Collections Trust

An Introduction to Museum Documentation

South East Museum Development

@CollectionTrust

#CToutreach

#museumdocumentation

Supported by ARTS COUNCIL ENGLAND

Sarah Brown

Collections Trust

Outreach Officer

Supported by ARTS COUNCIL ENGLAND

Timetable

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10.15	Introductions and housekeeping
10.30	What is museum documentation and why is it important?
	Accountability and the SPECTRUM standard
	Object Entry, Acquisition, Cataloguing, Loans
12.30	Lunch
13.30	Location and Movement Control, Object Exit, Deaccession and Disposal
14.30	Choosing a CMS
15.30	Q&A / Discussion
16.00	Finish

Introductions

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CT website

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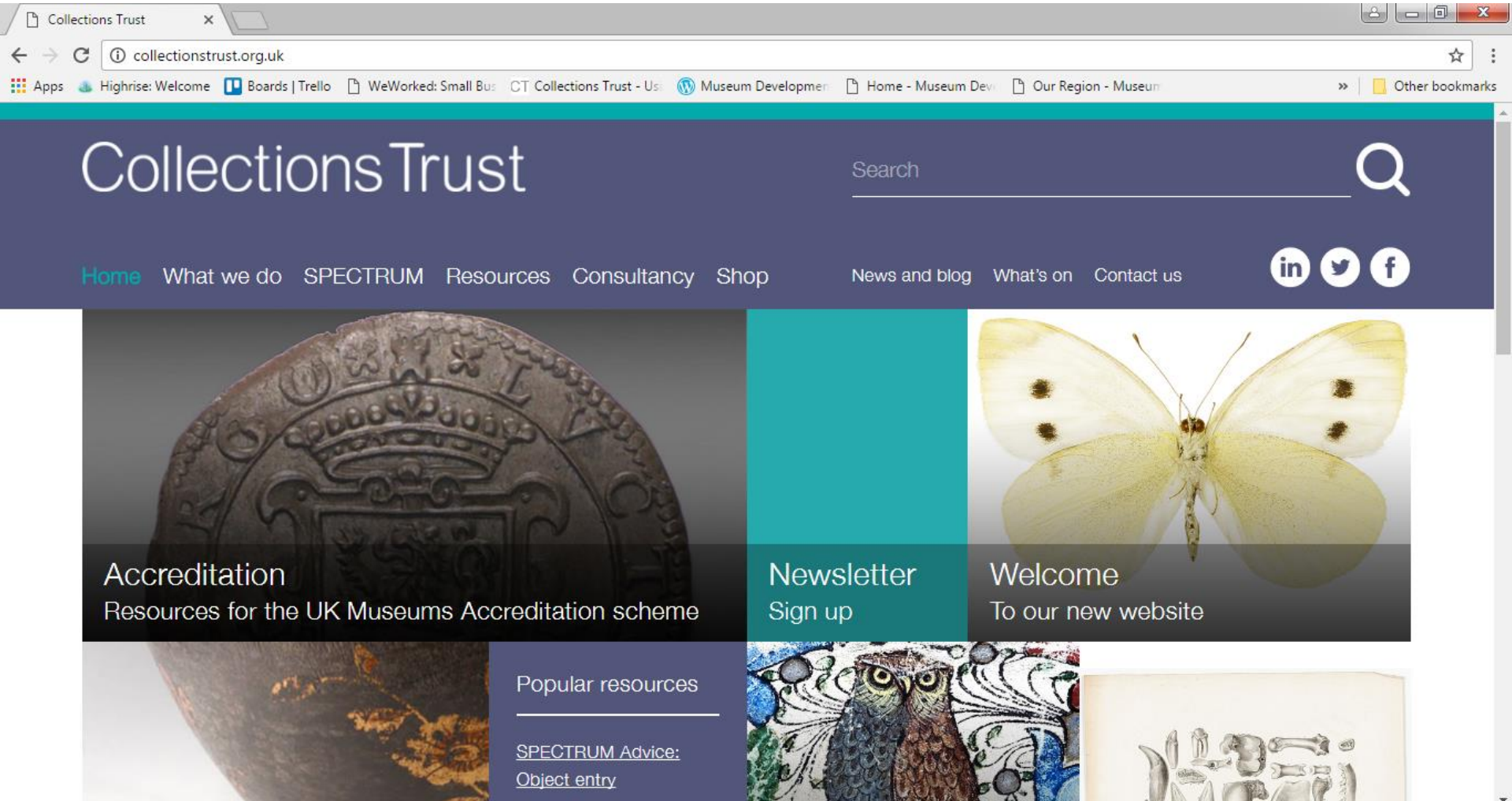
http://collectionstrust.org.uk/



What is Documentation?

