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Collections
Trust



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4 Hold and develop collections

To meet the standard, you'll need:

4.1

To take responsibility for all the collections you manage

You must be able to tell us the size of your collections, the proportion the museum owns, and the proportion on loan to it. If a significant proportion of the collection is on loan you'll need to explain the loan arrangements in place and assess any risks.

4.2

A policy, approved by the governing body, for developing collections, including acquisitions and disposals

Your collections development policy must include:

- the museum's statement of purpose
- an overview of current collections
- themes and priorities for future collecting
- themes and priorities for rationalisation and disposal
- information about the legal and ethical framework for acquiring and disposing of items
- the date you'll next review the policy

5 Hold useful and useable information on collections

To meet the standard, you'll need:

5.1

An approved documentation policy

Your museum must follow a collections documentation policy approved by your governing body.

This policy may be a separate documentation policy or statement, or it may be part of a wider collections management or documentation plan.

5.2

To follow the primary Spectrum documentation procedures

The primary Spectrum procedures are essential for managing collections effectively and making them accessible. You need to show that your museum follows these procedures or has a plan to do so. The primary Spectrum procedures are:

- object entry
- acquisition and accessioning
- location and movement control
- inventory
- cataloguing
- object exit
- loans in (borrowing objects)
- loans out (lending objects)
- documentation planning

You'll need to show us how you implement the primary Spectrum procedures and how you intend to develop your collection documentation with a written plan showing priorities and timescales.

If we ask, you'll need to be able to show us your documentation procedures manual which should include step-by-step instructions for completing the primary Spectrum procedures at your museum.

<https://www.artscouncil.org.uk/accreditation-scheme/about-accreditation>

Accreditation

<https://collectionstrust.org.uk/accreditation/>

[Home](#) [What we do](#) [Spectrum](#) [Resources](#) [Consultancy](#) [Shop](#)

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[Resources](#) [Accreditation](#)

Accreditation

Here you can find trusted resources that support the UK Museum Accreditation Scheme. They have been brought together by the UK Accreditation partners, together with the museum development providers that support UK museums. The recommended resources are reviewed to make sure they stay current.



In Accreditation

[Organisational health](#) ▼

[Managing collections](#) ▼

[Users and their experiences](#) ▼

Organisational health

Managing collections

Users and their
experiences

The Accreditation scheme sets out nationally agreed standards of good practice and enables museums to assess their

Procedural manual

Evolving series of clear instructions to standardise:

- the capture
- recording
- safekeeping
- use

...of information about museum collections.

<https://collectionstrust.org.uk/resource/developing-a-documentation-procedural-manual-2018/>

Procedural manual

- Provides a written record of the museum's documentation system
- Helps a museum to demonstrate that it meets good practice standards
- Enables information about a museum's documentation system to be passed onto all museum staff
- Ensures continuity of practice and standardisation of procedures
- Saves time - new staff will not waste time trying to work out how the documentation system works so training will be quicker.

Primary procedures

- Object entry
- Acquisition and accessioning
- Location and movement control
- Inventory
- Cataloguing
- Object exit
- Loans in (borrowing)
- Loans out (lending)
- Documentation planning

Accountability



Procedural manual

- Introduction – the museum's statement of purpose, roles and responsibilities etc.
- History of the museum's documentation systems - examples of records which are no longer in use in your museum, and their location, historic numbering systems etc.
- Collections management policies – where to find them

Procedural manual

- The Spectrum definition of each procedure
- The Spectrum minimum requirements for each procedure
- Details of staff or volunteers responsible for the overseeing and/or carrying out the procedure
- How and when the procedure takes place
- Materials required and where to find them
- The information to be collected during the procedure, including completed examples of forms etc.
- Any additional information relevant to that procedure

Object Entry

Definition: Logging all objects coming into your care for whatever reason, including loans, enquiries and potential acquisitions.



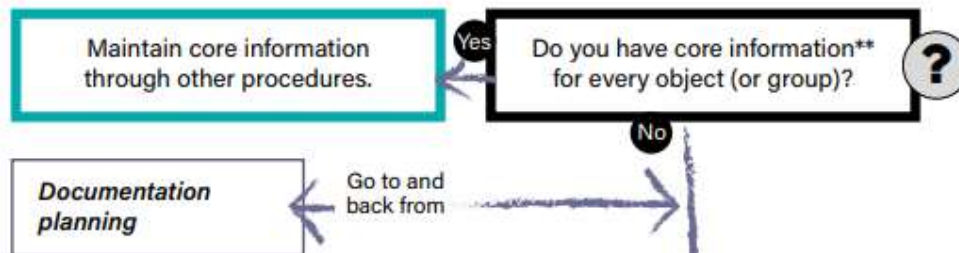
Manual: activity

- Can you suggest any improvements that could be made to the *Object entry* procedure?
- Does your museum do things differently, and why?
- Does the manual include enough information?



