

# SELF-EVALUATION TOOL FOR MUSEUM STORAGE



## WHAT IS THE TOOL USED FOR?

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- Museums can obtain have a snapshot view of their current situation and a have preliminary diagnosis.
- Museums will have information to help them them decide whether they should embark on a storage reorganization project.
- Museums can focus more clearly on the key deficiencies of their storage.

## HOW WAS IT DEVELOPED?

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- The self-evaluation tool was developed by ICCROM following a review of existing questionnaires and checklists used in past storage management projects.
- The benchmarks presented are limited to forty-three to keep you focused and avoid a lengthy, mechanical and de-motivating process.

## WHO SHOULD USE IT?

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- Those who believe that stored collections play an important role in education, learning and enjoyment of the public.
- Those who do not have access to professional expertisewant to make the most of the available resources: human, material and financial.
- Those who wish to assess their situation by themselves and identify the aspects that are satisfactory and those that need improvement.
- Those who plan to teach storage reorganization to others.

## HOW DOES IT WORK?

- The tool is organized around four areas of responsibility. Each one is dedicated to a fundamental element of museum storage:

**[M] MANAGEMENT**

**[B] BUILDING & SPACE**

**[C] COLLECTION**

**[F] FURNITURE & SMALL EQUIPMENT**

- Under each area, a number of benchmarks have been listed.
- Each benchmark is followed by a list of options. Choose the option closest to your reality and write the score in the box. Example:

M.7 THE STORAGE AREAS ARE CLEANED REGULARLY (FLOORS, RUBBISH, GENERAL DUSTING)

**2**

**3** Yes, they are cleaned once a week or more

**2** They are cleaned once a month

**1** They are cleaned once every 6 months

**0** They are never cleaned

- After completing each section (M, B, C, F), add up the final score.
- Circle the score in the appropriate column in the diagnostic table on page 16.

## HOW LONG WILL IT TAKE?

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- If you are familiar with the storage area(s), completing the evaluation should not take more than one hour.
- For those less familiar with the situation, it should not take more than a few hours.

## SUGGESTIONS

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- Before you begin, get the permission and support of your Director.
- Try filling out the questionnaire with a colleague and discuss your assessment together.
- If you are unsure about some of your answers, consult other colleagues.
- You can also ask different staff members to fill out the evaluation (conservators, curators, management) to compare varying perceptions of the same situation.

## HOW TO USE THE RESULTS?

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- To identify the underlying causes of storage areas with known problems.
- To see how the situation can be improved.
- To initiate a dialogue between upper management and staff, between staff, or between museum departments.
- To have quantified evidence that improvements are needed in one or more of the four areas of responsibility.
- To obtain the approval of the museum's upper management to begin storage reorganization.
- To have evidence of the problem to secure funding for building upgrades, collections documentation, new equipment, or a reorganization.
- To monitor the storage areas in time, after the implementation of a reorganization project.

## MANAGEMENT (M)

M.1 SOMEONE IS OFFICIALLY RESPONSIBLE FOR EACH STORAGE AREA

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

M.2 SUFFICIENT STAFF HAVE BEEN ALLOCATED TO THE STORAGE AREAS

- 3** Yes
- 0** No

M.3 STAFF HAVE BEEN ADEQUATELY INSTRUCTED AND ARE TRAINED TO CARRY OUT ALL STORAGE-RELATED ACTIVITIES

- 3** Yes
- 0** No

M.4 WRITTEN PROCEDURES FOR STORAGE ACTIVITIES (E.G. OBJECT RETRIEVAL, OBJECT MOVEMENT, CLEANING AND MAINTENANCE, VISITOR ACCESS) EXIST AND ARE KNOWN BY ALL STAFF

- 3** Yes, there are procedures for all of these activities
- 2** There are procedures for most of these activities
- 1** For less than half
- 0** No, there are no written procedures for these activities

M.5 ACCESS TO STORAGE AREAS IS RESTRICTED AND MONITORED

- 3** Entrance to storage is monitored
- 1** Entrance is not monitored but it is restricted to museum staff
- 0** Entrance is not monitored and not restricted to staff

## MANAGEMENT (M)

M.6 AT LEAST ONCE A YEAR THERE IS A GENERAL INSPECTION OF THE STORAGE AREA(S): COLLECTION SURVEY, BUILDING CONDITION, DUST, SECURITY, PESTS, ETC.

