CLASS 7 LESSON PLAN

Surveys and Assessments

Resources for the Teacher


Brief video companion to Beth Patkus’s Assessing Preservation Needs: A Self-Survey Guide. Provides visual information on the preservation site survey process.


Development of a best-practices model for conservation and preservation assessment plans for cultural collections.


This article analyzes the type and value of general preservation assessments across a large range of institutions conducting surveys.


This is an excellent starting place to set surveys in context and determine the steps for an institution beginning an assessment of its preservation needs. The document references a number of related resources and points to the CALIPR software available for download. This study covers preliminary planning and surveying of general collections.


This is the original survey used then for comparison in the Teper article cited below.


This Mellon Foundation–funded survey instrument assesses the value of uncataloged or minimally cataloged materials in special or archival collections. Using a Microsoft Access Database (available for downloading), this instrument allows surveying of multiple-format collections using sampling to
ascertain the extent of need of bibliographic control and preservation for unprocessed collections.


An assessment of policies, procedures, facilities storage, environment, disaster management, and staff.


Frost’s survey provides an excellent starting place for A/V collections surveys, issues, and preliminary planning, as well as a sample survey and an explanation of what is needed before starting. The first section explains the need for surveys and the issues for surveying materials that require machinery to assess quality of information.


While essentially a survey assessment recommendation for museum collections, this Web site provides the type of methodology and justification needed for an environmental assessment survey.


This article explains the methodology and reason for conducting a survey using two institutions as examples. A short article, but explains well the reasoning that goes into the decision making for conducting a survey.


This study was done in two phases, relying on qualitative and quantitative data gathering. In Phase I, statistical information and additional quantitative data on preservation activities were collected in a survey of 116 member libraries of the University Libraries Group, from major non-ARL land grant institutions, and from leading liberal arts colleges (informally known as the Oberlin Group). The data were compared with information previously published in ARL Preservation Statistics for 2000–2001. Phase II focuses on qualitative data that complement the statistical data. Qualitative data were gathered by making 20 site visits to institutions representing the three surveyed groups, plus the ARL.


A discussion of ten components and four models for mature preservation programs, with benchmarks. Case studies included.


This article discusses the scope and purpose of the needs assessment survey. It provides a comprehensive list of questions to ask in order to identify preservation needs and risks to the collections. Surveys help set priorities, and this site helps set goals and decision making for that prioritization. The article also outlines how to do a preservation assessment.


This document assists cultural heritage staff who enter “inadequate storage” spaces to look at collections. It includes advice for how to protect yourself and questions to ask of institution staff. The document presumes a lack of knowledge about the site to be surveyed and how to determine safety issues before beginning the survey.


This tool provides a starting point for understanding a self survey, how to conduct one, what to look for, and how to analyze the results of the survey data.


This Web site creates sets of random numbers based on data input by the user. This is a tool to use for random samples of known numbers of volumes/items in a collection, to provide truly random samples for surveying.


This tool for examining the preservation environment focuses on the condition of the physical building as a protective envelope for collections and the means of storage utilized within the facility.


This article compares the results of a 2003 preservation survey with a 1989 study. See Tina Chrzastowski for the reference to the 1989 survey.


This is a partial report done in 1989. The Web site shows the structure of the survey and preliminary results, and is a good example of the type of information given in a final report on the results of a survey. Putting the results in the context of survey design is an important feature highlighted here.