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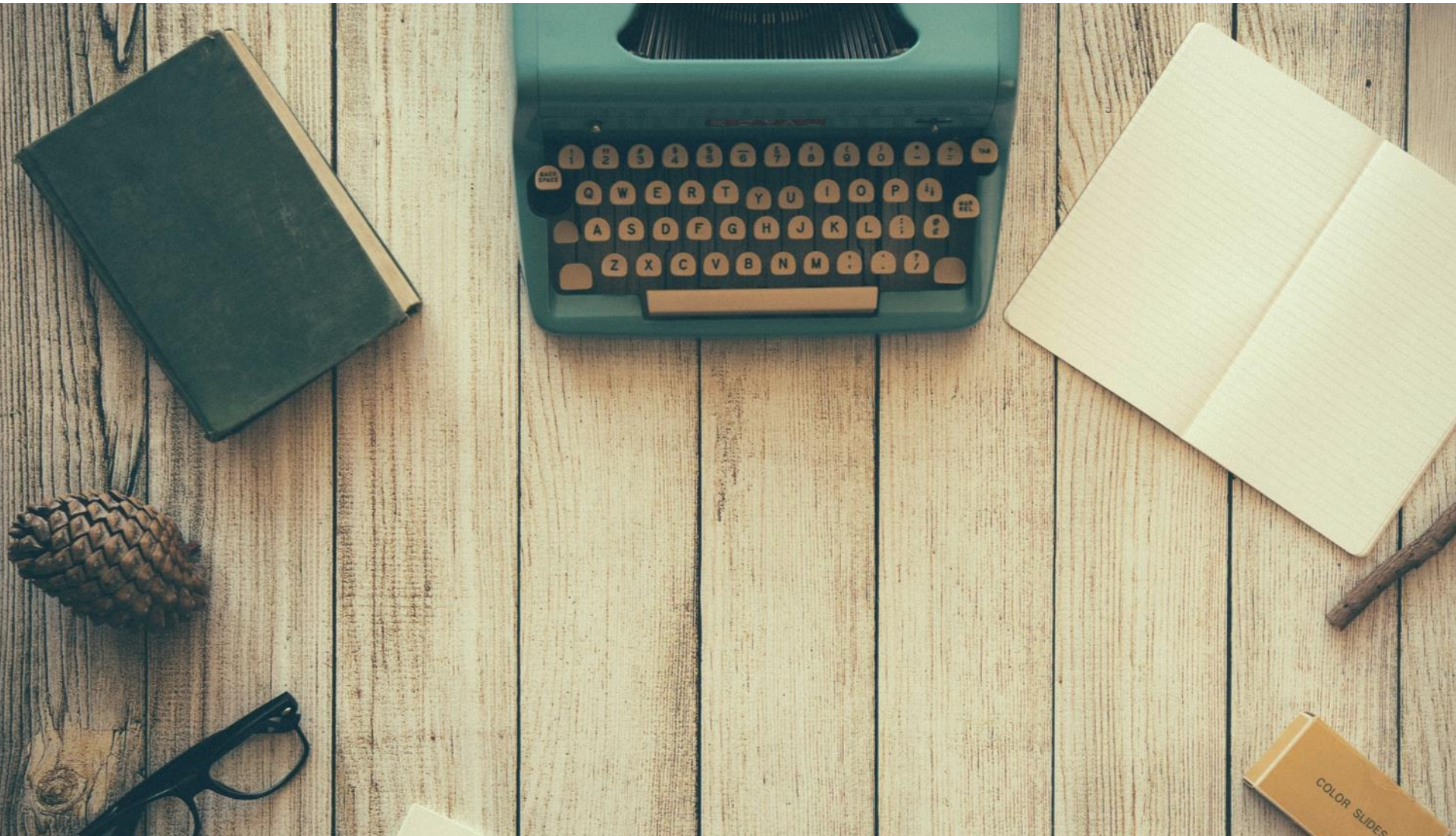

What is Documentation?

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What?	Object name
	Description
	Materials
Where?	Object location
Who?	Acquisition information
	Associations

Documentation takes many forms…

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- Accession registers
- Object history files
- Trustee meeting minutes
- Entry forms
- Donor letters

Why do we do it?

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Standards

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ARTS COUNCIL ENGLAND

Spectrum

ACCREDITED MUSEUM

MUSEUMS ASSOCIATION

Spectrum

Primary Procedures

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- Object entry
- Acquisition
- Location and movement control
- Cataloguing
- Object exit
- Loans in
- Loans out
- Retrospective documentation

http://collectionstrust.org.uk/spectrum/

Object Entry

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This procedure is for the receipt of objects and associated information which enter your premises for whatever reason.

It is the key to ensuring that all objects that enter your premises are accounted for. It applies to all objects entering your care, including loans, enquiries, and acquisitions to permanent or support collections. You are expected to take the same care of objects not belonging to you as you would with your own objects. You might be held liable for loss of, or damage to, objects whether solicited or not.

Why is it important?

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OBJECT ENTRY FORM

Sheet of

MUSEUM NAME: Anytown Museum | **Form No:** E0992

Received from: Mrs. S. Jarvis
Address: 23 Balmoral Road, Anytown, Mids.
Tel No: 978123

Owner (if different): Mr. M. Ledger
Address: 46 Market Street, Anytown, Mids.
Tel No: 388978

DESCRIPTION OF OBJECT/COLLECTION (note obvious damage, & any related information eg. when, where, or how was it found or used; names, dates & details of the people who made or previously owned it, etc. **Continue on a new sheet if necessary)**

Items from owner's mother's house

1. School blazer from Anytown High School
2. Carriage Clock with key
3. School exercise book from Anytown High School, Cover ripped

The Owner's mother was Mrs. V. Ledger. She lived at 27 High Street, Anytown from 1970 - 2007 and was a music teacher at Anytown High School from 1978 - 1998

Total no. of items: 3

REASON FOR ENTRY (tick as applicable, and sign)

- ☑ **Gift** - I offer to give the object(s) listed above to the museum's governing body.
- ☐ **Sale** - I offer to sell the object(s) listed above to the museum's governing body (price sought £.....).
- ☐ **Loan** - I offer to loan the object(s) listed above for the use of the museum's governing body for a period of ..... months.
- ☐ **Identification** - I leave the object(s) listed above for identification & undertake to collect these no later than 4 weeks from today.

