

# Appendix A: Client Contact Form

This form is designed for use by a CAP assessor conducting an initial telephone interview with a staff member from an institution requesting a conservation assessment. The information gathered during the interview can serve as the basis from which the assessor develops an agreement with the institution to carry out the assessment, and can help to assure that all parties concerned agree on the scope of the assessment and the expected results.

Date of interview \_\_\_\_\_

## Institutional Profile

Name of institution/museum \_\_\_\_\_

Contact \_\_\_\_\_ Title \_\_\_\_\_

Phone \_\_\_\_\_

Address \_\_\_\_\_

Type of institution

- |   |  |
|---|--|
| <input type="checkbox"/> Aquarium                 | <input type="checkbox"/> Natural history museum    |
| <input type="checkbox"/> Arboretum/botanic garden | <input type="checkbox"/> Nature center             |
| <input type="checkbox"/> Art museum               | <input type="checkbox"/> Planetarium               |
| <input type="checkbox"/> Children's/youth museum  | <input type="checkbox"/> Science/technology museum |
| <input type="checkbox"/> Historic house/site      | <input type="checkbox"/> Zoo                       |
| <input type="checkbox"/> History museum           | <input type="checkbox"/> Other _____               |

Governance (who owns the institution and collections)

- |  |   |
|--|---|
| <input type="checkbox"/> Non-profit organization       | <input type="checkbox"/> College/University |
| <input type="checkbox"/> Municipal government          | <input type="checkbox"/> County government  |
| <input type="checkbox"/> State government              | <input type="checkbox"/> Federal government |
| <input type="checkbox"/> School district               | <input type="checkbox"/> Religious group    |
| <input type="checkbox"/> Park or recreational district | <input type="checkbox"/> Other _____        |

Date of establishment of institution \_\_\_\_\_

How many staff are employed by the institution?

Full-time, paid \_\_\_\_\_ Part-time, paid \_\_\_\_\_

Full-time, volunteer \_\_\_\_\_ Part-time, volunteer \_\_\_\_\_

Please indicate which functions are carried out by paid staff and which by volunteer staff.

	<b>Paid</b>	<b>Volunteer</b>
Administration	<input type="checkbox"/>	<input type="checkbox"/>
Conservation	<input type="checkbox"/>	<input type="checkbox"/>
Curatorial	<input type="checkbox"/>	<input type="checkbox"/>
Registration	<input type="checkbox"/>	<input type="checkbox"/>
Building maintenance/preservation	<input type="checkbox"/>	<input type="checkbox"/>
Housekeeping	<input type="checkbox"/>	<input type="checkbox"/>
Visitor education	<input type="checkbox"/>	<input type="checkbox"/>
Exhibition preparation	<input type="checkbox"/>	<input type="checkbox"/>
Packing/shipping	<input type="checkbox"/>	<input type="checkbox"/>

## Collections and Exhibitions

What kinds of collections does the institution own?

- |   |  |
|---|--|
| <input type="checkbox"/> Archaeology                            | <input type="checkbox"/> Library/archival material       |
| <input type="checkbox"/> Arms & armor/weapons                   | <input type="checkbox"/> Metalwork/metal sculpture       |
| <input type="checkbox"/> Botany                                 | <input type="checkbox"/> Musical instruments             |
| <input type="checkbox"/> Ceramics & glass                       | <input type="checkbox"/> Paintings (panel/canvas)        |
| <input type="checkbox"/> Ethnography                            | <input type="checkbox"/> Photographic materials          |
| <input type="checkbox"/> Film/sound recordings                  | <input type="checkbox"/> Science/technology/medicine     |
| <input type="checkbox"/> Furniture/wood artifacts and sculpture | <input type="checkbox"/> Stone artifacts & sculpture     |
| <input type="checkbox"/> Textiles & costume                     | <input type="checkbox"/> Geology/mineralogy/paleontology |
| <input type="checkbox"/> Transportation vehicles                | <input type="checkbox"/> Watercolors/drawings/prints     |
| <input type="checkbox"/> Historic objects                       | <input type="checkbox"/> Wet collections                 |
| <input type="checkbox"/> Industrial machinery                   | <input type="checkbox"/> Zoology                         |

What kinds of records exist for the collection?