- 3** Yes, at least once a year
- 0** No, this does not occur at least once a year

M.7 THE STORAGE AREAS ARE CLEANED REGULARLY (FLOORS, RUBBISH, GENERAL DUSTING)

- 3** Yes, they are cleaned once a week or more
- 2** They are cleaned once a month
- 1** They are cleaned once every six months
- 0** They are never cleaned

M.8 THE MUSEUM HAS A WRITTEN EMERGENCY PREPAREDNESS PLANS

- 3** There is an emergency plan, regularly updated and applied by staff
- 1** There is an emergency plan, but it is not updated nor applied by staff
- 0** There is no emergency plan

M.9 RELATIVE HUMIDITY (RH) AND TEMPERATURE (T) IN THE STORAGE AREA(S) ARE MONITORED AND ANALYZED REGULARLY

- 3** RH & T are monitored constantly and data is analyzed regularly
- 2** RH & T are monitored constantly, but data is not analyzed
- 1** RH & T are only measured occasionally
- 0** RH & T are never measured

### TOTAL SCORE FOR PART M

Circle this score in column M of the diagnostic table on page 16.

## BUILDING & SPACE (B)

### BUILDING AND THE EXTERIOR

B.1 THE BUILDING IS LOCATED IN AN AREA WITH NO RISK OF FLOODING

- 6** The building is not at risk of flooding
- 4** The building is at low risk of flooding
- 2** The building is at risk of flooding
- 0** Floods occur regularly in the storage areas

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

- 6** Yes, the building protects the collection from all rain and weather extremes
- 4** The building has minor flaws
- 2** The building is in overall good condition, but it cannot withstand the weather extremes
- 0** The building is in very poor condition and offers no protection from weather extremes

B.3 DOORS AND WINDOWS ARE SECURE (SECURITY LOCKS, SECURITY GRILLS)

- 3** All doors and windows are secure
- 1** Some doors and/or some windows are secure
- 0** None of the doors or windows are secure

### STORAGE AREAS AND THE BUILDING

B.4 THE STORAGE AREAS ARE ALL SITUATED IN ONE SPECIFIC LOCATION WITHIN THE BUILDING

- 6** Yes, the storage areas are all in the same location within the building
- 4** The storage areas are in different locations, but they are well connected to the museum's activities
- 2** The storage areas are dispersed throughout the museum
- 0** Objects are also stored in hallways, offices or wherever space is available

## BUILDING & SPACE (B)

### STORAGE AREAS AND THE BUILDING

B.5 THE MUSEUM HAS A DESIGNATED SPACE FOR RESEARCH AND CONSULTATION

- 3** Yes, there is a designated space for research and consultation
- 1** There is no such space, but when necessary, it can be arranged
- 0** Research and consultation occurs within the storage areas

B.6 THERE IS A DESIGNATED SPACE OUTSIDE THE STORAGE AREA(S) FOR THE TEMPORARY HOLDING AND PREPARATION OF OBJECTS DESTINED FOR STORAGE

- 3** Yes, there is a designated space for holding and preparation
- 1** There is no designated space but when necessary, it can be arranged
- 0** Temporary holding and preparation of objects occurs within the storage areas

B.7 IT IS SAFE AND EASY TO MOVE OBJECTS FROM THE STORAGE AREA(S) TO OTHER FUNCTIONAL AREAS OF THE MUSEUM (EXHIBITION, CONSERVATION LAB, ETC.)

- 3** All routes between the storage areas and other functional areas of the museum (including the loading bay) are free from obstacles; they are suitable to move large objects and carts loaded with objects
- 2** Routes include corners and movement between floors, but no obstacles
- 1** Routes include corners and movement between floors, and obstacles
- 0** Routes are extremely difficult or obstructed

### INSIDE THE STORAGE AREAS

B.8 THERE ARE NO DOORS OR WINDOWS ON THE EXTERIOR WALLS (ADJACENT TO THE OUTSIDE) OF THE STORAGE AREA(S)

- 3** There are absolutely no doors or windows on exterior walls
- 1** Windows and doors occupy less than 20% of the wall space
- 0** Windows and doors occupy more than 20% of the wall space

## BUILDING & SPACE (B)

### INSIDE THE STORAGE AREAS

B.9 THE WALLS, FLOORS AND CEILING OF THE STORAGE AREA(S) ARE IN GOOD CONDITION

- 3** Yes, the walls, floors and ceiling are in good condition
- 2** There are visible signs of past deterioration (water stains, cracks, pests, etc.)
- 1** The walls, floors and ceiling are in relatively good condition, but they are old and likely to lapse into a poor condition fairly soon
- 0** There are visible signs of current deterioration (damp walls and ceiling, condensation, pests) or defects (improper electric wiring, faulty plumbing, etc.)