I confirm that the information given on this form is correct to the best of my knowledge and belief, & that I accept the terms and conditions described overleaf.

Signed: S Jarvis Date: 6.3.2008

ADDITIONAL AGREEMENT (GIFT/SALES ONLY) (tick as applicable, and sign)

- ☑ I, the **owner**, confirm that I have undisputed title to the object(s) listed above, with full power to dispose of the items and transfer such title to the museum's governing body. OR
- ☐ I, the **depositor** acting on behalf of the owner(s), confirm that the owner(s) have undisputed title to the object(s) listed above, with full power to dispose of the items and transfer such title to the museum's governing body, & that I am authorised by the owner(s) to act on their behalf to that effect.

The title in the objects listed above, & subject to the conditions overleaf, is hereby transferred to the governing body of the museum.

Signed: M. Ledger Date: 16.3.2008

MUSEUM SIGNATORY

Receipt of the object(s) described above is hereby acknowledged.

Signed: (on behalf of the museum's governing body) D Barnes Date: 6.3.2008

RETURN OF OBJECT TO OWNER (tick as applicable, and sign)

I, the depositor/owner, acknowledge the return of the object(s) described above in a satisfactory condition following:

- ☐ identification
- ☐ the end of the period of loan
- ☐ the museum's governing body declining to accept the donation, loan or purchase of the object(s)

Signed: **Countersigned** (for museum): Date:

WHITE - MUSEUM (FILE)
PINK - DEPOSITOR/OWNER (RECEIPT)
BLUE - MUSEUM (TO ACCOMPANY OBJECT/S)

Conditions of Deposit

General

The museum will take the same care and precautions for the protection of the item(s) described overleaf, whilst they are in its custody as it does for those in its permanent collections. Except in the case of negligence on the part of itself, its officers or employees, the museum's governing body does not accept liability for loss of, or damage to, or deterioration in, the item(s) described overleaf. **No valuation indicated verbally or written on this form at the time of deposit will be admitted by the museum.**

When item(s) are left at the museum for whatever reason, the second (pink) part of this form will be given to the depositor as a receipt. This must be presented when the item(s) are returned to the owner or their representative. Both it and the museum file part of the form (white) will then be signed by the person receiving the item(s) to acknowledge their receipt in a satisfactory condition. The owner (or the owner's representative) and the museum will retain their respective parts of the form.

Enquiries & Identifications

Neither the museum's governing body, nor it's officers or employees, can accept any responsibility whatsoever for an opinion that may be expressed on items submitted for examination. Opinions may be given only to the owner of an item or to the representative of the owner.

Museum staff are not authorised to give valuations, to assist in the disposal of private property, or to express opinions regarding the merits of business firms.

It is the depositor's responsibility to collect item(s) described overleaf and left for identification within 4 weeks of the date of the form. In the event of the item(s) not being collected within that period, the museum's governing body reserves the right to dispose of the item(s) as it thinks fit after a period of 4 months from the date of the form.

Acquisitions

The museum has a collecting policy which limits those items which it may acquire. Not all offers of loans, gifts or sales can be taken up. If the museum's governing body does not accept such an offer, the owner will be advised in writing. In the event of items not being collected within 4 months of the date of this form, the museum's governing body reserves the right to dispose of the item(s) as it thinks fit.

In the case of acquisition by the museum's governing body of the item(s) described overleaf by gift or sale, the owner (or the person authorised to act on behalf of the owner) transfers to the museum's governing body absolute ownership of those items together with any rights of copyright or reproduction held by the owner in respect of those items, without condition other than that the governing body will hold the items on trust for use by it's museum for it's purposes and in accordance with those provisions of the Museum Accreditation Standard in force at the time of the gift. In addition, the owner (or authorised person) permits the museum to capture, store, edit and transmit any narrative or intellectual material associated with the item at the point of acquisition or thereafter irrespective of format and in perpetuity.

This form acts as a first receipt for material offered for loan; if accepted, loan items will be subject to a separate **loan agreement** to which additional conditions (including a specific return date and agreed valuation) will apply. Loans are never accepted for an indefinite period, but may be renewed.

Special Conditions

If special conditions, additional to the above, are agreed between the museum and the owner/depositor these should be recorded on a separate sheet, to which the owner/depositor and an authorised museum representative must both be signatories.

REASON FOR ENTRY (tick as applicable, and sign)

- [x] **Gift** - I offer to give the object(s) listed above to the museum's governing body.
- [ ] **Sale** - I offer to sell the object(s) listed above to the museum's governing body (price sought £.....).
- [ ] **Loan** - I offer to loan the object(s) listed above for the use of the museum's governing body for a period of ..... months.
- [ ] **Identification** - I leave the object(s) listed above for identification & undertake to collect these no later than 4 weeks from today.

I confirm that the information given on this form is correct to the best of my knowledge and belief, & that I accept the terms and conditions described overleaf.

Signed: S Jarvis Date: 6.3.2008

Acquisition

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This procedure is for the addition of objects, and associated information, to your collections and their possible accession to your permanent collections.

It is possible for you to acquire items but not make them part of your permanent collections, e.g. handling collections and reproductions

Transfer of Title

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ADDITIONAL AGREEMENT (GIFT/SALES ONLY) (tick as applicable, and sign)

☑ I, the **owner**, confirm that I have undisputed title to the object(s) listed above, with full power to dispose of the items and transfer such title to the museum's governing body. OR

☐ I, the **depositor** acting on behalf of the owner(s), confirm that the owner(s) have undisputed title to the object(s) listed above, with full power to dispose of the items and transfer such title to the museum's governing body, & that I am authorised by the owner(s) to act on their behalf to that effect.

