delivered to the public?				
How are they evaluated?				

EXHIBITIONS

Producing and Evaluating Exhibits Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
What exhibit methods are best used to tell your particular story?				
What materials and supplies are needed to produce the exhibits?				
What design elements are needed to provide accessibility, i.e. to the vision impaired, small children, visitors in wheelchairs, etc.?				
Is the exhibit visually interesting?				
Does the design match the theme and content of the exhibit?				
Do you have adequate lighting and environmental conditions in the exhibit gallery?				
Are the artifacts installed with their preservation/protection in mind?				
Do you have a large enough, accessible, and secure area for an exhibit gallery?				
How much and what kinds of staff/volunteers do you need to construct the exhibit? Are the various tasks coordinated, i.e. researching, writing text, artifact installation, exhibit case manufacture, etc?				
What are the opportunities for visitor feedback?				

Continued on next page

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Is evaluation from audiences a regular part of exhibit development/planning?				
Is there an assigned person responsible for assessing and follow-up on comments?				
Does the exhibit work?				
Are visitors leaving understanding your message?				
Does it appeal to those audiences you targeted?				
What parts of the exhibit did the visitor enjoy most?				
What considerations have you made for publicity?				
Are public programs integral to the exhibit?				
Will you take time to celebrate?				

STAFFING AND PROFESSIONAL DEVELOPMENT

Staff Training and Education Checklist

Elements	Acceptable	Needs Improvement	Priority	Not Applicable
Does your repository employ, or have as a volunteer, any staff with professional training and experience?				
If your repository does not have any professional staff, is it making plans to hire or recruit a qualified volunteer?				
Does your repository utilize volunteer workers?				
Are there enough experienced staff members to train and supervise volunteers?				
Are staff members familiar with the Code of Ethics for Archivists and/or the AASLH's Statement of Professional Standards and Ethics?				
Have staff members joined professional organizations? Are they aware of what conferences, workshops, and other training opportunities are available?				
Does your repository have funds to send its staff to conferences, workshops, and other training opportunities?				
Does your repository pursue other ways to fund staff attendance at conferences, workshops, and other training opportunities, including association scholarship opportunities?				