

## Balancing Access and Security in Museums, Libraries and Archives, Part 3



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 covered who is granted access, the purpose of the request and security. Part 3 will cover the final components of a detailed *Collections Access Policy*.

### 6. Copy Requests

It is common practice to have a written policy that establishes whether there will be a cost to the patron for photocopies and digital formats for digitized collection items. These costs are usually by image or per CD or DVD. The permitted uses for photocopies and digital copies must be outlined in the policy. Actual costs should be stated in your facility's written procedures, as it is easier to change procedures than policy and actual costs may change over time.

The information on cost and uses of copies should be included in the information provided to the patron prior to accessing the collection.

Each institution must decide if cell phones can be used to photograph collection items, given consideration to copy right and use of such images once taken. Include cell phones in the allowed or not allowed section below.

### 7. Copyright and Publication Rules

Establish a policy statement regarding publication of the institution's materials which should include:

- Copyright
- Requesting and granting permission to publish
- Information on whether the institution will receive copies of the published work; and
- The credit line to be used to credit the institution for the material used, if applicable.

A copy of the Copyright Notice should be provided to the patron within the instruction packet. This notice should include a statement outlining how the institution reserves the right to refuse a copying order if it feels it would violate copyright.

Written permission to publish should be requested and can be granted only if the museum holds the copyright to the material requested. If the material is in the public domain and no longer protected under copyright, permission can be granted should the museum choose to do so.

Be sure your facility's policy and procedures outline the steps to be taken to verify the status of the copyright, what the museum will do if it does not hold the copyright, and proper steps for when the patron wants to use the material beyond what is appropriate for Fair Use under the statute.

If the museum does not hold the copyright, it is the patron's responsibility to obtain permission to use the material from the copyright holder. Be sure this is also stated in your policy. It is best practice to have a form for the patron to sign acknowledging this so it is clearly understood.

Additionally, obtain a copy of any publication where the collections are used. This will become part of the museum files.

Finally, be sure to include a section on the permissible and not permissible uses of museum materials. Is it ok for collection images to be reproduced on t-shirts, non-affiliated websites, coffee mugs, or other non-related items?

These seven components of the Researcher/Patron section of the *Collection Access Policy* will prepare the museum for any interaction with patron access requests. Implementation of the *Collection Access Policy* requires written procedures and forms. These forms and handouts should include:

- A Copy of the Access Policy,
- Research Request Form,
- Researcher/Patron Rules,
- Handling Rules, which should also be reinforced with verbal instruction,
- Copyright and publication rules
- Sign-in sheet, with a place for materials accessed, and
- Costs for providing copies of materials.

This policy must be applied consistently for everyone and all procedures must be followed each and every time a request

for access is made. No exceptions.

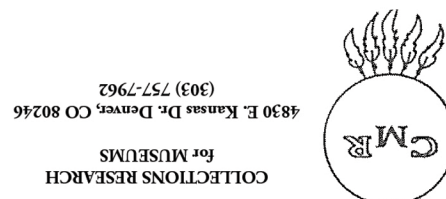
When creating Patron Rules, here are some suggestions to include.

- Patrons must sign in and give a short description of the purpose or topic of their research.
- Patrons are allowed to bring a notebook, pencils only, notebook computer without a case, and tape recorders into the work area.
- No backpacks, briefcases, computer cases, purses or coats will be allowed in the work area. These items must be checked at the reception desk or in provided lockers.
- No food, drink, smoking or vaping is permitted.
- Staff will access and re-file all materials requested by the patron.
- Materials will be accessed one file or object at a time.
- Patrons must maintain the documents in the same order in which they are found within each file.
- Photocopies of any materials requested by the patron will be made by museum staff. The item(s) to be photocopied will not be removed from the file without staff approval and a placeholder sheet will be placed in the file by the staff person while the copy is being made to ensure the document is returned to the proper location within the file.
- Patrons will be charged X amount per page for photocopies; and
- Include a statement regarding publishing permission, circumstances and copyright.

An effective *Collection Access Policy* allows a museum, archive, or library special collection to provide safe and secure access to their archival, photographic and object collections. Key points of the policy must be made available in writing to the institution's visitors. It is vital that all policy and procedures be followed consistently.

The burden of research is on the researcher, but staff must ensure the availability of the collection for the next patron to view. Remember; do not let yourself be distracted from supervising the patron and his or her work with the collection. It is your responsibility to keep the collection safe and complete.

REMEMBER US FOR  
CATALOGING/COLLECTIONS  
MGMT HELP OR TRAINING



## 2022 TRAINING SCHEDULES ONLINE TRAINING

MS103: Basics of Museum Registration  
January 3 - February 4, 2022

MS207: Collections Management: Cataloging  
Your Collection  
July 5 - August 1, 2022

MS267: Museum Ethics  
July 5 - August 1, 2022

MS218: Collection Inventories  
November 7 to December 2, 2022

MS007: The Mission Statement: Is It Really That  
Important?  
November 7 - 18, 2022

## !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.

**We are currently looking for institutions who would like to host one of these workshops**

Check our website or call us 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.

#### TRAINING ALSO AVAILABLE FOR PASTPERFECT MUSEUM COLLECTION'S MANAGEMENT SOFTWARE

See our website for more details or send us an email or give us a call.

### 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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