The title in the objects listed above, & subject to the conditions overleaf, is hereby transferred to the governing body of the museum.

Signed: M. Ledger Date: 16.3.2008

TRANSFER OF TITLE FORM

Sheet of

Institution: transfer of title number T0138

ACQUISITION

The museum gratefully acknowledges the acquisition into the collection of the items described below, from:

Mr. M. Ledger
46 Market Street
Anytown
Midshire

Acquisition method: Gift **date:** 16.3.2008

DESCRIPTION OF ACQUIRED MATERIAL

entry form number	accession number	
E0992		
identity number		**brief description**
2008.130.1		School blazer from Anytown High School
2008.130.2		Carriage clock with key
2008.130.3		Exercise book from Anytown High School

TRANSFER

In order to complete the transfer of title from you to the museum, we would be grateful if you could read the relevent notes overleaf and then sign this form to confirm that the details above are correct and that you accept the conditions overleaf. Please retain the second (yellow) part of the form for your files and return the first (white) part to the museum.

Museum officer: D. Barnes **date:** 16.3.2008

Depositor: M. Ledger **date:** 16.3.2008

We recommend that you keep the second part of this form in a secure place. It would help the museum if it could be produced in the event of any query concerning the acquisition or the items.

WHITE - MUSEUM TRANSFER OF TITLE FILE
YELLOW - DONOR
BLUE - MUSEUM OBJECT HISTORY FILE

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Physical Property

OR

Intellectual Property

name: date Dorothy Barnes : 24.10.2008

entry number	accession number	date acquired	acquired from	acquisition method	simple name; basic description; identification; historical information	notes
E0987	2008.127	20.10.2008	Mrs. A. Brown 12 Lovers Lane Joyville Midshire	Gift	1. Bedstead : brass 1 metre 37cm bed on castors white porcelain knobs with floral decoration. 2. Straw mattress, blue and white ticking, very poor condition	Mattress destroyed following attacks by mice and partial disintegration D.Barnes, 21.2.2012 Approved by Committee 19.2.2012, See X0034
E0989	2008.128	24.10.2008	Mr. R.W. Jones (deceased) 103 Mill Road Newtown Midshire	Bequest	Top hat, black silk, size 7. Made by Josiah Wigley, New Bond Street, London	
	2008.129	Unknown	Unknown	Unknown	Railway ticket, 3rd class return, Anytown low level to Joyville, dated 11.4.1906	Found unaccessioned in Stores, no previous documentation traced
E0992	2008.130	6.3.2008	Mr. M. Ledger 46 Market Street Anytown Midshire	Gift	1. School blazer from Anytown High School, blue with red and gold badge on breast pocket 2. Carriage clock with key. Brass case, white enamelled dial, height 21.3cm 3. Exercise book : blue paper, front cover printed 'Anytown High School.' Front cover ripped. Above items from the house of Mrs. V. Ledger (donor's mother), 27 High Street, Anytown. She was a music teacher at Anytown High School from 1973 - 1998.	

Accession numbers

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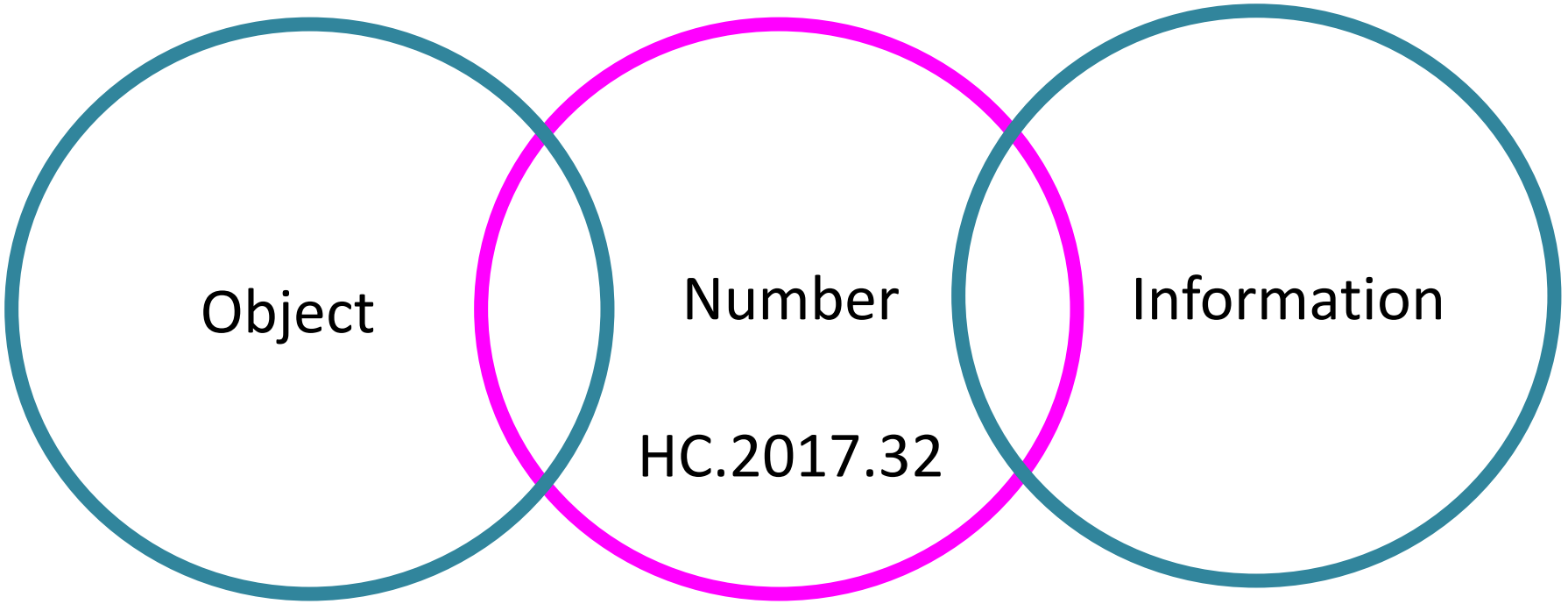

http://collectionstrust.org.uk/resource/spectrum-advice-labelling-and-marking-museum-objects/
http://collectionstrust.org.uk/resource/spectrum-advice-numbering/

How do you do it?

