



# *Collections Research News*

Winter 2006/2007



## **Elements of Successful Collections Management**

There are nine major elements of successful collections management in museums and all of these elements should be present to insure your museum is fulfilling its public trust and collection stewardship obligations. These key elements are:

- ✓ Clear Museum Mission Statement
- ✓ Mission-driven Policies and Procedures
- ✓ Knowledge of proper handling procedures
- ✓ Thorough and accurate documentation of collections
- ✓ Knowledge of safe and proper numbering methods
- ✓ Inventory control
- ✓ Safe and stable environment
- ✓ Consistent and sound access procedures
- ✓ Safe and secure exhibition practices

*Collections Research News* has addressed some of these key elements in previous editions, but perhaps it is time to revisit them. Starting at the beginning with the first two elements—the mission statement and mission driven policies and procedures.

### ❖ **Clear Museum Mission Statement**

The Mission Statement is the heart of the museum and is the most important document that the museum writes. The mission creates a sense of purpose for the museum. It outlines who the museum is and its goals, values and vision. It is the basis for defining the collections and services of the museum. The entire staff from the director to the janitor(s), the volunteers, and the trustees/board of directors should be familiar with the museum's mission and it should be posted or otherwise made available to the museum's donors and visitors. The mission of the museum should inspire and guide the museum, its trustees, staff and volunteers on a daily basis and is the backbone on which the rest of the museum's policies and procedures are built.

### ❖ **Mission-driven Policies and Procedures**

There are three major policies relating to the creation and management of the museum's collections. These are the Collection Policy, the Acquisition Policy and the Collection Access Policy. Many times these are written into a single document, but we will address them separately here to give the reader a better understanding of the differences between them.

#### ***Collection Policy***

The Collection Policy outlines what it is the museum will collect based on the Mission Statement. While the mission statement has given the museum purpose, the collection policy gives structure to the museum's collection, be it objects, documents, photographs, live animals or plants or demonstration/hands-on materials for illustration of particular themes. It includes time period and type of materials. Are these materials relevant to the story you are trying to tell?

The Collection Policy outlines how the collection will be handled within the museum. Will the museum create different types of collections such as permanent; educational, or research, or will everything be incorporated into one collection?

The Collection Policy outlines donor's rights with regard to restrictions on use or disposal and appraisal of donations. The museum needs to lay out in policy what types of restrictions it will accept should a donor request that their material be handled in a particular way. For example, if a donor wants to give the museum a collection of documents but is unwilling to allow these materials to be accessed and used, does the museum really want to acquire such a collection? As part of our public trust responsibilities, we want to preserve important objects or documents, but they are of no use if the public gains no benefit from seeing or learning about them. By the same token, there may come a time when an object will need to be removed from a museum's collection (see below). The museum needs to have the

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flexibility to do what is necessary and not have its hands tied by a restriction that states the museum will "never, ever dispose of my 'whatsit'".

The third major area regarding donor rights is appraisals. Museums need to outline their role in this area. As a general rule a museum should never appraise or pay for an appraisal for any donation offered it. To do so creates an appearance, if not a fact, of conflict of interest. Therefore, a statement to the effect that the museum will not appraise donations and that if the donor wishes to have an appraisal for tax purposes, it is the donor's responsibility alone should be included.

Alluded to in the previous section, the Collection Policy outlines requirements for removing artifacts from the collection, if necessary. Typical reasons for materials being removed from a museum's collection include the object no longer fits the museum's mission; the object has deteriorated beyond usefulness; or the object is subject to repatriation under NAGPRA (the Native American Graves Protection and Repatriation Act). How does it happen that an object in the museum's collection no longer fits the museum's mission? This happens quite frequently when a museum does not start out life with a clear mission statement or the mission began very broadly and over time evolved in a more focused direction. It can also happen when materials are accepted into a collection for 'political purposes,' that is, to appease a donor who has something the museum REALLY wants, but is only willing to give that item if you take these other things too. Sometimes these 'political items' can be deflected by having a strong mission statement, explaining it to the donor, and suggesting more appropriate homes for them.

