

**NOTE: applies to original version of form – do not use.  
(links will not work properly)**

**INSTRUCTIONS FOR COMPLETING THE SURVEY FORM**

1. Read the Comments and Notes after each box for instructions on how to complete the box.
2. Click on any underlined and highlighted word or term to find its definition.
3. Some of the responses will require a specific action under part C. What Needs to Be Done. These are displayed in **Red type**. Click on the [symbol](#) (❖) following the term for more information.

**SURVEY FORM**

**PAPER BASED ITEMS**

*Attach Barcode Here.*

Collection: \_\_\_\_\_ Date completed: \_\_\_\_\_

Assessor: \_\_\_\_\_

**DATA ENTRY COMPLETE?**

**COMMENT:** complete the above box with the 3 letter code for the location being surveyed, today's date, and your initials.

**CHECK ALL THAT APPLY unless otherwise specified**

- Paper or other things found in item that don't belong to item
- Item shelved on spine or fore-edge.

**A. What is it? General Description.**

**A.1. TYPE (pick one):**

- [Book](#)
- [Pamphlet](#) (single signature)
- [Portfolio](#) (unbound paper, etc.)
- Other – Paper based** ❖

**COMMENTS:** Check only one box for question A.1.Type.

**A.2.COVER (pick one – plus “Special Cover” if applicable):**

- |  |   |
|--|---|
| <input type="checkbox"/> <a href="#">Rigid Board – cloth</a>   | <input type="checkbox"/> <a href="#">Econo-bind or Lamijack</a> |
| <input type="checkbox"/> <a href="#">Rigid Board – paper</a>   | <input type="checkbox"/> <a href="#">Pam bound</a>              |
| <input type="checkbox"/> <a href="#">Rigid Board - buckram</a> | <input type="checkbox"/> <a href="#">Thermal Bound</a>          |
| <input type="checkbox"/> <a href="#">Rigid Board – Leather</a> | <input type="checkbox"/> <b>Other – specify</b> _____ ❖         |
| <input type="checkbox"/> <a href="#">Paperback</a>             | <input type="checkbox"/> <a href="#">Special Cover</a>          |

**COMMENTS:** Check only one box for question A.2. Cover.

**EXCEPTION:** If the cover is a “[Special Cover](#)” check that box and check a box that describes the construction of the cover.

**NOTE:** If the cover is constructed of more than one material, select the material that covers the book's [joint](#).

|  |  |
|--|--|
| <b>A.3. ADDITIONAL PROTECTIVE COVERING:</b>                          |  |
| <input type="checkbox"/> <a href="#">NONE</a>                        |  |
| <input type="checkbox"/> <a href="#">Box – paper board</a>           | <input type="checkbox"/> <a href="#">Dust Cover</a>              |
| <input type="checkbox"/> <a href="#">Box – rigid board w/buckram</a> | <input type="checkbox"/> <a href="#">Local box - manila</a>      |
| <input type="checkbox"/> <a href="#">Slip case</a>                   |  |
| <input type="checkbox"/> <a href="#">Portfolio Enclosure</a>         | <input type="checkbox"/> <a href="#">Other – specify _____</a> ❖ |

COMMENTS: Most of the time you will check only one box for question A.3. Additional Protective Covering. It is possible that a book will have more than one protective covering. For example, a book with a [slip case](#) might also be enclosed in a box. Check all that apply. However, if you select “none,” you cannot check other boxes.

|  |  |
|--|--|
| <b>A.4. TYPE OF PAPER (pick one):</b>                                  |  |
| <input type="checkbox"/> <a href="#">Acidic – Non-coated paper</a>     | <input type="checkbox"/> <a href="#">Multiple paper types – acidic (describe)</a> ❖      |
| <input type="checkbox"/> <a href="#">Non-acidic – Non-coated paper</a> | <input type="checkbox"/> <a href="#">Multiple paper types – none acidic (describe)</a> ❖ |
| <input type="checkbox"/> <a href="#">Coated</a>                        |  |
| <input type="checkbox"/> <a href="#">Newspaper</a>                     | <input type="checkbox"/> <a href="#">Other – specify _____</a> ❖                         |
| <input type="checkbox"/> <a href="#">Onion skin</a>                    |  |

COMMENT: Only one box should be checked.

NOTE: In most cases, the book’s paper will be either [non-coated](#) or [coated](#). If it is non-coated, use the pH testing pen to determine whether the paper is acidic. Sometimes the publisher’s comments, description of the book, or the copyright page will state that the paper is non-acidic. In that case, you do not need to test the paper.