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Cataloguing

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This procedure is about the compilation and maintenance of key information, formally identifying and describing objects. It may include information concerning the provenance of objects and also collections management documentation e.g. details of acquisition, conservation, exhibition and loan history, and location history.

It need not bring together in one location everything known about an object, but should provide

cross-references to any other relevant information source known to you.

What should we record?

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What should we record?

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A suggested minimum:

- Object number
- Object name
- Number of items or parts
- Brief physical description
- Acquisition method, date and source information
- Location
- Reference to any images

There may be additional information that is important for your organisation / collection.

Terminology control

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http://collectionstrust.org.uk/resource/spectrum-advice-terminology-control/

Consistency

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Loans In

This procedure is for the borrowing of objects for which you are responsible for a specific period of time and for a specified purpose. This is usually for exhibition and display, but can include for research, conservation, education, reproduction, and publication.

Loans Out

The management and documentation of the loan of objects to other organisations or individuals for a specific period of time and for a specific purpose, normally exhibition and display, but including research, conservation, photography and education.

Policy decisions

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Consider:

- Acceptable reasons for borrowing and lending objects
- Conditions you will accept / ask others to accept
- Minimum / maximum length of a loan period
- How loans can be authorised
- How to deal with historic loans where original lender cannot be traced to return object/s

Loan requests

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- Dates of proposed loan
- Venue/s
- Context and purpose
- Lender’s name and address
- Contact name and details
- Accession numbers of requested object/s
- Brief descriptions of requested object/s
- Statement of intended insurance or indemnity

Loan agreements

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- Potential costs the borrower will be expected to meet
- Public access to the object/s
- Insurance / indemnity requirements
- Handling conditions
- Environmental conditions
- Food and drink restrictions
- Use and reproduction
- Acknowledgements and credit line requirements
- Packing and courier requirements

Questions

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Take a break

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Location & Movement Control

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This procedure is about the information concerning the current and past locations of all objects or groups of objects in your care to ensure you can locate any object at any time.

A location is a specific place where an object or group of objects is stored or displayed.

Describing locations

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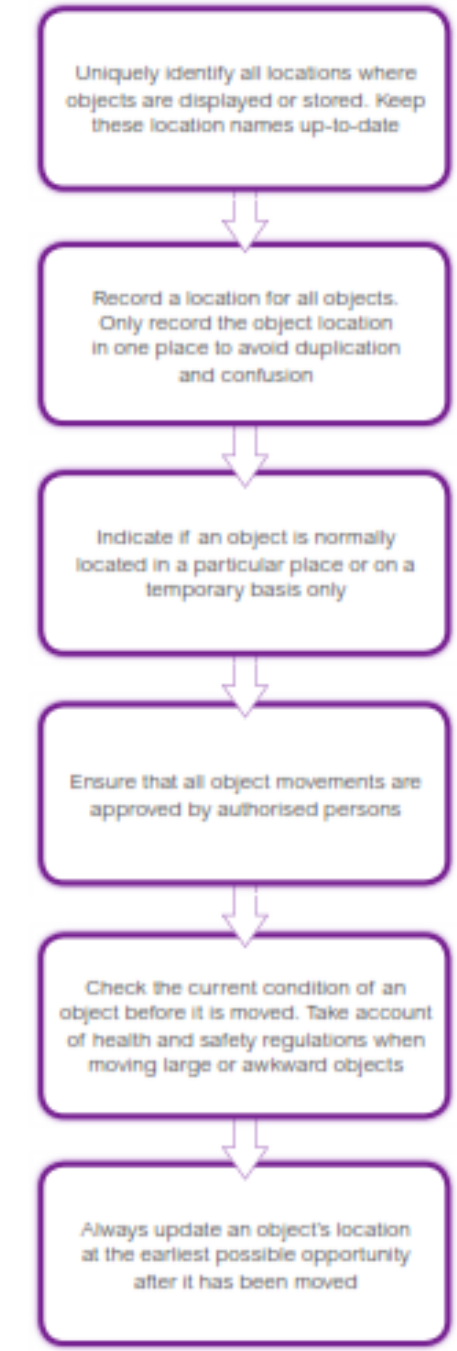
How do we do it?