Inventory

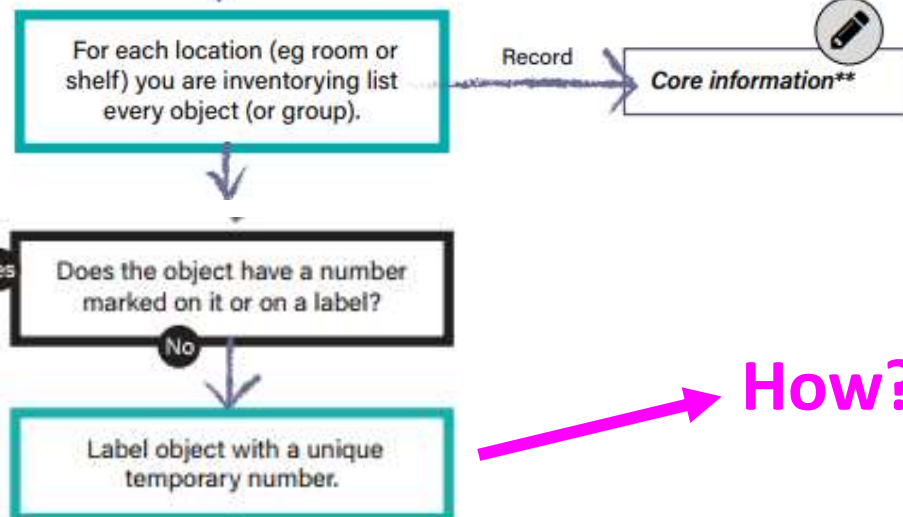
Checking you have core information



**Minimum core information for each object (or group of objects) is:

- Object number
- Object name
- Number of objects (if a group)
- Brief description (or image)
- Current location
- Current owner (if not your museum)
- Recorder and date

Producing an inventory



How?

Resources

Spectrum related resources:

<https://collectionstrust.org.uk/spectrum-resources/>

The screenshot shows a web browser window with the URL <https://collectionstrust.org.uk/spectrum-resources/>. The page title is "Spectrum-related resources". Below the title, there is a paragraph: "You can find helpful resources relating to each Spectrum procedure here. We will be adding to this section over the coming months and updating resources in line with Spectrum 5.0." The main content area features a grid of six teal-colored boxes, each representing a resource category: "Object entry", "Acquisition", "Location and movement control", "Inventory", "Cataloguing", and "Object exit". On the right side of the page, there is a vertical sidebar titled "In Spectrum-related resources" which lists the same six categories with a downward arrow next to each, indicating they are expandable or clickable links.

Resources > Spectrum-related resources

Spectrum-related resources

You can find helpful resources relating to each Spectrum procedure here. We will be adding to this section over the coming months and updating resources in line with Spectrum 5.0.

Object entry	Acquisition	Location and movement control
Inventory	Cataloguing	Object exit

In Spectrum-related resources

- Object entry ▾
- Acquisition ▾
- Location and movement control ▾
- Inventory ▾
- Cataloguing ▾
- Object exit ▾
- Loans in (borrowing objects) ▾
- Loans out (lending objects) ▾

Procedural manual

Acquisition and accessioning – scope

Print-friendly PDF

Date created: 2017
Publisher: Collections Trust

Acquisition and accessioning – scope

By accessing this resource, you agree to the [Spectrum licence](#).

In legal terms, acquisition involves a 'transfer of title' from the previous owner to you. The procedure gives you proof of ownership, and it assigns a unique number that will link each object to the information you hold about it.

Accessioning has a very specific meaning: it brings with ethical responsibilities to preserve objects over the long term, and should not be done without careful thought in the light of your agreed collecting policy. This procedure assumes that most of the objects you acquire will be accessioned.

However, you might acquire objects for other reasons, such as using them in handling activities or as display props. In that case, use part of this procedure but do not formally accession the items. Occasionally you might accession things you already own that have become significant over time (eg Victorian display cases).

Download

Further resources

Related resources →

Example forms

Example Entry form

<https://collectionstrust.org.uk/resource/object-entry-forms/>

Example Exit form

<https://collectionstrust.org.uk/resource/>

Example Accession register

<https://collectionstrust.org.uk/resource/accesion-registers/>

<https://collectionstrust.org.uk/resource/documentation-procedural-manual-from-the-british-schools-museum/>



BRITISH
SCHOOLS
MUSEUM

Documentation Procedural Manual

Version 2018.
Mark Copley

What to do...