NOTE: If only a few pages of illustrations are coated paper and the rest of the book is non-coated, select non-coated. If there is extensive mixing of papers, read the definition of “[Multiple paper types](#).” If the book fits the description, check the appropriate box and describe the types of paper in Section D.

|  |  |
|--|--|
| <b>A.5. LEAF ATTACHMENT (pick one):</b>                      |  |
| <input type="checkbox"/> <a href="#">Double fan adhesive</a> | <input type="checkbox"/> <a href="#">Loose-leaf notebook</a>         |
| <input type="checkbox"/> <a href="#">Signature -STF</a>      | <input type="checkbox"/> <a href="#">Pam bound - Stapled or sewn</a> |
| <input type="checkbox"/> <a href="#">Burst Signatures</a>    | <input type="checkbox"/> <a href="#">Pam bound - Taped</a>           |
| <input type="checkbox"/> <a href="#">Perfect</a>             | <input type="checkbox"/> <a href="#">Spiral bound</a>                |
| <input type="checkbox"/> <a href="#">Oversewn</a>            | <input type="checkbox"/> <a href="#">Unbound pages</a>               |
| <input type="checkbox"/> <a href="#">Sidestitched</a>        | <input type="checkbox"/> <a href="#">Other – specify _____</a> ❖     |
| <input type="checkbox"/> <a href="#">Sidestapled</a>         |  |

COMMENT: Check just one box. If you are not sure (sometimes it is hard to tell how the pages are attached) check with your supervisor.

**A.6. ATTACHMENTS OR INCLUSIONS** [NONE](#)

- |   |   |
|---|---|
| <input type="checkbox"/> <a href="#">Paper item(s)</a>    | <input type="checkbox"/> <a href="#">Foldouts, centerfolds</a>                    |
| <input type="checkbox"/> <a href="#">CD or DVD</a> ❖      | <input type="checkbox"/> <a href="#">Photos or illustrations (glued or taped)</a> |
| <input type="checkbox"/> <a href="#">Diskette</a> ❖       | <input type="checkbox"/> <a href="#">Special Endsheets</a>                        |
| <input type="checkbox"/> <a href="#">Audio Cassette</a> ❖ | <input type="checkbox"/> <a href="#">Other – specify</a> _____ ❖                  |
| <input type="checkbox"/> <a href="#">Video Cassette</a> ❖ |   |

COMMENT: An item might have more than one type of inclusion. If so, check all that apply. For example, a book might have a CD in a pocket and another pocket with the instructions for the CD. If the inclusions are sufficiently thick that they are damaging the book, make a note of this and keep it in mind when you complete Sections B & C. If you select “none,” no other responses can be selected.

**A.7. PAST PRESERVATION ACTIONS** [None evident](#)

- |   |  |
|---|--|
| <input type="checkbox"/> <a href="#">Rebound – Heckman</a>    | <input type="checkbox"/> <a href="#">Book Repair – in house</a>                            |
| <input type="checkbox"/> <a href="#">Rebound – Houchen</a>    | <input type="checkbox"/> <a href="#">Brittle book review – Boxed or archival photocopy</a> |
| <input type="checkbox"/> <a href="#">Rebound - Other</a>      | <input type="checkbox"/> <a href="#">Other – specify</a> _____ ❖                           |
| <input type="checkbox"/> <a href="#">Pam Bound – in house</a> |  |

COMMENT: Check all that apply. More than one preservation action may have been taken. For instance, it is possible that book was rebound and later needed minor repairs. However, if you select “none evident,” no other responses can be selected.

**B. What is item’s condition?****B.1. COVER CONDITION:**

- |  |  |
|--|--|
| <input type="checkbox"/> <a href="#">Good</a>                                | <input type="checkbox"/> <a href="#">Acidic (pam , paper)</a>    |
| <input type="checkbox"/> <a href="#">Spine loose, detached, or damaged</a> ❖ | <input type="checkbox"/> <a href="#">Damage from light</a> ❖     |
| <input type="checkbox"/> <a href="#">Boards loose or detached</a> ❖          | <input type="checkbox"/> <a href="#">Bug damage</a>              |
| <input type="checkbox"/> <a href="#">Worn</a>                                | <input type="checkbox"/> <a href="#">Animal damage</a>           |
| <input type="checkbox"/> <a href="#">Dirty</a>                               | <input type="checkbox"/> <a href="#">Mold</a> ❖                  |
|  | <input type="checkbox"/> <a href="#">Water damaged</a>           |
|  | <input type="checkbox"/> <a href="#">Other – specify</a> _____ ❖ |

COMMENT: Check all that apply. However, if you select “good,” no other condition can be selected.