Object Movement Ticket	
Object Number	1998.130.1
Object Name	Kettle
Old Location	Attic B7
New Location	Domestic gallery C5
Reason	Display
Moved by : date	① Barnes : 17.12.2007
Permanent	~~Yes~~/No



Object Exit

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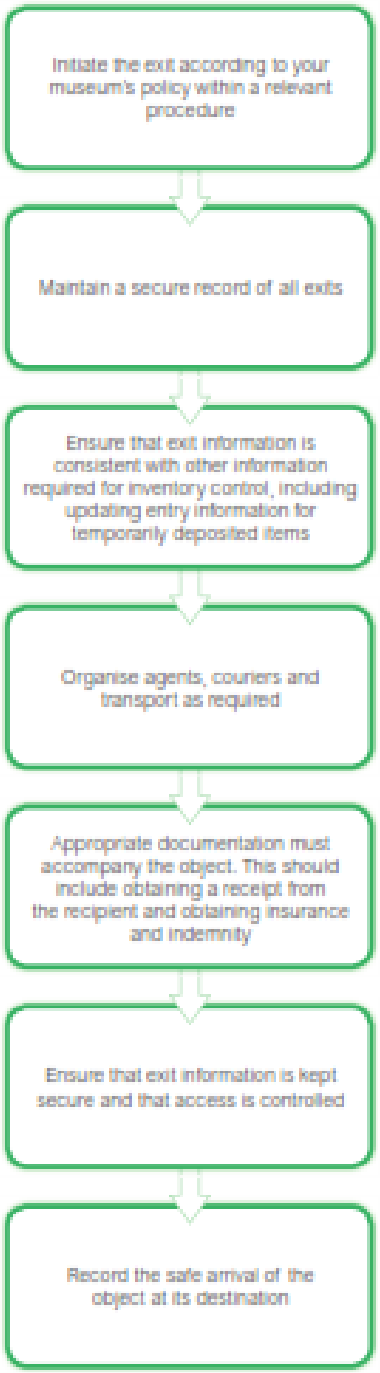
This procedure is for objects that leave your premises for any reason.

These reasons include:

- on loan for an exhibition
- being photographed or conserved
- transfer to another organisation
- disposal

What is recorded?

- Name and contact details of recipient
- Reason for exit
- Condition of object/s
- Date of exit
- Return date if applicable
- List of objects – including accession numbers and brief descriptions
- Signature of the remover and museum representative



EXIT FORM

Sheet of

Institution: exit number X0069

REMOVAL

remover: Borrower — phone number:

address:

recipient: A. Chalk — phone number:

address: Priory School, Priory Walk, Newtown, Midshire

ITEMS

identity number	brief description	condition	insurance valuation
1972.46	Box iron (with heating elements)	Good	£20
1966.72.11	Sugar cutters	Good	£20
1998.130.1	Kettle	Fair (lid Scratched)	£35

EXIT

method or reason: Loan — insurance valuation: £75 — return required? Yes — agreed return date: 1.6.2008

note: School loan "Victorian household" project

museum: I agree that the information given on this form is correct: signed D.Barnes — date 1.4.2008

remover: I acknowledge receipt of the item(s) described above: signed A.Chalk — date 1.4.2008

recipient: I acknowledge receipt of the items and accept the conditions overleaf: group number — signed — date

ACTION

third part of form passed to file: signed D.Barnes — date 1.4.2008

second part of form returned and passed to file: signed D.Barnes — date 1.4.2008

note

returned items: I acknowledge the return of the item(s) described above, in satisfactory condition: signed D.Barnes — date 1.6.2008

See over for instructions on how to use this form

Deaccession and Disposal

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This procedure is for the management of disposal (for example the transfer, or destruction of objects) and of deaccession (the formal process of removing an object from your permanent collections, and documenting of that).

Reasons for disposal

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- Improved care for the item
- Improved access to the item; increased enjoyment of and engagement with the item by the public
- Improved context for the item
- Continued retention of the item within public museum collections or the wider public domain
- Removal of any hazard posed by an item (e.g. through contamination)

MA Disposal Toolkit

https://www.museumsassociation.org/collections/disposal-toolkit

Unacceptable

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- For financial reasons (unless in exceptional circumstances)
- On an ad hoc basis (i.e. other than as part of an approved collections development policy)
- Without considering advice from someone with specialist knowledge of this type of item
- If the disposal would adversely affect the public reputation of museum
- If the disposal would not be in the long-term public interest
- Outside the public domain, except in exceptional circumstances.

Methods of disposal

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- Free gift or transfer to another Accredited museum
- Exchange of items between museums
- Free gift or transfer to another institution or organisation within the public domain
- Return to donor
- Sale to an Accredited museum
- Transfer or sale outside of public domain
- Recycling
- Destruction

What information do we record?

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- reasons for disposal
- desired outcome
- opinions and advice considered
- method of disposal
- conclusion of process: retention, transfer, sale etc.
- any conditions attached
- information relating to the item and photographs
- documentation relating to transfer of title
- note of any new location

Objects you might not own

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- Uncollected enquiries
- Unsolicited gifts
- Objects with no documentation
- Historic loans

http://collectionstrust.org.uk/resource/disposing-of-objects-you-may-not-own/

Objects you might not own

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- Prevention is better than cure – policy, object entry and acquisition, communication
- Establish the status of the object/s:
  - Intent to give?
  - Checking documentation
- What is the risk?
- Record all decisions and actions

https://www.museumsassociation.org/download?id=1151041

Questions

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Procedural manual

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Requirement 2.7

Collections management procedures

Documentation procedures

The primary SPECTRUM procedures must be in place in the form of a documentation procedural manual that is available for inspection on request.

http://collectionstrust.org.uk/resource/developing-a-documentation-procedural-manual/

Example: location and movement control

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‘They’re only assets if you can find them’

- unknown

Collections Management Systems

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Organising information

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Information can be broken up and stored in a number of different pieces, or Units of Information:

- Donor name
- Object description
- Accession number
- Acquisition method
- Condition

Choosing a CMS

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Only as good as the underlying documentation

Resources

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- Budget
- Time (researching, set up, project management, data transfer)
- Skills (understanding of museum documentation, IT literacy etc.)
- Minimum hardware requirements
- Operating system e.g. windows / apple?
- Storage space (external hard drive, cloud etc.)