B.10 THERE ARE NO WATER VALVES, WATER TAPS, OR PIPES OF ANY KIND (WATER, STEAM, DRAINAGE, SEWAGE) WITHIN, ABOVE OR BENEATH THE STORAGE AREAS

- 3** There are no valves, pipes or water taps running through the storage areas
- 2** There are valves, pipes or water taps, but they are not exposed
- 1** There are exposed valves, pipes or water taps
- 0** There are exposed valves, pipes or water taps and they are over thirty years old

B.11 THERE ARE ABSOLUTELY NO PACKING MATERIALS, DISPLAY PANELS, SHOWCASES AND OFFICE FURNITURE, PUBLICATIONS OR ANY OTHER NON-COLLECTION ITEM IN THE STORAGE AREA(S)

- 6** The storage areas are reserved exclusively for the collection
- 2** Collections occupy most of the space
- 0** Most of the space is occupied by items or materials other than the collection

B.12 THERE IS ENOUGH SPACE BETWEEN THE STORAGE UNITS FOR A PERSON TO MOVE SAFELY WHEN CARRYING OBJECTS BY HAND OR USING A CART

- 3** Yes, there is enough space between all the storage units
- 2** Most of the storage units are adequately spaced for safe handling
- 1** It is difficult to move objects safely between most of the storage units
- 0** It is impossible to move objects safely between any of the storage units



## BUILDING & SPACE (B)

### INSIDE THE STORAGE AREAS

B.13 BASED ON YOUR EXPERIENCE, THE STORAGE AREAS WILL BE FULL

- 6 In ten years
- 3 In two years
- 0 The storage areas are already full

### TOTAL SCORE FOR PART B

Circle this score in column B of the diagnostic table on page 16.

# COLLECTION (C)

## DOCUMENTATION SYSTEM

C.1 THERE IS AN ACCESSION REGISTER AND IT RECORDS EACH OBJECT'S ACCESSION NUMBER AND DATE

- 6** Yes, an accession register exists and the number and date of all objects are recorded within it
- 4** An accession register exists and it records dates and numbers for about 80% of the objects
- 2** An accession register exists and it records dates and numbers for about 30% of the objects
- 1** An accession register exists and it records dates and numbers for about 10% of the objects
- 0** There is no accession register

C.2 EACH OBJECT HAS A UNIQUE ACCESSION NUMBER THAT IS MARKED ON THE OBJECT AND IN THE ACCESSION REGISTER

- 6** Yes, this is the case for all the objects
- 4** For more than half the objects
- 2** For less than half the objects
- 0** No object is marked with its number and it does not appear in the accession register

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

- 6** Yes, the documentation includes the dimensions and weight of all objects
- 4** For more than half of the objects
- 2** For less than half of the objects
- 0** No, for none of the objects

C.4 THE DOCUMENTATION FOR EACH OBJECT INCLUDES A LIST OF ITS CONSTITUENT MATERIALS

- 3** Yes, each object's documentation includes a list of its constituent materials
- 2** For more than half of the objects
- 1** For less than half of the objects
- 0** No, for none of the objects

# COLLECTION (C)

## DOCUMENTATION SYSTEM

C.5 EVERY STORAGE ROOM, AISLE, AND STORAGE UNIT IS NUMBERED AND LABELLED VISIBLY 

- 3** Yes, all of them are numbered and labelled visibly
- 2** More than half
- 1** Less than half
- 0** There is no location system

C.6 EACH OBJECT HAS BEEN GIVEN A UNIQUE LOCATION IN EACH UNIT AND IT IS RECORDED IN THE DOCUMENTATION 

- 6** All objects have a unique location in each unit, which is always recorded in the documentation
- 4** More than half of the objects
- 2** Less than half of the objects
- 0** No object has a unique location in each unit, or, none of them are recorded in the documentation

## ACCESS & USE

C.7 ALL OBJECTS IN STORAGE ARE VISIBLE 

- 3** All objects are clearly visible
- 2** Most objects are clearly visible, visibility of others is difficult
- 1** Visibility of most objects is difficult
- 0** Overall visibility of the objects is very poor

C.8 OBJECTS CAN BE RETRIEVED WITH LIMITED HANDLING OF OTHER OBJECTS 

- 3** A maximum of three objects must be handled in order to obtain the one desired
- 2** In some cases, more than three objects must be handled
- 1** 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

## COLLECTION (C)

### ACCESS & USE

C.9 IT TAKES A MAXIMUM OF THREE MINUTES TO FIND AN OBJECT IN THE STORAGE AREA(S) BY USING THE DOCUMENTATION SYSTEM

- 3** All objects can be located within three minutes
- 2** Three to ten minutes are required to locate most objects
- 1** At least ten minutes are required to locate most objects
- 0** Most objects cannot be located using the current documentation system

C.10 THE MUSEUM USES A MOVEMENT CONTROL BOOK TO RECORD ANY CHANGE (EVEN TEMPORARY) IN THE OBJECT'S LOCATION, FROM STORAGE TO: DISPLAY, RESEARCH, LABS, LOAN, OTHER INSTITUTIONS

- 3** Yes, a movement control book is used
- 0** No, a movement control book is not used