- |   |  |
|---|--|
| <input type="checkbox"/> Accession card   | <input type="checkbox"/> Inventory           |
| <input type="checkbox"/> Computer records | <input type="checkbox"/> Videotape/videodisc |
| <input type="checkbox"/> Digital images   |  |
| <input type="checkbox"/> Ledgers/Binders  | <input type="checkbox"/> Other _____         |

What type of exhibits does the institution have?

- Museum galleries
- Period rooms / static displays
- Permanent exhibits with rotating collections
- Demonstration, interior [cooking, weaving, industrial production, etc.]
- Demonstration, exterior [farm, construction, etc.]
- Other \_\_\_\_\_

## Building(s)

How many buildings does the institution occupy? \_\_\_\_\_

Are they all on the same site?  Yes  No

If no, where are the buildings located? \_\_\_\_\_

How many sites does the institution maintain? \_\_\_\_\_

Does the institution own the building(s) or site(s) in which its collections are housed?  Yes  No

If no, who owns the building(s) or site(s)? \_\_\_\_\_

Are the buildings that the institution occupies historic structures (50 years or older)?  Yes  No

If yes, has a Historic Structures Report been carried out for the building(s)?  Yes  No

If yes, is the site a National Historic Landmark?  Yes  No

Size of the building \_\_\_\_\_

Total square footage usable space \_\_\_\_\_

Number of rooms \_\_\_\_\_

Number of floors \_\_\_\_\_

Basement  Yes  No

Attic  Yes  No

### Building Use

What portion of the total space is devoted to exhibitions? \_\_\_\_\_ %

What portion of the total space is devoted to storage of collections? \_\_\_\_\_ %

Are the institution's collections stored in specially designed storage facilities?  Yes  No

What other functions are carried out in the building?

Food service

Entertaining

Retail sales

Public education

Lectures and demonstrations

Employee lounge

Storage of non-collection materials

Other \_\_\_\_\_

Specify \_\_\_\_\_

At what times is the institution open?

To staff

To public

Weekdays \_\_\_\_\_

\_\_\_\_\_

Weekends \_\_\_\_\_

\_\_\_\_\_

Does the institution close at any of the following times?

During the winter (specify months) \_\_\_\_\_

During the summer (specify months) \_\_\_\_\_

### Environmental Controls

Do any of the buildings have environmental controls?  Yes  No

If yes, what type? (complete for each building)

Central HVAC

Central heating

Central AC

Window AC units

Humidification

Dehumidification

local or  central reheat

local or  central reheat

Are there lighting controls for

Visible  Yes  No

UV  Yes  No

Are environmental conditions monitored?  Yes  No

If yes, who is responsible for monitoring? \_\_\_\_\_

What records are kept and since when? \_\_\_\_\_

## Miscellaneous

What kinds of surveys or assessments has the institution undertaken or is now undertaking?

Year

- |  |       |
|--|-------|
| <input type="checkbox"/> Conservation Assessment Program (CAP)       | _____ |
| <input type="checkbox"/> Museum Assessment Program (MAP)             | _____ |
| <input type="checkbox"/> Collections                                 | _____ |
| <input type="checkbox"/> Governance                                  | _____ |
| <input type="checkbox"/> Institutional                               | _____ |
| <input type="checkbox"/> Public Dimension                            | _____ |
| <input type="checkbox"/> Historic Structures Report                  | _____ |
| <input type="checkbox"/> National Park Service Conditions Assessment | _____ |
| <input type="checkbox"/> Energy audit                                | _____ |
| <input type="checkbox"/> Collection or building conservation         | _____ |
| Describe _____   | _____ |

What led the institution to request this conservation assessment?

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For what purposes will this assessment be used?

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Who will be the primary contact or institutional coordinator for the assessment?

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