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Resources

Marking and labelling guidance:

<https://collectionstrust.org.uk/resource/labelling-and-marking-museum-objects-booklet/>

<https://collectionstrust.org.uk/resource/guidelines-on-marking-and-labelling-methods/>

Marking and labelling videos:

<https://collectionstrust.org.uk/resource/labelling-and-marking-textiles-in-museum-collections/>

New GDPR guidance

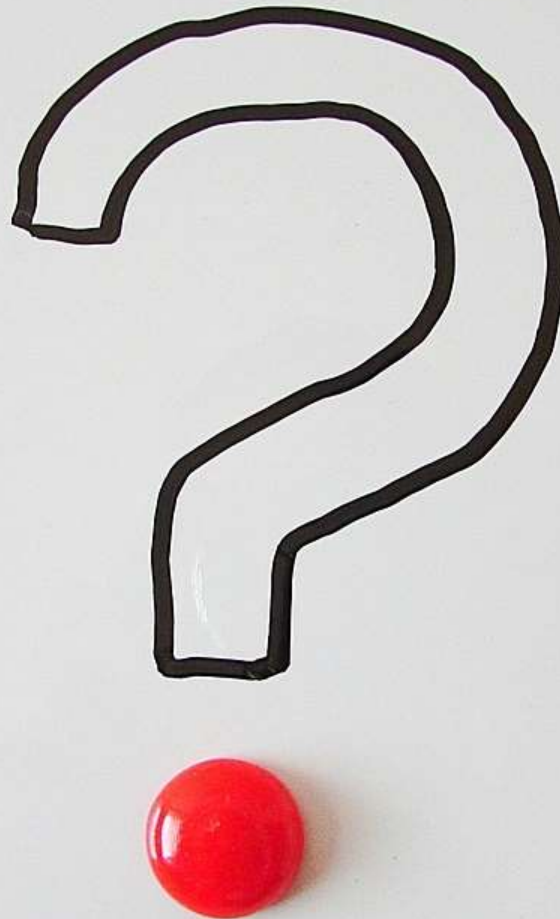
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<https://collectionstrust.org.uk/resource/data-protection-guidance-sheet/>



Questions

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Documentation planning

Definition: Making your documentation systems better and enhancing the information they contain as an ongoing process of continual improvement.

Spectrum requirement:

Review the collections information you already have and agree areas for improvement in the light of your collection management priorities.

Documentation Planning

Spectrum requirement:

You have a written documentation plan setting out specific objectives that can be achieved within a realistic timeframe given the available resources.

Spectrum requirement:

You review progress towards achieving your plan's objectives regularly.

Documentation Plan

- What elements make up your documentation system? E.g. accession registers, forms, computer systems etc.
- Objectives you wish to achieve, referring to any relevant standards – legal and ethical.
- Priorities for improving collections information.

<https://collectionstrust.org.uk/resource/documentation-planning-pack-2018/>

Documentation Plan

1. Introduction: context and background
2. Documentation systems
3. Backlogs and priorities
4. Action plan
5. Risk analysis

<https://collectionstrust.org.uk/resource/documentation-planning-pack-2018/>

Object entry

Requirement	Met?	Notes
You can account for all objects left in your care.		Staff and volunteers are not aware of the policy regarding objects left at the museum, or the details of our Collections Development Policy, and there is no communication about policy with the public. If an object is taken to the Collections Manager's office, we do not record its movement or new location.
You have clear terms and conditions for accepting objects into your care.		There is no consistency on the use of entry forms and receipts are often not given.
You record why objects have been left with you.		As above.
You schedule the default return of objects to the owner if they are not to be acquired or loaned.	✓	
You record who legally owns objects left with you.	✓	Whilst not done consistently on entry forms, owner details are always recorded.
You assess and mitigate any potential risks to people or other objects from incoming objects.	✓	
You record as much significant information about newly-arrived objects as you can, to be added to in the future.		As above.
Both you and owners know your liability for loss or damage while objects are in your care.		As above.
You provide a receipt for owners and get a signature to show they accept your terms and conditions.		As above.
You can uniquely identify newly-arrived objects.		We do not attach the entry number to deposited objects, and although all objects are kept in the cupboard at the museum desk, sometimes objects go astray.

Actions required:

1. Consult, prepare and agree amendments to Greendale's Collections Management policies concerning the entry of objects to the museum. The policy statements need to agree:

- The circumstances and terms under which objects are accepted at the museum desk.
- The terms under which they are cared for and returned to their owners.
- The roles within the museum who are responsible for accepting objects into the care of the museum, and into the long-term collections.

2. Implement the use of Collections Trust Entry forms for every object deposited at the museum

3. Amend the Object entry procedure in Greendale's procedural manual to reflect changes

4. Train all staff and volunteers, including front of house, in the Object entry policy, procedure and in the use of the Entry forms

Documentation Plan

- Actions your organisation will be taking to meet those objectives (e.g. take photographs of the objects, carry out rights research on the collection).
- Resources (e.g. people and time) that will be needed.
- Measurable results that are based on the stated objectives.
- Milestones that can be used to review progress by specified dates.
- Roles and responsibilities.
- Be realistic.

