

[Accepted terms  
summary](#)

## 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 require a specific action under part C. What Needs to Be Done. Others require more information. These are displayed in **Red type**. Click on the [symbol \(v\)](#) 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
- .. Damaged by poor shelving
- .. Poorly shelved – no direct damage

**COMMENT: Items with shelving problems will contain a Shelving Problems form. Items with extraneous paper/items might contain a Shelving Problems item.**

**Year Published**

**COMMENT: Enter the year of publication for all items – monographs, serials, other**

Accepted terms  
summary

## A. What is it? General Description.

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

- Book
- Pamphlet (single signature)
- Unbound paper
- 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"/> Rigid Board – cloth   | <input type="checkbox"/> Econo-bind or Lamijack  |
| <input type="checkbox"/> Rigid Board – paper   | <input type="checkbox"/> Pam bound               |
| <input type="checkbox"/> Rigid Board - buckram | <input type="checkbox"/> Thermal Bound           |
| <input type="checkbox"/> Rigid Board – Leather | <input type="checkbox"/> N/A-unbound             |
| <input type="checkbox"/> Paperback             | <input type="checkbox"/> Other – specify _____ ❖ |
|                                                | <input type="checkbox"/> Special Cover           |

**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**. **EXCEPTION:** Side-stapled items rebound with old “pam board” (marbled greenish or brown pattern with cloth or light buckram spine cover). These are classed as paper, not buckram or cloth.

**A.3. ADDITIONAL PROTECTIVE COVERING:** NONE

- Box – paper board
- Box – rigid board w/buckram
- Slip case
- Portfolio W/flaps
- Portfolio - flapless

- Dust Cover
- Local box - manila
- Special Enclosure

 Other – specify \_\_\_\_\_ ❖

**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.

**A.4. TYPE OF PAPER (pick one):**

- Acidic – Non-coated paper
- Non-acidic – Non-coated paper
- Coated
- Newspaper
- Onion skin

- Multiple paper types – acidic (describe) ❖
- Multiple paper types – none acidic (describe) ❖
- Other – specify \_\_\_\_\_ ❖

**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>	
Adhesive - <input type="checkbox"/> Double fan adhesive <input type="checkbox"/> Other - adhesive Sewn - <input type="checkbox"/> Signature -STF <input type="checkbox"/> Other – sewn <input type="checkbox"/> Side Stapled <input type="checkbox"/> Spiral bound	<input type="checkbox"/> Loose-leaf notebook <input type="checkbox"/> Pam bound - Stapled or sewn <input type="checkbox"/> Pam bound - Taped/glued <input type="checkbox"/> Unbound pages <input type="checkbox"/> Other – specify _____ ❖

**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.

**NOTE:** Be particularly careful with pamphlets. The presence of staples does not automatically mean it is “Pam bound – Stapled or sewn.” That term applies only when staples or thread are the primary or only method of attaching the pamphlet to the binder. Click [here](#) to see the definitions for different pam bindings.

<b>A.6. ATTACHMENTS OR INCLUSIONS</b>	
<input type="checkbox"/> NONE	
<input type="checkbox"/> Paper item(s) <input type="checkbox"/> CD or DVD ❖ <input type="checkbox"/> Diskette ❖ <input type="checkbox"/> Audio Cassette ❖ <input type="checkbox"/> Video Cassette ❖	<input type="checkbox"/> Foldouts, centerfolds <input type="checkbox"/> Photos or illustrations (glued or taped) <input type="checkbox"/> Special Endsheets <input type="checkbox"/> Other – specify _____ ❖

**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

- Rebound – Heckman
- Rebound – Houchen
- Rebound - Other
- Pam Bound – in house

- Book Repair – in house
- Brittle book review – Boxed or archival photocopy
- Other – specify \_\_\_\_\_ ❖

