

## Required Elements: Collections Management Policy

*Required elements for institutions with collections:*

- Acquisitions/Accessioning
- Deaccessioning/disposal of collections/use of proceeds from the sale of deaccessioned collections
- Loans, incoming and outgoing (if the museum does not lend/borrow, it should at least state this)
- Collections care
- Inventories and/or documentation
- Access and/or use of collections

*Required elements for institutions that do not own or manage collections but borrow and use objects for exhibits, education or research:*

- Care/responsibilities for objects in temporary custody
- Borrowing policies

## Standards Regarding Collections Stewardship

- The museum owns, exhibits or uses collections that are appropriate to its mission.
- The museum legally, ethically and effectively manages, documents, cares for and uses the collections.
- The museum conducts collections-related research according to appropriate scholarly standards.
- The museum strategically plans for the use and development of its collections.
- The museum, guided by its mission, provides public access to its collections while ensuring their preservation.
- The museum allocates its space and uses its facilities to meet the needs of the collections, audience and staff.
- The museum has appropriate measures in place to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses.
- The museum takes appropriate measures to protect itself against potential risk and loss.

### Purpose and Importance

Stewardship is the careful, sound and responsible management of that which is entrusted to a museum's care. Possession of collections incurs legal, social and ethical obligations to provide proper physical storage, management and care for the collections and associated documentation, as well as proper intellectual control. Collections are held in trust for the public and made accessible for the public's benefit. Effective collections stewardship ensures that the objects the museum owns, borrows, holds in its custody and/or uses are available and accessible to present and future generations. A museum's collections are an important means of advancing its mission and serving the public.

### Implementation

Museums are expected to: plan strategically and act ethically with respect to collections stewardship matters; legally, ethically and responsibly acquire, manage and dispose of collection items as well as know what collections are in its ownership/custody, where they came from, why it has them and their current condition and location; and provide regular and reasonable access to, and use of, the collections/objects in its custody.

Achieving this standard requires thorough understanding of collections stewardship issues to ensure thoughtful and responsible planning and decision making. With this in mind, national standards emphasize systematic development and regular review of policies, procedures, practices and plans for the goals, activities and needs of the collections.

## **How Does A Museum Assess Whether Its Collections and/or Objects Are Appropriate for Its Mission?**

This is determined by comparing the institution’s mission—how it formally defines its unique identity and purpose, and its understanding of its role and responsibility to the public—to two things: (1) the collections used by the institution; and (2) its policies, procedures and practices regarding the development and use of collections (see also the Standards Regarding Institutional Mission Statements).

A review of a museum’s collections stewardship practices examines: whether the mission statement or collections documents (e.g., collections management policy, collections plan, etc.) are clear enough to guide collections stewardship decisions; whether the collections owned by the museum, and objects loaned and exhibited at the museum, fall within the scope of the stated mission and collections documents; and whether the mission and other collections stewardship-related documents are in alignment and guide the museum’s practices.

## **Assessing Collections Stewardship**

There are different ways to manage, house, secure, document and conserve collections, depending on their media and use, and the museum’s own discipline, size, physical facilities, geographic location and financial and human resources. Therefore, one must consider many facets of an institution’s operations that, taken together, demonstrate the effectiveness of its collections stewardship policies, procedures and practices, and assess them in light of varying factors. For instance, museums may have diverse types of collections categorized by different levels of purpose and use—permanent, educational, archival, research and study, to name a few—that may have different management and care needs. These distinctions should be articulated in collections stewardship-related policies and procedures. In addition, different museum disciplines may have different collections stewardship practices, issues and needs related to their specific field. Museums are expected to follow the standards and best practices appropriate to their respective discipline and/or museum type as applicable.

## The standards require that:

- A current, approved, comprehensive collections management policy is in effect and actively used to guide the museum's stewardship of its collections.
- The human resources are sufficient, and the staff have the appropriate education, training and experience to fulfill the museum's stewardship responsibilities and the needs of the collections.
- Staff are delegated responsibility to carry out the collections management policy.
- A system of documentation, records management and inventory is in effect to describe each object and its acquisition (permanent or temporary), current condition and location and movement into, out of and within the museum.
- The museum regularly monitors environmental conditions and takes proactive measures to mitigate the effects of ultraviolet light, fluctuations in temperature and humidity, air pollution, damage, pests and natural disasters on collections.
- An appropriate method for identifying needs and determining priorities for conservation/care is in place.
- Safety and security procedures and plans for collections in the museum's custody are documented, practiced and addressed in the museum's emergency/disaster preparedness plan.
- Regular assessment of, and planning for, collection needs (development, conservation, risk management, etc.) takes place and sufficient financial and human resources are allocated for collections stewardship.
- Collections care policies and procedures for collections on exhibition, in storage, on loan and during travel are appropriate, adequate and documented.
- The scope of a museum's collections stewardship extends to both the physical and intellectual control of its property.
- Ethical considerations of collections stewardship are incorporated into the appropriate museum policies and procedures.
- Considerations regarding future collecting activities are incorporated into institutional plans and other appropriate policy documents.

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