**B.2. PROTECTIVE COVER OR ENCLOSURE CONDITION:**

- [NONE](#)
- [Good](#)
- [Acidic](#) ❖
- [Damaged](#)
- [Bad fit](#) ❖
- [Other – specify \\_\\_\\_\\_\\_](#) ❖

COMMENT: Check all that apply. However, if you select “none” or “good,” no other condition can be selected.

NOTE: If there is no protective cover or enclosure, check “none.”

**B.3. PAPER FLEXIBILITY (pick one):**

- [Paper flexible and in good condition](#)
- [Paper nearly brittle](#)
- [Paper too brittle for commercial binding](#) ❖

COMMENT: Check only one box.

**B.4. LEAF (page) ATTACHMENT (pick one):**

- [Intact](#)
- [Pages loose or detached](#) ❖
- [Pages missing](#) ❖

COMMENT: Check only one box.

**B.5. TEXT BLOCK CONDITION:**

- |   |   |
|---|---|
| Margins (pick one):   | Text Block attachment (pick one):   |
| <input type="checkbox"/> <a href="#">Adequate to rebind</a>     | <input type="checkbox"/> <a href="#">Good</a>                               |
| <input type="checkbox"/> <a href="#">Inadequate to rebind</a> ❖ | <input type="checkbox"/> <a href="#">Shaken Hinges</a> ❖                    |
|   | <input type="checkbox"/> <a href="#">Broken text block (interior)</a> ❖     |
|   | <input type="checkbox"/> <a href="#">Broken hinge (pastedown/flyleaf)</a> ❖ |
|   | <input type="checkbox"/> <a href="#">Damaged hinge</a> ❖                    |
|   | <input type="checkbox"/> <a href="#">Other – specify _____</a> ❖            |

COMMENT: Check only one box to describe the margins. More than one response might be appropriate to describe the Text Block attachment, so you can check more than one. However, if you select “good,” the other conditions cannot be selected.

**B.6. PAGE CONDITION:**

- |   |  |
|---|--|
| <input type="checkbox"/> <a href="#">Good</a>                         | <input type="checkbox"/> <a href="#">Bug damage</a>              |
| <input type="checkbox"/> <a href="#">Pages – mild damage</a>          | <input type="checkbox"/> <a href="#">Animal damage</a>           |
| <input type="checkbox"/> <a href="#">Pages – heavy damage</a> ❖       | <input type="checkbox"/> <a href="#">Mold</a> ❖                  |
| <input type="checkbox"/> <a href="#">Pages mutilated or cut out</a> ❖ | <input type="checkbox"/> <a href="#">Foxing</a>                  |
| <input type="checkbox"/> <a href="#">Pages stuck together</a> ❖       | <input type="checkbox"/> <a href="#">Print burns</a>             |
| <input type="checkbox"/> <a href="#">Water damaged</a>                |  |
| <input type="checkbox"/> <a href="#">Pages Uncut</a> ❖                | <input type="checkbox"/> <a href="#">Other – specify _____</a> ❖ |

COMMENT: Check all that apply. However, if you select “good,” no other condition can be selected.

**B.7. ATTACHMENTS OR INCLUSIONS CONDITION:**

NONE

- [Good](#)
- [Damaged](#) ❖
- [Missing](#) ❖
- [Needs pocket](#) ❖
- [Other – specify](#) \_\_\_\_\_ ❖

COMMENT: Check all that apply. However, if you select “none” or “good,” no other condition can be selected.

NOTE: If there are no attachments or inclusions, check “none.”

**B.8. CAUSE(S) OF DAMAGE:**

[Not Applicable](#)

- [Library environment](#)
- [Patron](#)
- [Normal wear and tear](#)
- [Poor Design](#)
- [Previous preservation actions](#) (ours or others)
- [Processing damage:](#) TT BC Other
- [Other –specify](#) \_\_\_\_\_ ❖
- [Unknown](#)

COMMENT: Check all that apply. However, if you select “Not Applicable,” no other condition can be selected. NOTE: If you have not found any damage or wear (e.g. all conditions = “good” or “none,” then check “Not Applicable.”

## C. What needs to be done?

### [C. 1. Little to no damage.](#)

COMMENT: Check this box if little or no damage exists. As a rule, this “Little to no damage” is appropriate for items that have only minor damage, if any.

Review Section B for any conditions that require specific action (in red type) and click on ❖ for more information.

A book with the conditions listed below might still qualify for “Little to no damage” – depending on the other aspects of the book’s condition. Consider the overall condition before you select this option.