There are appropriate and not so appropriate ways of removing material from the museum's collection. Museum ethics demand that any time an artifact is deaccessioned, the entire process be transparent and above board. Ethical disposal methods include transferring the item to a more appropriate museum; if the item is truly deteriorated beyond usefulness, actual disposal of the item; or sale at public auction. No staff member, volunteer or trustee/board member should be the recipient of a deaccessioned item. All of this needs to be included in the museum's policy, usually under a section titled Deaccessioning.

The Collection Policy also addresses incoming and outgoing loans. Who will the museum loan collection objects to? Who will they borrow from? How long or short a loan can be and how will it be maintained?

### Acquisition policy

While the Collection Policy outlined *what* the museum will collect, the Acquisition Policy outlines *how* the museum will acquire materials for the collection. This may be through gifts/donations, bequests, purchases, or repository arrangements (these items are not strictly 'yours' and belong to the entity with whom you have made the arrangement).

It outlines what are the required steps for acceptance or refusal of a potential donation. Who says 'yes' and who says 'no' and how will that be conveyed?

The Acquisition Policy also outlines what documentation is required for each artifact accepted into the collection. Standard documentation includes Deeds of Gift/Transfers of Ownership for donations and gifts; Bills of sale for purchases; a copy of the will for bequests; and Transmittal documents for other arrangements.

### Collection Access Policy

This section can actually be included in the body of the Collection Policy, but many times it is not written anywhere. A Collection Access Policy outlines who has access to the collection storage areas, along with how and when access will be granted. So, who has access? Will it be everybody and his brother or only collection staff? How and when: can anyone walk in the door and demand immediate access to the collection or is there a protocol to follow—x number of days lead time/must make an appointment, etc.?

The Collection Access Policy should also address access to locked exhibit cases or secured exhibit areas. Who will have control of the exhibit case or area keys and alarms? Will you be giving keys to the cleaning crew or just collection staff?

All these written policy statements must be supported by written procedures listing the steps to be taken and the forms to be used to properly implement the policy. If it isn't in writing, it does not exist. Both the policy and the corresponding procedures must be adhered to and should be implemented without exception.

Having a strong mission statement that is widely circulated and written policies and procedures that are based upon and support the mission statement allows your museum to not only uphold its public trust and stewardship obligations, but also to tell its story with a clear and uncomplicated voice.

The remaining elements will be addressed in subsequent issues. Stay Tuned!

## 2007 TRAINING SCHEDULES

### ONLINE TRAINING

MS103: Basics of Museum Registration  
February 25 to March 24, 2007

MS207: Collections Management: Cataloging Your Collection  
July 1 to 31, 2007

MS007: The Mission Statement: Is It Really That Important?  
July 11, 2007

### WESTEND TRAINING CENTER

Collections Management in Times of Change  
November 26 to 30, 2007  
February 25 to 29, 2008

Check our website for details:  
<http://museumcollectionmgmt.com>

## SERVICES

### FILEMAKER® PRO CATALOGING TEMPLATES

*Collections Research for Museums can assist small museums with computerizing their collection documentation using off-the-shelf database software.*

*Training is available for our database and in general FileMaker Pro techniques.*

### ON-SITE TRAINING

*Collections Research for Museums offers classes for small museums in Cataloging and Collections Management. The course is designed for those museums which have small, non-professionally trained or volunteer staffs. It covers the basics of marking, handling, measuring, and cataloging, plus general care and storage for all types of objects and materials.*

### PROJECT SERVICES

*We also offer a variety of other services to museums, large and small. These range from simple inventories to complete and thorough cataloging of collections. Feel free to contact us for more information. We provide a free initial consultation.*

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*Questions, comments or story suggestions are always welcome.)*

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