



# Collections Research News

Fall 2010



## Elements of Successful Collections Management

### Part 7

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* addressed the first five elements in previous issues. In this issue we will look at the importance of inventory control in museums.

### ❖ The Importance of Periodic Inventories

What IS so important about doing that inventory of the collection? Why should you put other duties aside and perform this unglamorous task? For one thing, how can you successfully perform all those glamorous tasks, such as exhibits and public programs, if you do not know what you have in your collection? Secondly, how do you know that wonderful 'whatzit' is still where it was the last time you saw it 10 years ago? Is it even still in the museum? By the way, what is that pile of dust sitting in the place where that lovely black silk hat used to be?

Perhaps you can see where this is going. Periodic inventories of your collections are critical to fulfilling your stewardship obligations as a repository of public trust. 'Visiting' with your collections will remind you of the wonderful things you have in the museum and may spark a new idea or two about how to improve or change your exhibitions or public/educational programs. It will also allow you to monitor your collections for condition and stability, telling you that a change may be needed in the storage/exhibition environment, that the method of housing a particular artifact needs to be improved or changed, or that no changes at all are needed. Periodic inventories also play a large part in the security of the museum and its collections. If you never look in that storeroom, how will you ever know if something is missing and, if it is missing, was it stolen or just misplaced? A misplaced artifact is as good as stolen for all practical purposes.

Now that I know why I should be doing an inventory, how do I do it? Inventories, in fact, are not hard to do, but you must be systematic in how you go about it and always finish what you start. Begin with one section of one room and start at the top and work down (or the bottom and work up, if you prefer). Each room, section, shelf or drawer should be assigned a location name or number (ex. Storeroom 1, Shelving Unit [or Cabinet] 1, Shelf [or Drawer] 1). With both the numbering and the inventory, begin at a logical point in the room and proceed in a logical pattern around the room (ex. left to right, right to left or row by row, etc.). You may find that some of the artifacts you come across do not have numbers on them. They have either deaccessioned themselves (numbers wore or fell off) on the shelf or were missed during the accessioning process. For these items it is a good idea to establish a temporary numbering system with which to track them (ex. T1, T2, T3.....T100, etc.). Attach an acid-free tag to each unnumbered item with the temporary number written on it so you can find it again when it comes time to reconcile the inventory with the museum's records. Keep a temporary number log, similar to your accession number log, to track the numbers you are assigning.

The information we are looking for during the inventory is the Accession number (or temporary number, if necessary),

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the type of artifact (its name, ex. spoon, photograph, etc), a short description (describe it so you can tell it apart from some other similar artifact in the collection), and the artifact's condition (assuming everything is 'Good' unless circumstances dictate otherwise reduces writing time). It can be helpful to leave a spot on your paper/form for comments just in case there are some major conservation concerns that should be addressed. Write the inventory location (room, shelving unit, shelf) at the top of each page and include the date and the name of the person doing the inventory. Each distinct location will be listed on separate sheet or sheets—new location, new sheet.

You are now ready to begin your inventory.

**❖ Reconciling an Inventory**

Following the process above we have systematically gone through our storage and exhibition spaces and made lists of all the items in our collection. Now what do we do with all those pieces of paper we generated? That is the second phase of the inventory process—the reconciliation. This reconciliation phase cannot take place until an inventory of the entire collection has been completed.

The first part of the reconciliation is relatively simple whether you are using a manual or computer catalog. Since the inventory sheets include the accession number and a short description of the artifact, go through the inventory sheets and update the catalog records with the current location of each artifact. Simple, right? Sure it is, IF all the artifacts are numbered AND all the numbers and descriptions match the catalog records AND all the catalog records are present and accounted for! Unfortunately, most of us will find that we don't have perfect records and some of our artifacts are not numbered or have deaccessioned themselves on the shelf or there is some other problem that crops up. We find that when we did our inventory we had to assign quite a few temporary numbers or when we go through the inventory sheets to update the records we find that some of the numbers do not match any existing catalog record. Now what?!

During the reconciliation process you will find that you have three categories of 'problems'. First, artifacts with seemingly correct accession numbers have no corresponding catalog record or the catalog record that does not match. Second are the artifacts with no numbers which were

assigned temporary numbers during the inventory. Third, there are left over catalog records for which you found no corresponding artifact. The solution: The artifacts in first two categories need to be matched up with the records in the third. Computerized records can make this task easier, but do not forget to check your manual records too. They can hold valuable information that will assist with this matching. Start with the first item. It is a blue widget with red dots. Pull up on the computer or from your object catalog all the records for widgets, concentrating on the records that have not yet been matched to an artifact. Look for the record that represents a blue widget with red dots. Hopefully you will only have one such record. If not, look at the size, shape, condition or other distinguishing characteristics to match the widget to the correct record. You may need to physically compare all your widgets to the catalog records to be sure of the match. When the correct record for the widget has been found, update the catalog record with its current location and, if necessary, number or re-number the widget with the correct accession number. Continue this matching process until you either run out of artifacts or catalog records.

If you find you have more artifacts than records, a more thorough search of your donor, accession or other records may be in order. If you find the records for the artifact, process it now by assigning an appropriate accession number and add it to your collection catalog. If you find no records, process the artifact as "Found in Collection" either under its assigned temporary number or other appropriate accession number and add it to your collection catalog.

If you find you have more records than artifacts to match to them, then you may have some serious issues regarding the security of your collection. The records may reflect artifacts that have been lost, stolen or removed from the collection without the proper paper trail being generated. A serious reevaluation of the museum's procedures should be undertaken.

Correcting discrepancies in the museum's paper trail, properly managing your collection and underscoring the importance of following procedures regarding handling and security of the collection are just a few of the reasons for conducting periodic inventories. The sooner you begin, the more comfortable you will feel about your stewardship of your collection.

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**2011 TRAINING SCHEDULES**

**ONLINE TRAINING**

MS103: Basics of Museum Registration  
February 22 to March 21, 2011

MS207: Collections Management: Cataloging Your Collection  
July 1 to 31, 2011

MS007: The Mission Statement: Is It Really That Important?  
July 18 to 22, 2011  
November 14 to 18, 2011

MS218: Collection Inventories  
November 7 to December 2, 2011

**WESTEND TRAINING CENTER**

Collections Management in Times of Change  
May 16-20, 2011

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

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**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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