Attachments or Inclusions is “none” or “good”

Cover Condition is “good,” or “worn,” or shows “damage from light”

Leaf Attachment is “intact”

Page Condition is “good,” “mild damage,” “water damage” (if the damage is minor), or “foxing.”

Paper Flexibility is “flexible and in good condition.” If the Paper flexibility is “nearly brittle” and the book is otherwise sound (minor wear and tear) it qualifies for this option.

Protective Cover or Enclosure condition: “none” or “good.”

Text block Condition. If the Text Block attachment is “good,” you may select this option.

Text block Condition. Margin condition is not relevant when the book is otherwise sound. It may be a factor in your decision to select “Moderate Damage” or “Significant Damage” (below).

### C.2. Moderate damage – Action needed.

[Recase – new cover](#)

[Recase – use original cover](#)

[Rebind](#)

[Thermal bind](#)

[Pam bind](#)

[Level 1 Book Repair \(see list\)](#)

[Level 2 Book Repair \(see list\)](#)

COMMENT: Check all of the actions that might be appropriate. E.g. it is possible to check Pam bind and/or a Book Repair option. Some options are mutually exclusive: Pam Bind cannot be combined with Recase or Thermal Bind, probably not with Rebind. Level 1 Book Repair cannot be combined with Level 2 Book Repair.

NOTE: Moderate Damage can be selected only if paper is flexible. REFER ALL BRITTLE BOOKS AND ALL NEARLY BRITTLE BOOKS THAT ARE DAMAGED for secondary review.

Review Section B for any conditions that require specific action (in red type) and click on ❖ for more information.

Types of book repairs that can be included as moderate damage:

- Level 1 Book Repair (15 minutes or less):
  - [Page repair](#) (up to 10 pages)

- Tip-in (up to 5 non-contiguous pages)
- Hinge mend glue front and/or back hinges. (this is Level 2 if the hinges also need tape)
- Hinge mend tape front and/or back hinges. (this is Level 2 if the hinges also need glue)
- Spine repair - with tape
- Clean cover
- Make or attach pocket for inclusion(s)
- Erase a few pages of pencil marking,
- Remove a few post-its
- Cut open a few uncut pages
- Level 2 Book Repair (More than 15 minutes but less than 2 hours):
  - 2 or more Level 1 repairs on the same item. (does not refer to Hinge mend with glue or tape – if both front and back need repair, it is still a level 1 repair.)
  - Page repair (10 pages or more)
  - Page replacement, replace inclusion, missing pages, or mutilated pages (involves Inter-Library Loan, photocopying and trimming replacement pages)
  - Tip-in (6 to 10 non- contiguous pages)
  - Hinge mend (needs both tape and glue)
  - Other mends that will take 16 minutes to 2 hours.
    - erasing many pages of pencil marking
    - cutting open all uncut pages in a large book
    - removing a kazillion post-its

C.3. Significant damage – Repair or advanced preservation action needed. **Refer for Secondary Review.**

Significant damage - Refer the following Items for secondary review:

- ALL BRITTLE BOOKS
- ALL NEARLY BRITTLE BOOKS WITH “MODERATE” DAMAGE OR MORE SERIOUS DAMAGE.
- ALL BOOKS THAT NEED REPAIRS NOT INCLUDED IN THE LIST OF “MODERATE” DAMAGE (ABOVE).
- Review Section B for any conditions that require specific action (in red type) and click on ❖ for more information. Some conditions will require that that the book be referred for Secondary Review.

**C. 4. Secondary Review Result(s)**

- |                          |                             |                          |                             |
|--------------------------|-----------------------------|--------------------------|-----------------------------|
| <input type="checkbox"/> | Level 1 Book Repair         | <input type="checkbox"/> | Brittle/unbindable Analysis |
| <input type="checkbox"/> | Level 2 Book Repair         | <input type="checkbox"/> | Spec. Coll. or Archives?    |
| <input type="checkbox"/> | Level 3 Book Repair         | <input type="checkbox"/> | Conservator                 |
| <input type="checkbox"/> | Recase – new cover          | <input type="checkbox"/> | Replace (mass paperback)    |
| <input type="checkbox"/> | Recase – use original cover | <input type="checkbox"/> | W/D – not conservable       |
| <input type="checkbox"/> | Rebind                      | <input type="checkbox"/> | Other – specify _____       |
| <input type="checkbox"/> | Thermal bind                |                          |                             |
| <input type="checkbox"/> | Pam bind                    |                          |                             |

Secondary Review will be completed by Preservation staff.

**D. Notes or comments.**

Use this space to write down any comments or questions.  
This is a good spot to record anything that strikes  
you as unusual about the book you are assessing.