



Balancing Access and Security in Museums, Libraries and Archives, Part 2



Museums must strike a balance between access and security when responding to patron requests. As institutions, we are in the business of protecting collections in perpetuity AND making them accessible to our audience through exhibitions and patron access. In Part 1 we talked about the Work Area and Granting Access. Part 2 will cover Who is granted access, the Purpose of the request, and Security.

3. Who will be allowed access

Determine WHO will be allowed these special privileges. The organization will need to determine if they will permit anyone to access the collection with or without a substantive reason, or if the policy should include a required purpose stated at the time of the request.

A patron with a stated project, an individual doing genealogy or family research, or a student working on an academic paper are all considered appropriate reasons for requesting access to collections. "Just wanting to see what you have" may not be an appropriate request and might be a "fishing expedition" for valuable items.

Visitors from out of town, who have not made advanced appointments, may need to complete a written research request form including contact information and specific questions pertaining directly to the request for access. With this information, staff can then research the request and get back in touch with the visitor to let them know if such materials are available, provide a list of those materials and a cost for copies of the materials. Copies of the materials can then be sent once payment has been received.

4. Know the purpose of the request

It is important to know the purpose of the access request. A written research request form is just one step in the entire **research request process**. A complete, pre-determined process should include:

- An application process that requests information on the research topic;
- List any and all materials the patron is looking for
- Identify what the patron wants or needs from the collection
- Identify what the final product of the research will be. Will it be a publication, an academic paper, for family research, or something else?
- Determine if the museum will need to request or will receive a copy of the research project for their records.

5. Security

Staff monitoring is an important security procedure to prevent damage or theft of materials. Staff should be able to see what the patron is doing at all times. No one should be allowed to access the collection on their own. Additionally, patrons should be issued a visitor badge which should be visible at all times while they are accessing the collection.

Be sure to review and obtain a signed acknowledgement of the access and handling rules prior to allowing the patron access to the collection. It is also advisable to require the patron to read and listen to verbal handling instructions - the dos and don'ts of handling museum objects and documents - and sign, acknowledging they have understood the instructions. These instructions should include the following:

- Clean hands or gloves are required and an explanation about when each is appropriate.
- The use of pencils only, no pens
- No food, drink or smoking in the work area.
- Proper handling of objects
- Proper handling of documents and the importance of keeping documents in order
- Proper handling of photographs; and
- Reviewing the list of items that are allowed or not allowed in the work area.

You will also need to create a sign-in sheet or patron log to track the types of uses for which the collections are accessed. This log should include the patron's name and contact information, the purpose of the research and the items requested and used, as well as the date and time of access.

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Make a copy of the patron's identification to attach to the log. Tracking which materials are used the most, or the least, will give the repository a better understanding for the level of processing or cataloging that might be appropriate for each of the materials. The log will also be invaluable should anything turn up missing or damaged, as it will aid in narrowing down who was the last person to access the material and when.

Staff should access and re-file all materials requested by patrons. One folder or one object at a time should be pulled by a staff person and presented to the patron for review. Staff should then instruct the patron they will only be allowed to view one set of records or object at a time. When each is returned, another set of records or another object will be brought out. With archival materials, emphasis should be placed on maintaining the order of the materials and instructions given for photocopy requests. The staff member will need to record and re-file, or store, the viewed material when the patron is finished.

Staff should always be present or at least within visual range of the patron during their use of the collection. If the patron is doing a side-by-side comparison of related or similar materials, a staff member should be present to assist with the handling of the items and to make sure no harm comes to them.

If requested, staff should make all photocopies. Provide slips of paper to be placed next to the item to be copied in the folder to mark that item for copying. The patron should be instructed NOT to remove any item from the folder, but simply mark it for the staff member to copy. Post-it notes should NEVER be used on any object or document! The item to be copied should only be removed and replaced by a staff person.

Continued in the next newsletter! Stay tuned for the final key components of collections access policies.

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MS267: Museum Ethics
Look for this course Summer 2020

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November 4 to 8, 2019

!NEW! SECURITY WORKSHOPS FOR TINY MUSEUMS

Collections Research for Museums now offering a half-day workshop titled "*Security for the Small Museum: Practical Low and No Cost Solutions*".

This workshop is designed for small museums with 10 or fewer staff (paid or unpaid) who are

looking to improve or learn about museum security. It will present practical tips that anyone can implement with little or no cost focusing on non-technical solutions.

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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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