



Archival Needs Assessment  
Application Form  
SAMPLE

**Organization Name:** Willingboro Historical Society

**Director:** Julie Cortland

**Address:** 213 Ridge Rd  
Willingboro, NY 11599

**Phone:** 585-312-3113

**Fax:** 585-312-3114

**Email:** info@whs.org

**Institution's Website Address:** <http://whs.org>

**Contact Person:** John Marshall

**Phone:** 585-312-3113

**Title:** Associate Director

**Fax:** 585-312-3114

**Email:** info@whs.org

## INSTRUCTIONS

Please send one copy of a completed application form to DHSPNY at the Conservation Center for Art & Historic Artifacts (CCAHA) and one copy of the following: commitment letter from Director or Board Chair; proof of tax exempt status; most recent annual financial statement; list of board members; staff lists; written policy statements and any other relevant background information such as brochures, rack cards, survey summaries, etc.

**Application materials are always accepted. Application deadline to be announced.**

The **application form** is divided into a narrative and a general information section. Responses to the narrative section should be provided on a separate sheet. In the general information section, check off all applicable answers to each question. If a question is not relevant to your organization, circle the question number. If you are a department, division, or section of a larger organization (ex: archives department in a larger museum, a university archive or library) please answer questions about staff and budget in regards to your department, division, or section rather than the institution as a whole.

The **commitment letter** should demonstrate the organizational and board support necessary for supporting an archival program and identify individuals responsible for pursuing recommendations as suggested in an assessment. Depending on your organization, this letter should be signed by the Executive Director or Board Chair.

DHSPNY Staff is available to assist you in completing the application form. Please call Anastasia Matijkiw, DHSPNY Program Coordinator, for assistance or additional information at 215-545-0613 or [amatijkiw@dhpsny.org](mailto:amatijkiw@dhpsny.org).

Return completed form to:      Documentary Heritage and Preservation Services for New York  
Conservation Center for Art and Historic Artifacts  
264 South 23<sup>rd</sup> Street  
Philadelphia, PA 19103  
[info@dhpsny.org](mailto:info@dhpsny.org)

**Section I - Application Narrative**

Please answer these questions on a separate sheet (four pages maximum).

1. What is the historical significance or uniqueness of your archival collection, and how are your collections related to the mission of your organization?
2. Why is having an archival needs assessment appropriate for your organization at this time?
3. Are archival collections at your organization arranged and described? Please estimate the percentage of the collection that is (a) accessioned, (b) inventoried, (c) processed (i.e. archival materials with a finding aid), and (d) accessible online.
4. What actions have been taken to care for your archival collection? For example, rehousing and processing collections, upgrading storage or exhibition conditions, improving the environment, or microfilming.
5. Has your organization received grant funding in the last three years?
6. What do you feel are of areas of concern for your organization’s archival program? Check off all relevant areas below and comment on specific concerns.

Administration:

- staffing
- funding
- policies, procedures, and planning
- reference, access, and outreach
- \_\_\_\_\_

Preservation:

- building and environment
- security and emergency preparedness
- collections storage
- collections care
- \_\_\_\_\_

Collections Management:

- arrangement and description
- processing and cataloging priorities
- collections growth
- records management
- electronic records
- \_\_\_\_\_

Other:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Section II - General**