### PESTS, DUST & CLIMATE

C.11 OBJECTS ARE FREE FROM PESTS

- 6** The entire collection is free from active pest infestations
- 1** Most of the objects are in good condition but some are infested
- 0** Most objects are actively infested

C.12 OBJECTS AND STORAGE UNITS ARE DUST FREE

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

# COLLECTION (C)

## PESTS, DUST & CLIMATE

C.13 THE CLIMATE IN THE STORAGE IS APPROPRIATE FOR THE COLLECTIONS

- 3 Yes, the climate is appropriate for all objects in the collection
- 2 The climate is appropriate for most of the collection
- 1 I don't know
- 0 For most of the collections, the climate is inappropriate

## TOTAL SCORE FOR PART C

Circle this score in column C of the diagnostic table on page 16.

# FURNITURE & SMALL EQUIPMENT (F)

## STORAGE FURNITURE

F.1 NO OBJECT IS PLACED DIRECTLY ON THE GROUND

- 6** There are no objects placed directly on the ground
- 4** A few objects are placed directly on the ground, for specific reasons
- 2** Most of the objects are placed directly on the ground, without justification
- 0** All the objects are on the ground

F.2 MOST STORAGE UNITS CAN ACCOMMODATE THE GROWING COLLECTION

- 6** For the next five years
- 4** For the next two years
- 2** The storage units are already full
- 0** The storage units are overcrowded

F.3 THE DIMENSIONS OF THE STORAGE UNITS ARE ADAPTED TO THE DIMENSIONS OF THE OBJECTS

- 3** Yes, for all the storage units
- 2** For most of the storage units
- 0** The dimensions of the storage units are not adapted to the dimensions of the objects

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

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

## SMALL EQUIPMENT, PADDING & MOUNTS

F.5 SPECIFIC CARTS, TRAYS, LADDERS HAVE BEEN SPECIFICALLY ASSIGNED TO EACH STORAGE AREA

- 3** Yes, such equipment is always present in each storage area
- 1** Some equipment exists in the museum, but none has been specifically assigned to the storage area(s)
- 0** No, there is no such equipment

# FURNITURE & SMALL EQUIPMENT (F)

## SMALL EQUIPMENT, PADDING & MOUNTS

F.6 THERE ARE FIRE DETECTION DEVICES THAT ARE REGULARLY CHECKED AND IN WORKING ORDER

- 3** Detectors are installed, regularly checked and are in working order
- 1** Detectors are installed but not regularly checked
- 0** There are no detectors

F.7 THERE ARE PORTABLE FIRE EXTINGUISHERS IN AND AROUND THE STORAGE AREAS, WHICH ARE REGULARLY CHECKED AND DESIGNATED STAFF ARE TRAINED TO OPERATE THEM

- 6** There are adequate portable fire extinguishers, they are checked regularly and designated staff are trained to operate them
- 2** There are adequate 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 AND OTHER PACKAGING MATERIALS

- 3** Yes, all special objects have them
- 2** Most of the objects
- 1** Some of the objects
- 0** No boxes, padding, mounts or other packaging materials are used to protect the special objects

## TOTAL SCORE FOR PART F

Circle this score in column F of the diagnostic table on page 16.

# CONGRATULATIONS! NOW, RATE YOUR STORAGE

	MANAGEMENT (M)	BUILDING & SPACE (B)	COLLECTION (C)	FURNITURE & SMALL EQUIPMENT (F)
<b>GREAT! THE SITUATION SEEMS FINE</b>		54	54	
		53	53	
		52	52	
	30	51	51	33
	29	50	50	32
	28	49	49	31
	27	48	48	30
	26	47	47	29
	25	46	46	28
	24	45	45	27
<b>SMALL IMPROVEMENTS ARE NEEDED</b>		44	44	26
		43	43	
		42	42	
		41	41	
	23	40	40	25
	22	39	39	24
	21	38	38	23
	20	37	37	22
	19	36	36	21
	18	35	35	20
<b>YOU NEED A REORGANIZATION PROJECT</b>	17	34	34	19
	16	33	33	18
		32	32	17
		31	31	16
		30	30	15
		29	29	14
		28	28	13
		27	27	12
	15	26	26	11
	14	25	25	10
<b>YOUR COLLECTION IS AT SERIOUS RISK</b>	13	24	24	9
	12	23	23	8
	11	22	22	7
	10	21	21	6
	9	20	20	5
	8	19	19	4
		18	18	3
		17	17	2
		16	16	1
		15	15	0
	14	14		
	13	13		
	12	12		
	11	11		
	10	10		
	9	9		
	8	8		
	7	7		
	6	6		
	5	5		
	4	4		
	3	3		
	2	2		
	1	1		
	0	0		

MUSEUM:

ASSESSOR'S NAME:

DATE OF ASSESSMENT: