PRE-ACQUISITION COLLECTION SURVEY

Once contact has been made with a potential donor or seller, and research has been conducted to establish the context of the materials, it is recommended to conduct a survey.

Site visits are an exercise in collection development, donor relations, and risk assessment that can help archivists to better steward their institutions' resources. While it may appear more cost-effective to accept a collection without a site visit, costs for transport, review, rehousing, and disposition and/or return of unwanted materials can be significant.

A site visit may not always be possible, particularly if the collection is not held near the archival repository. A remote site visit, such as one conducted via videoconferencing or a pre-recorded video, can be a compromise.

- Make sure to ask for a view of every area where collections are stored and a look into a sampling of boxes or cabinets.
- Request a closer look at anything that looks like a potential issue.

Before an Onsite Survey

☐ Ask about logistics:

1. Who you will be meeting with and their relationship to the collection
2. How to access the building and where to park
3. How you can contact the donor(s) if you need to reschedule (and vice versa)

☐ Review policies for your institution:

1. Does your institution provide a vehicle or vehicle rental for staff to use? Are any certifications or permissions required ahead of time?
2. What travel paperwork does your institution require in advance?
3. Is use of a personal vehicle permitted? Are reimbursements for mileage or fuel provided?
4. Are there potential liability issues if you must transport a passenger?

☐ Plan what to bring:

- ☐ Note-taking materials

- ☐ Flashlight (or cell phone with flashlight function)
- ☐ Measuring tape
- ☐ Gloves and other safety equipment
- ☐ Post-it notes
- ☐ A preliminary idea of what you're hoping is in the collection
- ☐ Talking points about how the collection would be used or how it fits into your collecting scope
- ☐ A colleague: A colleague can offer additional perspectives, help move heavy boxes, and engage in conversation with the donor so you can focus on reviewing materials. If you're not already familiar with the donor, a colleague can also offer additional safety.
    - If you cannot find a colleague to accompany you and are not comfortable meeting alone with a donor at a non-public place, *do not do so*.
    - You might ask the donor to bring a sampling of the materials to your repository or help you conduct a remote survey instead.
    - If your colleague is not regularly involved with donor visits, talk with them ahead of time about what they can expect and what you expect of them.

During the Survey

- Look for:
    - ☐ Preservation issues, either evident on the materials themselves or in their surroundings
        1. Are there visible pests, droppings, or evidence of pest damage?
        2. Is there standing water, water damage, or mold?
        3. Does the space have any environmental controls such as heating, air conditioning, or dehumidifiers?
        4. Are the materials stored in a smoking environment?
    - ☐ Objects that you do not have the capacity to store

- ☐ Audiovisual or born-digital materials that may require specialized equipment or additional information
- ☐ Materials that appear obviously outside of your collecting scope
- ☐ PII or confidentiality issues

- Survey potential transport barriers:
  1. Are the materials accessible only via stairs?
  2. Is there available parking at the building's entrance?

- Gather information:
  - ☐ Extent
  - ☐ Organization and arrangement trends
  - ☐ Types (or lack thereof) of storage containers
  - ☐ Stability and transportability of current housing—will the materials need to be rehoused before transfer?
  - ☐ Quantity, size, and format of oversized items that may require special packing
  - ☐ Brief descriptions of containers and whether file/box labels are descriptive and accurate
  - ☐ Type (make/model) and content of media carriers, as well as description labels added by creator/donor. Note if cords are included or missing.
  - ☐ Details on computer operating system, software, and other hardware such as cameras or intermediary storage devices