Juggling Balls and Other High Wire Acts:

How a Well-Crafted Collections Management Policy Can be the Safety Net that Saves Your Collections

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Our featured speaker …

Bruce MacLeish
Director of Collections for Newport Restoration Foundation

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Two Goals for Today…

1 - Elevate the Collections Management Policy from a perfunctory document to a practical one, one that is used by your organization to help support and defend difficult decisionmaking.

2 – Be ready to create a Temporary Deposit Form and use it within the next six months

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American Association for State and Local History
www.aaslh.org

Standards and Excellence Program for History Organizations
http://www.aaslh.org/steps.htm

Small Museums Committee and information on how to join the Small Museums List Serv
http://www.aaslh.org/SmallMuseums.htm

Small Museums Online Community
http://www.smallmuseumcommunity.org/
What We’ll Cover Today

- Policy vs. Procedure: What’s the Difference?
- A Collections Management Policy: Why Have One?
- Essential Elements of a Collections Management Policy
- Temporary Deposit Forms

A little about you….

RUNNING A MUSEUM IS HARD WORK

Like any good tool, it (a collections management policy) won’t work unless you use it!

Policy vs. Procedure: What’s the Difference?

Policies “provide the operational framework within which the institution and its efforts to achieve the institutional vision.” (SOU)

Procedures "are the operational processes required to...

Essential Elements of a Collections Management Policy

Statement of Purpose and Description of Collections

This is not only your mission statement but also includes a description of the museum’s collection and the goals the museum has for its collection.

Example: “The Henry Clay Memorial Foundation will maintain a permanent historical collection to accomplish its goal of presenting a historically accurate view of life at Ashland. The collection may be seen as having two parts: historical and interpretive. The historical collection will consist of objects and documents owned and used by Henry Clay and Clay family descendants who lived at Ashland. The interpretive collection will consist of objects not belonging to the Clay family but having historical significance in interpreting the life of Henry Clay, the Clay descendants and life at Ashland in the 19th and early 20th centuries.

**Remember to include a glossary of terms or define the museum terminology within the document.**

Essential Elements of a Collections Management Policy

Acquisition of Objects
- What will you accept and not accept? Buildings? Land?
- Forms used to process incoming collections

Deaccessioning
- What procedure do you follow? Who is authorized to deaccession?
- Where do objects go when deaccessioned?
- What are the criteria for deaccessioning?

Loans
- Incoming and outgoing: To whom do you loan? For what purposes?
- Do you loan to community organizations?
- Do you accept “permanent loans”?

Objects Placed in the Custody of the Museum
- Temporary Deposit Form (I’ll discuss this more in a few minutes)
- How do you cope with abandoned property? (we all have it, ‘fess up)

Records
- How do you maintain records for the collection?
- Maintaining records is a large part of the museum’s responsibility, museum trustees have been sued over failure to maintain proper records.

Insurance
- What type of policy do you carry for the museum collections?
- What is covered, what is not covered?
- How are incoming and outgoing loans treated?

Inventories
- How do you conduct your inventory (Annually? Every three or five years? On a rolling basis?)

Access to the Collections
- Who has access to the collections and under what circumstances?
- Is there a time limit or days of the week?
- Who must be present?
- Are photographs permitted?

Final Thoughts....
- Include the governing body’s date of approval
- Also include a version number and date (insert date with “version I” in the footer, for example)
Time for a few questions!

CASE #1
A college art museum in Virginia

The college forcibly removed four valuable paintings from its collection to finance general operating expenses of the college.

How could a Collections Management Policy have helped?

CASE #2
A museum in Washington, DC

Museum trustees borrowed objects for their own use.

How could a Collections Management Policy have helped?

CASE #3
A museum deaccessioned three paintings to which it did not have clear title.

How could a Collections Management Policy have helped?