People

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User access, training, support

How many objects?

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How many objects?

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Can be a red herring…

Software features

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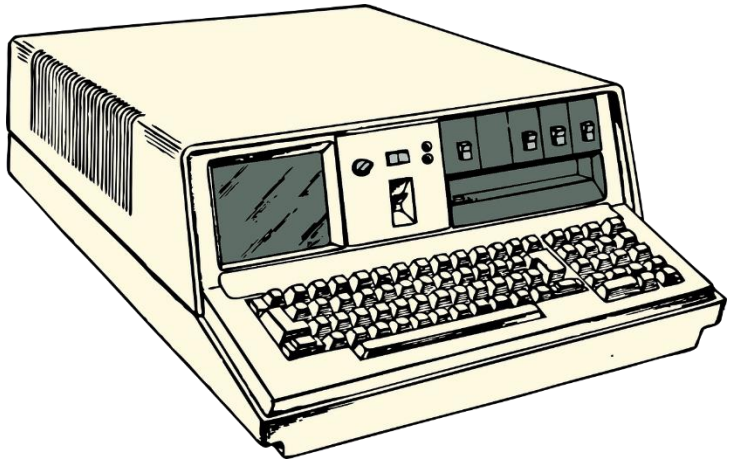
- Audit trails
- Password security
- Thesaurus for data entry
- Search functions
- Screen designer
- Reports
- User-modifiable data structure
- Technical support and help menus
- Data import and export



Discussion

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Who are your organisation's users and what might they need from a CMS?

What do we want?

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- Future proof: what will we need in several years time?
- Manage processes like loans and exhibitions?
- Record copyright / IPR information?
- Access for different users, including the public?
- User friendly and flexible
- SPECTRUM compliant

DIY or off the shelf?

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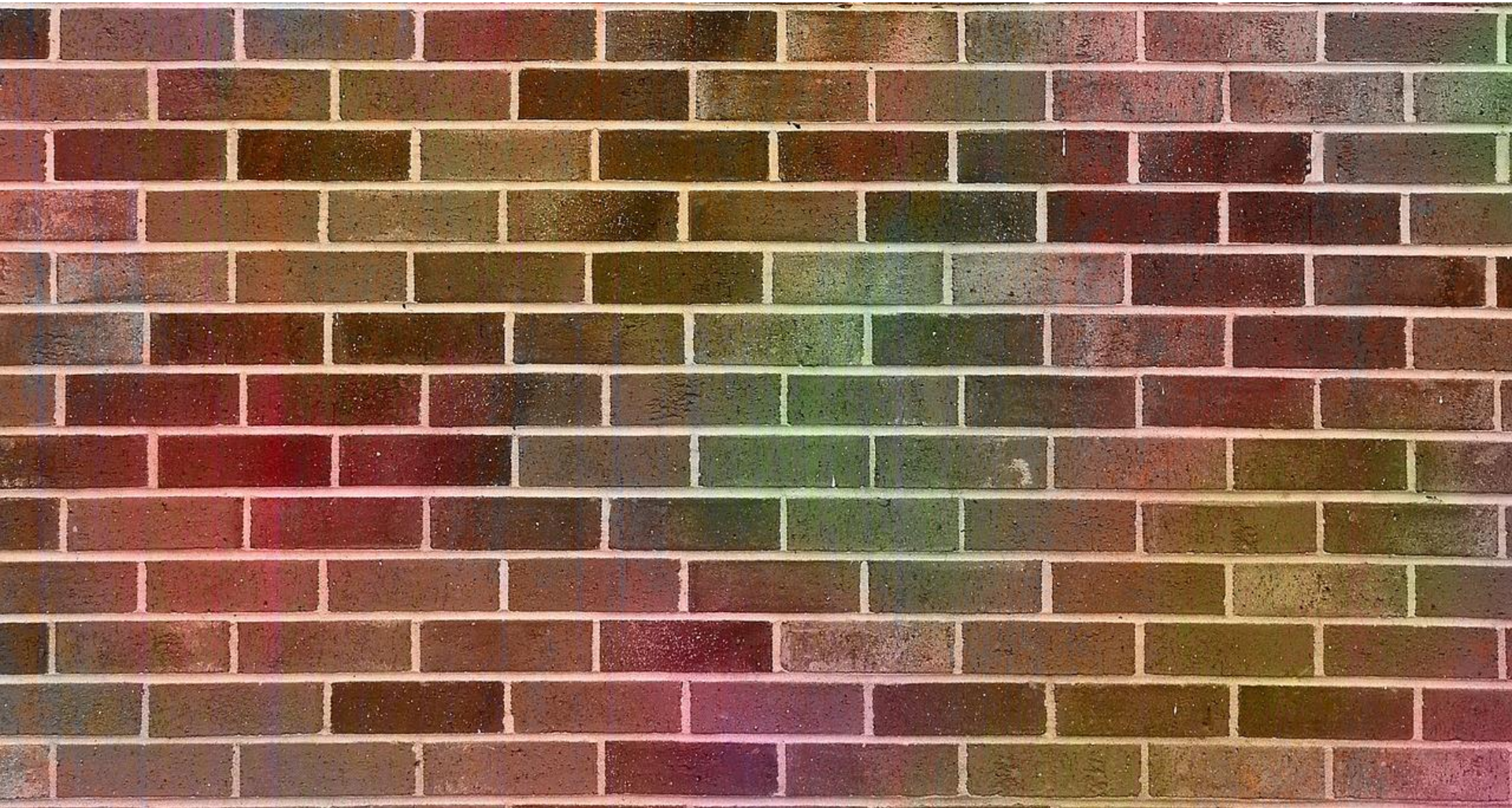