**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.**

Accepted terms  
summary

## B. What is item's condition?

### B.1. COVER CONDITION:

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

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

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

NONE

- |                                                  |
|--------------------------------------------------|
| <input type="checkbox"/> Good                    |
| <input type="checkbox"/> Acidic ❖                |
| <input type="checkbox"/> Damaged                 |
| <input type="checkbox"/> Bad fit ❖               |
| <input type="checkbox"/> 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):

- |                                                                     |
|---------------------------------------------------------------------|
| <input type="checkbox"/> Paper flexible and in good condition       |
| <input type="checkbox"/> Paper nearly brittle                       |
| <input type="checkbox"/> Paper too brittle for commercial binding ❖ |

**COMMENT:** Check only one box.

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

- |                                                    |                                            |
|----------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Intact                    | <input type="checkbox"/> Unbound-intact    |
| <input type="checkbox"/> Pages loose or detached ❖ | <input type="checkbox"/> Unbound-missing ❖ |
| <input type="checkbox"/> Pages missing ❖           |                                            |

**COMMENT: Check only one box.**

**This question refers to the effectiveness of the method of leaf attachment or the quality of workmanship involved. If pages are loose or missing because of patron actions (mutilation, torn out) but pages are otherwise still attached to the text block, then select “intact” and record the mutilation under page condition.**

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

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

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

**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 original design or workmanship
- Previous preservation actions (ours or others)  Size
- 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.”

[Accepted terms  
summary](#)

## 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 the ✓ 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.

<a href="#">Thermal bind</a>	STAFF:
<a href="#">Pam bind</a>	<a href="#">Recase – new cover</a>
<a href="#">Level 1 Book Repair (see list)</a>	<a href="#">Recase – use original cover</a>
<a href="#">Level 2 Book Repair (see list)</a>	<a href="#">Rebind</a>

**COMMENTS:**

1. Check all of the actions in the left-hand column that might be appropriate. E.g. it is possible to check Pam bind and/or a Book Repair option.
2. Some options are mutually exclusive: Pam Bind cannot be combined with Thermal Bind. Level 1 Book Repair cannot be combined with Level 2 Book Repair.
3. STAFF will complete the Recase/Rebind column.

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

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

§ Thermal bind – select this if the item already is thermal bound and the binding is significantly damaged (broken text block, stuff falling out, and so on). It might also be an option for loose leaf/unbound items that are in good condition and less than 2 inches thick.

§ Pam bind – select this if the item is not pam bound at all or if it already is pam bound and the binding is significantly damaged (text block is loose, staples coming out, thread is broken, hinges are damaged, adhesive is dried out on pam bound with tape items, and so on.)

§ 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
- Mend 1 text block break

- 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 books that only need 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. Page replacement involves Inter-Library Loan, photocopying and trimming replacement pages. It also includes tip-ins – see below. If there are more than 10 pages with color or illustrations OR more than 20 text only pages to be replaced, the item should be C.3. Significant Damage - Referred.
- 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.
  - Mend 2-3 text block breaks (but if the threads are broken as well, refer the item.)
  - erasing many pages of pencil marking
  - cutting open all uncut pages in a large book
  - removing a kazillion post-its

### C.3. Refer for Secondary Review.

**COMMENT: If you select this option, you must also start the REFERRED PAPER BASED ITEMS form (SF1-referred) and keep it with the item. Staff will complete the rest of the form.**

#### When should something be referred (C..3.)?

© Refer all brittle items

© Refer all flexible or nearly brittle items with significant damage – advanced repair or preservation actions needed. E.g., when Book repairs add up to 3 (including flexible). For instance, shaken hinges (level 1) plus broken text block (level 1) plus damaged spine (level 1), the levels add up to 3 and the item becomes a referral.

© Refer all books that need repairs not included in the list of “moderate” damage (above).

© Refer any item that, in your opinion needs to be seen by staff. It might qualify as C.2 – but it’s a little too cheesy, fragile, etc. When in doubt, refer it.. We can always change it back to a C.2.

© 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.

[Accepted terms  
summary](#)

**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.**