Do you have …

TEMPORARY DEPOSIT FORMS (YES, YOU NEED ONE!)
And here’s 3 Reasons why

1. Legal Protection
2. Formal Documentation
3. Demonstrates Museum’s Commitment to Professionalism

GUIDE TO WRITING (OR REVISING) YOUR COLLECTIONS MANAGEMENT POLICY

Step #1: Information Gathering
Collect all of the information that you have about your collection—how many objects, how many are cataloged, do you have a teaching collection, is the collection well-cared for, do you have a separate line item in your budget for collections care, etc.

GUIDE TO WRITING (OR REVISING) YOUR COLLECTIONS MANAGEMENT POLICY

Step #2: Assemble a Task Force or Committee
Your Collections Management Policy Writing Committee should be composed of:
- Collections staff
- Chief administrator/executive director, etc.
- At least two board members
- An attorney (or at least have one available to review the last draft or two)

GUIDE TO WRITING (OR REVISING) YOUR COLLECTIONS MANAGEMENT POLICY

Step #3: Break Out the Work
What skills do your committee members have?
- Writing
- Research
- Ethics/Law

Inasmuch as possible, ask committee members to take up a task that will fit into their schedules and match their strengths and interests

GUIDE TO WRITING (OR REVISING) YOUR COLLECTIONS MANAGEMENT POLICY

Step #4: Take Out Your Calendars (or Blackberries)
- Think about using technology to ease the process of meeting and revising multiple versions of your documents
- Make a GANTT chart of tasks and timelines
Sample Gantt Chart

<table>
<thead>
<tr>
<th>Task</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
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</thead>
<tbody>
<tr>
<td>Committee Chair (Greta)</td>
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<td>Evaluating sample collection management policies from other museums</td>
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<td>Creating Google Docs account to share policies</td>
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<td>Accessibility and Documentation Sub-Committee (June &amp; Sue)</td>
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<tr>
<td>Participating in donor meetings to discuss accession problems in this area</td>
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<tr>
<td>Evaluating sample project</td>
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<tr>
<td>Evaluating current Standing Orders, Provisions, and Delegation Forms</td>
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<tr>
<td>Accessing &amp; Deaccessioning Section Sub-Committee (Sue, Jane, &amp; Ed)</td>
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<td>Accessing and Deaccessioning Section Sub-Committee (Sue, Jane, &amp; Ed)</td>
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<td>Contact former board members to discuss accession problems in this area</td>
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<td>Accessing and Deaccessioning Section Sub-Committee (Sue, Jane, &amp; Ed)</td>
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<tr>
<td>Contacting state museum association about laws pertaining to collections</td>
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<td>Accessing &amp; Deaccessioning Section Sub-Committee (Sue, Jane, &amp; Ed)</td>
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<tr>
<td>Evaluating current Deed of Gift, Temporary Deposit, and Cataloging Forms</td>
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<td>Evaluating and updating current Deed of Gift, Temporary Deposit, and Cataloging Forms</td>
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<tr>
<td>Loan Section Sub-Committee (Bob, Dan, &amp; Valerie)</td>
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<tr>
<td>Evaluating and updating the current incoming and outgoing loan forms</td>
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<td>Research information systems to keep track of loans</td>
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<td>Research &amp; Ethics (Paul &amp; Allison)</td>
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<tr>
<td>Work with Accessing &amp; Deaccessioning Sub-Committee on state laws</td>
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<tr>
<td>Insurance &amp; Ethics (Paul &amp; Allison)</td>
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<td>Creating insurance form for acquisition, storage, and loan</td>
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<td>Exploring ways to catalog the collection through online and off-the-shelf software</td>
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<tr>
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Put Your Policy to Work!

- Discuss with your board or ED about the need to create or revise your CMP
- If everyone agrees to move ahead, establish a committee and break the tasks out to sub-committees
- Take time to create a Temporary Deposit Form

Bruce MacLeish
bruce@newportrestoration.org

www.connectingtocollections.org