4. Action Plan for Greendale Museum

See Appendix 1 for a summary timetable for actions 1-10

Aim: to improve Greendale Museum's documentation system so that it meets the standard for the Spectrum primary procedures						
	Action	Approx. timescale	Resources	Action by	Progress	Notes
Object entry						
1	Consult, prepare and agree amendments to Greendale's' Collections Management policies concerning the entry of objects to the museum	July - August 2018	Staff time	Collections Manager	Complete	
2	Implement the use of Collections Trust Entry forms	By end Sept 2018	Cost of entry forms	Collections Manager		Ordered 100 entry forms from Collections Trust 12.08.2018
3	Amend the Object entry procedure in Greendale's procedural manual	By end Sept 2018	Staff time	Collections Manager		
4	Train staff and volunteers in new Object entry procedure	Oct 2019	Staff and volunteer time Cost of training Cost of refreshments	Collections Manager / FoH Manager / Volunteer coordinator		

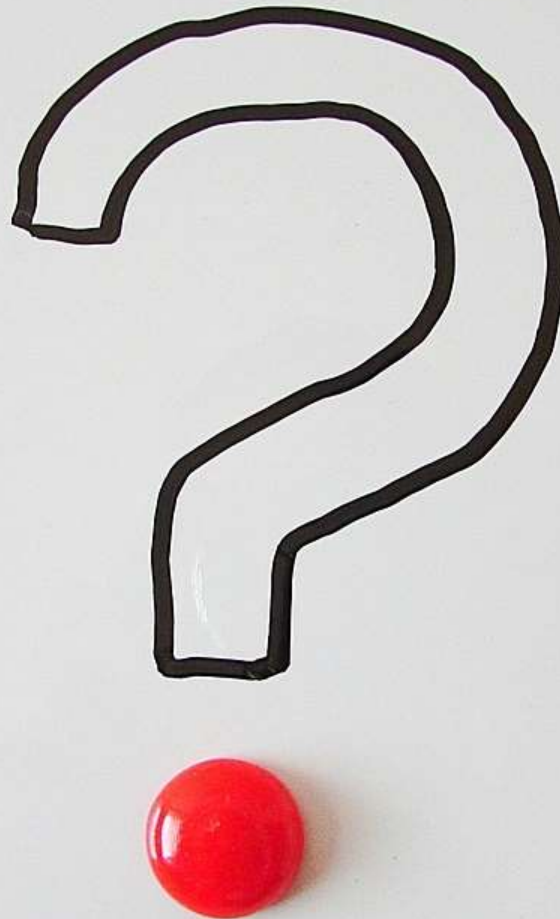
Aim: Inventory of the electronics collections in Rooms 6 and 7						
	Action	Approx. timescale	Resources	Action by	Progress	Notes
10	List the objects in Rooms 6 and 7, using temporary numbers where necessary and creating basic records in Modes:	See 10.1 and 10.2	Tie on labels for temp numbers Cost of refreshments	Collections Manager (Volunteer Team)		Approx. 200 objects a day
10.1	Room 6 (approx. 1000 objects)	By end May 2019	2 volunteers working 1 day a week			
	Exhibition changeover	June – July 2019				
10.2	Room 7 (approx. 2000 objects)	By end Oct 2019	2 volunteers working 1 day a week			
	Review documentation plan timescales	Oct 2019	Staff time	Collections Manager		
11	Reconcile objects with existing documentation	November 2019 – end March 2020	Collections manager working 2 days a week and 2 volunteers working 1 day a week Cost of refreshments	Collections Manager (Volunteer Team)		Approx. 150 a week
12	Review the electronics collection using a collections review matrix	By end May 2020	Staff and volunteer time Cost of refreshments			

5. Risk Analysis

Risk factor	Likelihood	Impact	Mitigation
The completion relies heavily on the input of volunteers. We require their time and expertise. The project will be at risk if we cannot maintain the momentum of the volunteer team.	Medium	High	<ul style="list-style-type: none"> • Invite volunteers to training. • Provide refreshments for volunteers ensure comfortable working conditions, involve volunteer team in planning. • Hold events at half way point and at end of project. • Ensure that volunteer expertise and knowledge is acknowledged and seen to be affecting the outcome of the project.
We cannot deliver the project within the resources available.	Medium	High	<ul style="list-style-type: none"> • Keep the project activity defined - do not over deliver on quality to the detriment of the entire project.
Lack of communication and awareness internally.	Medium	High	<ul style="list-style-type: none"> • Documentation Plan will be added to agenda for Collections team meetings. • Documentation Plan will be added to the agenda for each quarterly Trustee meeting, and a progress report circulated in advance.

Questions

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