**County:**

- |                                     |                                      |                                     |                                     |  |
|-------------------------------------|--------------------------------------|-------------------------------------|-------------------------------------|--|
| <input type="checkbox"/> Albany     | <input type="checkbox"/> Alleghany   | <input type="checkbox"/> Bronx      | <input type="checkbox"/> Broome     | <input type="checkbox"/> Cattaraugus     |
| <input type="checkbox"/> Cayuga     | <input type="checkbox"/> Chautauqua  | <input type="checkbox"/> Chemung    | <input type="checkbox"/> Chenango   | <input type="checkbox"/> Clinton         |
| <input type="checkbox"/> Columbia   | <input type="checkbox"/> Cortland    | <input type="checkbox"/> Delaware   | <input type="checkbox"/> Dutchess   | <input checked="" type="checkbox"/> Erie |
| <input type="checkbox"/> Essex      | <input type="checkbox"/> Franklin    | <input type="checkbox"/> Fulton     | <input type="checkbox"/> Genesee    | <input type="checkbox"/> Greene          |
| <input type="checkbox"/> Hamilton   | <input type="checkbox"/> Herkimer    | <input type="checkbox"/> Jefferson  | <input type="checkbox"/> Kings      | <input type="checkbox"/> Lewis           |
| <input type="checkbox"/> Livingston | <input type="checkbox"/> Madison     | <input type="checkbox"/> Monroe     | <input type="checkbox"/> Montgomery | <input type="checkbox"/> Nassau          |
| <input type="checkbox"/> New York   | <input type="checkbox"/> Niagara     | <input type="checkbox"/> Oneida     | <input type="checkbox"/> Onondaga   | <input type="checkbox"/> Ontario         |
| <input type="checkbox"/> Orange     | <input type="checkbox"/> Orleans     | <input type="checkbox"/> Oswego     | <input type="checkbox"/> Otsego     | <input type="checkbox"/> Putnam          |
| <input type="checkbox"/> Queens     | <input type="checkbox"/> Rensselaer  | <input type="checkbox"/> Richmond   | <input type="checkbox"/> Rockland   | <input type="checkbox"/> Saint Lawrence  |
| <input type="checkbox"/> Saratoga   | <input type="checkbox"/> Schenectady | <input type="checkbox"/> Schoharie  | <input type="checkbox"/> Schuyler   | <input type="checkbox"/> Seneca          |
| <input type="checkbox"/> Steuben    | <input type="checkbox"/> Suffolk     | <input type="checkbox"/> Sullivan   | <input type="checkbox"/> Tioga      | <input type="checkbox"/> Tompkins        |
| <input type="checkbox"/> Ulster     | <input type="checkbox"/> Warren      | <input type="checkbox"/> Washington | <input type="checkbox"/> Wayne      | <input type="checkbox"/> Westchester     |
| <input type="checkbox"/> Wyoming    | <input type="checkbox"/> Yates       |                                     |                                     |  |

**Type of Organization:**

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Academic archive              | <input type="checkbox"/> Independent non-profit archive                   |  |
| <input type="checkbox"/> Academic library              | <input type="checkbox"/> Public library                                   | <input type="checkbox"/> Special library |
| <input checked="" type="checkbox"/> Historical Society | <input type="checkbox"/> Historic house/site                              |  |
| <input type="checkbox"/> Museum                        | <input type="checkbox"/> Non-profit with library and archival collections |  |
| <input type="checkbox"/> Other _____                   |   |  |

**A. Staffing and Collection Use**

1. Staff size:  
Full Time: 4 Part Time: 6  
Volunteer: 3 Students/Interns: 0

*Please attach a list of staff, including titles.*

2. Are there staff members assigned archival responsibilities?  Y  N  
 full-time  part-time  committee  other \_\_\_\_\_

3. Is your organization open to the public?  Y  N  
Note hours open. **Monday - Friday 9 AM - 8 PM**  
**Saturday 10 AM - 4 PM**

4. Number of visitors per year: 5,000

5. How do you make your archival materials available to the public and researchers?  
**Exhibitions, Research Library**

6. Number of researchers per year: 40

4. Is there a line item specifically for the archives in the institution's budget?  Y  N

If so, how much funding is allocated for processing and housing supplies? \_\_\_\_\_ n/a \_\_\_\_\_

**B. Surveys and Policies**

1. What surveys/assessments has the institution received or is now being undertaken? Please give approximate dates and surveyor name(s).

