A. Staffing and Oversight (20 points total)
1. Is staffing sufficient for adequate processing and preservation of materials? (0-5 points) ____
2. Is there a designated archivist, whether the designee is part-time or full-time? (0-5 points) ____
3. Has the designated archivist been trained to deal with archival material? or Does the designated archivist have access to someone with that training? (0-5 points) ____
4. Is there a committee whose terms of reference include archives and records management? (0-3 points) ____
5. Does the committee receive reports on the archives at least annually? (0-2 points) ____

Section score: _______/20

B. Physical Locations and Preservation (95 points total)
1. Is the storage space safe to use? Yes ________ No _________
   To get a Yes – Must have 80% of following questions to receive any points from this subsection:
   a. Is the storage space well-maintained? (0-5 points) ____
   b. Is the storage space well-lit? (0-5 points) ____
   c. Are shelving units stable? (0-10 points) ____
   d. Are there metal ladders or stepladders, commensurate to the shelving, available to allow access to high areas? (0-5 points) ____

B1 subsection score: _______/25

2. Does the physical location(s) allow for materials to be preserved? Yes ________ No _________
   To get a Yes – Must have 80% of following questions to receive any points from this subsection:
   a. Can access to the storage space be controlled? (0-10 points) ____
   b. Is the storage space dry and watertight? (0-10 points) ____
   c. Have measures been taken to prevent and protect against leaks? (0-5 points) ____
   d. Have measures been taken to prevent and extinguish fires? (0-5 points) ____
   e. Have measures been taken to control termites, mice, and other pests? (0-5 points) ____

B2 subsection score: _______/35

3. Are there adequate and appropriate measures to control the level of humidity in the physical location? (0-10 points) ____

4. Is the storage space easily and rapidly accessible? (0-5 points) ____

5. Is the storage space adequate for foreseen needs? (0-5 points) ____

6. Does the storage space allow for expansion of holdings? (0-5 points) ____

7. Is there a good working relationship between the records center and the institutional IT department? (0-5 points) ____

8. If electronic records are kept, are the records stored on a local server or on other denominational servers, rather than in the cloud? (0-5 points) ____

B3-8 subsection score: _______ /35

Section score: _______/95
C. Policies (57 points total)

1. Are there policies governing access to the material? Yes ____ No ____
   
   **To get a Yes** – Must have 60% of following questions to receive any points in this subsection:
   
   a. Are there policies related to external researchers? (0-2 points) ____
   b. Is there an application to conduct research? (0-2 points) ____
   c. Is there a researcher’s agreement? (0-2 points) ____
   d. Is there a researcher’s code of conduct? (0-2 points) ____

   **C1 subsection score:** _______/8

2. Are vital records (refer to WP BA 70 15) secure? (0-5 points) ____

3. Are there policies dealing with restrictions of material? (0-5 points) ____

4. Do policies provide for continuing and expanding access to the material? (0-5 points) ____

5. Is there an appropriate collection management policy? (0-5 points) ____

6. Are there appropriate disaster policies and plans? (0-5 points) ____

7. Is there a long-term archival preservation policy? (0-5 points) ____
   a. Are electronic records included in the long-term archival preservation policy? (0-5 points) ____

   **C2-6 subsection score:** _______/35

8. Is there an established policy for creating Memoranda of Understanding with potential partners and/or donors? Yes _____ No ______
   
   **To get a Yes** – Must have 60% of following questions to receive any points in this subsection:
   
   a. Does the policy address what can trigger the return of an item? (0-3 points) ____
   b. Does the policy address the conditions of preservation for an item? (0-3 points) ____
   c. Does the policy address potential restrictions on access to an item? (0-3 points) ____

   **C7 subsection score:** _______/9

9. Do the policies fit with the wider goals of the parent institution? (0-8 points) ____

   **C8 subsection score:** _______/8

   **Section score:** _______/60
Evaluators’ Score Sheet – Archives - Approved

A section score: _____/20
B section score: _____/95
C section score: _____/60
Total score: ______/175

Things for Evaluators to Remember

- Applicant must achieve an overall minimum of 60% to achieve approved status (minimum of 105 points)
- Questions are scored along a range of points, which means that partial points are possible
- If the applicant does not hold electronic records, sections related to those records are optional
- If A2 has a score of zero points, applicant is not eligible to achieve approved status until archivist has been designated
- If A4 has a score of zero points, applicant is not eligible to achieve approved status until committee whose terms of reference include archives and records management is created
- If either B1 or B2 have a score of less than 80%, applicant is not eligible to achieve approved status until issues are corrected
- If either C1 or C7 have a score of less than 60%, applicant is not eligible to achieve approved status until those policies are created
- If Section C has an overall section score of less than 60%, applicant is not eligible to achieve approved status until those policies are created

Recommendation for status: _________________________________