Advantages

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Off the shelf	DIY
○ Uses museum vocabulary ○ System is ready to use ○ Suppliers have learnt from the experience of other users ○ Training ○ Less technical expertise required within your museum ○ Likely to have terminology control features ○ Likely to be SPECTRUM compliant	○ Lower initial purchase price ○ Tailored precisely to your requirements ○ Learn from the experience of other users ○ Use locally available expertise

Disadvantages

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Off the shelf	DIY
○ Initial costs likely to be higher ○ Will the company developing the software keep pace with the development of more standard business databases?	○ System probably depends upon the enthusiasm of one 'expert' who may leave, and not really be an expert ○ Documentation of the application often overlooked ○ May take some time before a working system is available – the time spent developing could have been spent entering data ○ Will need to research and establish terminology

Choosing a CMS

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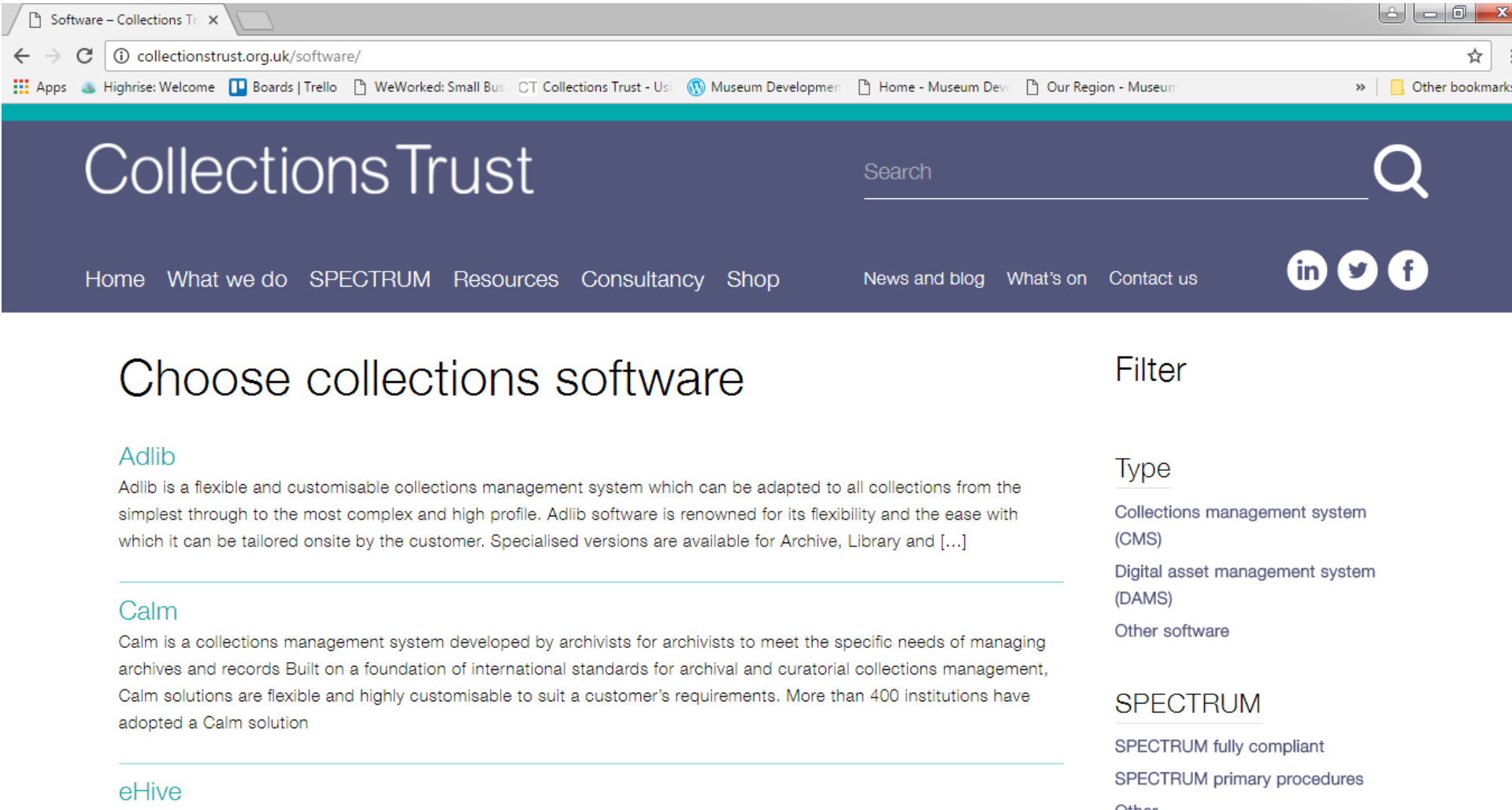
http://collectionstrust.org.uk/software/



One thing I love about you…

One thing you like about your CMS

One thing you wish was different

and/or an action from today

Other useful links

http://collectionstrust.org.uk/shop/

http://collectionstrust.org.uk/resource/spectrum-advice-re-numbering/

http://collectionstrust.org.uk/resource/spectrum-advice-retrospective-documentation-and-making-an-inventory/

https://www.gov.uk/guidance/copyright-orphan-works

Questions & Discussion

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Contact

Collections Trust

sarahb@collectionstrust.org.uk

@CollectionTrust

#CToutreach