- Preservation Needs Assessment \_\_\_\_\_
- Archival Needs Assessment \_\_\_\_\_
- Collection Specific Survey \_\_\_\_\_ 2013, surveyed by consultant Craig Scanlon \_\_\_\_\_
- Historic Structures Report \_\_\_\_\_
- HVAC \_\_\_\_\_ 2015, surveyed by city engineer Martin Bramah \_\_\_\_\_
- Policy/procedures \_\_\_\_\_
- Other \_\_\_\_\_
- Other \_\_\_\_\_

2. The organization has the following policies (check as many as apply and indicate year written):

- Mission Statement \_\_\_\_\_ Written 2015 \_\_\_\_\_
- Collection Management Policy \_\_\_\_\_ Written 2013 \_\_\_\_\_
- Collection Development Policy \_\_\_\_\_ Written 2014 \_\_\_\_\_
- Collection Priorities for Conservation Treatment \_\_\_\_\_
- Collection Priorities for salvage in the event of a disaster \_\_\_\_\_
- Exhibition Policy \_\_\_\_\_
- Loan Policy \_\_\_\_\_
- Access Policy \_\_\_\_\_ Written 2014 \_\_\_\_\_
- Handling Policies \_\_\_\_\_ Written 2014 \_\_\_\_\_
- Registration Procedures for Researchers or Visitors \_\_\_\_\_ Written 2014 \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

3. The institution has the following plans or programs in place (check as many as apply and indicate year written):

- Emergency Preparedness & Recovery Plan \_\_\_\_\_ Written 2014 \_\_\_\_\_
- Environmental Monitoring Program (temperature, relative humidity, and light) \_\_\_\_\_
- Facilities Management Program \_\_\_\_\_
- Fire Protection Program \_\_\_\_\_
- Housekeeping Program \_\_\_\_\_
- In-house Repair Program \_\_\_\_\_
- Pest Management Program \_\_\_\_\_
- Preservation Plan for the Collections \_\_\_\_\_
- Digitization/Reformatting Plan \_\_\_\_\_ Written 2014 \_\_\_\_\_
- Preservation Awareness Training for Staff \_\_\_\_\_
- Security Program \_\_\_\_\_
- Strategic Plan \_\_\_\_\_
- Theft Reporting Plan \_\_\_\_\_

C. **Collections**

Please answer each question as carefully and completely as possible in relation to your **archival** collections.

1. **Archival collection materials date from** 1750 **to** present

2. **Please describe the types of materials in your collection and the size of your collection.**

Our main collection contains approximately 2,000 items documenting the history of the village of Willingboro and the surrounding counties, including maps, scrapbooks, local government records, financial documents, clothing, audio recordings, and visual art.

3. **The most important archival collections are:**

Our biggest special collection is the Frank Medford Collection, which consists of about 1,000 items from the local artist's family archives, including paintings, correspondence, contracts, and other manuscripts. Another major collection is the Patty Melrose Collection, which includes about 200 items relating to the local philanthropist's life and work. In addition, the William H. Middleton Library is housed in our location and consists of 80.5 linear feet of books (dating from 1790-1940) that were donated by the Middleton family from his personal collection.

4. **How much of the archival collection is on exhibition?**

Approximately 10-15%, with plans for additional exhibitions that will hopefully result in large increases in the percentage of materials exhibited.

5. **What types of materials are typically placed on exhibition?**

Paper items, such as books, manuscripts, and maps; clothing, such as uniforms and costumes; and industrial items such as industrial tools, crown wheels, and other machinery from local mills.

6. **In how many buildings are the collections stored?** 1

7. **Have any of the buildings received historic registration?**  Y  N

Note type of registration: Our building was placed on the historic registry in 2016, with a dedication planned for late 2017.

This application was completed by: John Marshall 5/1/2017  
Name/Title Date  
Associate Director

Authorization Signatures: Julie Cortland 5/1/2017  
Executive Director Date  
Saffron Prior 5/1/2017  
Chair of the Board\* Date

\*Note: If the Chair of the Board is not the appropriate title designation, please have the highest ranking official at your organization sign in this location.

**CHECKLIST FOR ENCLOSURES**

Please include **one (1) copy** of the following:

- Completed application form with responses to the narrative section
- Copy of commitment letter from Director or Board Chair
- Proof of tax exempt status
- Most recent annual financial statement
- List of Board members
- Staff list
- Written policy statements
- Other relevant information, such as brochures, rack card, survey summaries, etc.

\* \* \* \* \*

***APPLICATION MATERIALS ARE ALWAYS ACCEPTED. THE NEXT REVIEW PERIOD IS SUMMER 2017.***

**Return completed form to:**

Documentary Heritage and Preservation Services for New York  
Conservation Center for Art and Historic Artifacts (CCAHA)  
264 South 23rd Street  
Philadelphia, PA 19103  
info@dhpsny.org

For further information, contact CCAHA:

Tel: (215) 545-0613  
Fax: (215) 735-9313  
Email: amatijkiw@dhpsny.org  
Web site: www.dhpsny.org

**1. What is the historical significance or uniqueness of your archival collection, and how are your collections related to the mission of your organization?**

The Society's archival collections constitute the most complete existing picture of the history of Willingboro. The collections contains thousands of items, most of which are unique or of special interest to the local area but also serve to document the industrial and labor history and immigrant experience of the northeastern United States in the 19<sup>th</sup> and early-to-mid 20<sup>th</sup> century. The collections form a narrative of a bustling and productive mill town and serve as a reminder of Willingboro's central role in the development of the entire region.

The mission of our research library is "To support the advancement of research, education, and enjoyment of Willingboro's history and culture." To that end, our library hosts several annual events that aim to entertain as well as educate, including the Willingboro Days festival, which features late-19<sup>th</sup> century-themed activities, demonstrations, and period dress. Importantly, we make our collections available by appointment for both personal and academic research. Our library has been utilized by staff from educational institutions around the state, as well local residents for genealogical and other private research.

**2. Why is having an archival needs assessment appropriate for your organization at this time?**

Our archive has long been a repository for nearly everything of historical significance related to Willingboro. Unfortunately, for a very long period of the organization's history we did not employ a professional archivist or trained librarian. Though we now have a small trained professional staff, there is still a significant amount of unprocessed items, and we are beginning to encounter space issues as we continue to acquire new materials. As we aim to improve access and environmental conditions, we realize it is imperative to conduct a needs assessment to form the basis of future planning and implementation goals.

**3. Are archival collections at your organization arranged and described? Please estimate the percentage of the collection that is (a) accessioned, (b) inventoried, (c) processed (i.e. archival materials with a finding aid), and (d) accessible online.**

Approximately 10-15% of our materials have been accessioned and inventoried. About 30% of collections are fully processed with finding aids, and about 80% of our newspaper collections have been digitized and are accessible online. It is hoped that this assessment will help form a roadmap towards the full accessibility of our special collections.

**4. What actions have been taken to care for your archival collection? For example, rehousing and processing collections, upgrading storage or exhibition conditions, improving the environment, or microfilming.**

Our collections of newspapers, broadsides, and other historic posters/advertisements have almost entirely been digitized. For several other collections, we identified a list of priority items in most need of rehousing and additional care. We have also drafted a schedule for processing the backlog of currently unprocessed materials. We are currently researching funding opportunities to support building improvements.

**5. Has your organization received grant funding in the last three years?**

We have received a one-time grant through the Digital Archives Fund program to digitize our collection of newspapers/periodicals. The grant was applied for in 2015 and disbursed in 2016. In addition, we

received a \$2500 special projects grant from the John Quays Foundation in 2016 to support summer educational programming for 2017.

**6. What do you feel are areas of concern for your organization's archival program? Check off all relevant areas below and comment on specific concerns.**

**Administration:** As with many organizations our size, funding is a constant concern. We have no consistent budget for preservation or conservation projects, and we don't have a budget or strategy to promote our archives for research use. We need to increase public awareness of our collections, as well as increase engagement with our local history through the use of our resources.

**Collections Management:** With the exception of one staff member, we have no staff trained in the proper care and access of our special collections. This affects our ability to manage the collection and its growth, which makes it difficult to fulfill our mission. We hope that DHPSNY's recommendations will help inform our staff and direct our collections management efforts.

**Preservation:** Our space has several environmental issues that impact preservation. We currently have no climate control monitoring or separate climate control for our archival space, and storage and emergency management remain ongoing concerns. Again, it is our intent to use the assessment as a catalyst to improve our space and as a roadmap for the creation of policies that align with the best practices of archiving and special collections.