Surrey Heath Museum Documentation Procedural Manual

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1. Introduction

1.1 Definition of a Procedural Manual

The Accreditation Standard for museums states that

"The museum must have an up-to-date Documentation Procedural manual to guide the work of staff in documentation at all levels. Such a manual will set out the documentation practices and procedures of a museum in order that information about documentation systems, both manual and computerised may be available to all museum staff, ensuring continuity of practice .It must be reviewed on a regular basis to maintain its currency"

1.2 Aims of the manual

The procedural manual is an important document;

(a) To aid accreditation

(b) To manage the collection more efficiently

(c) To deal with the collection backlog

(d) To aid research

(e) To monitor the care of the collection

1.3 Date of compilation April 2013

1.4 Name of person with ultimate responsibility for documentation

Senior Museum Officer - Gillian Barnes-Riding

2. A history of Surrey Heath Museum Documentation system

The museum was established in 1930 by George Poulter. He was a local historian and collector. His collection became the foundation of the existing collection at the museum. In the 1950s, Frimley and Camberley Urban District Council appointed a Miss Rendall as Curator. She produced the first catalogue of the collection and permanently numbered the collection. We have an incomplete catalogue of the collection from this time.

In the 1980s a MSC scheme was set up to renumber the collection and complete a manual documentation system using prefix letters to represent different categories of the collection. They used MDA cards and the index cards. The groupings were as follows;

(A.A. Borough Records, A. Photography, B. Geology, C. Art, D. Sport and Recreation, E. Domestic and Household, F.Victoriana, G (no category), H. Military, I. Costume, J. Ceramics and Glass, K. National History, L. Museum, M. Agriculture, N. Geology, O. Crafts, Trade and Industry, P. Archaeology, Q. Heraldry, R. Local History, S. Parks and Gardens, T. Topography, U. Foreign, V. Publications, W. Education, X. Architecture, Y. Towns and Counties, Z. Natural History).

In 1984 an accession register was introduced and items began formally to be accessioned in to the collection. The museum prefix SHM with the year and consecutive numbers for each batch of items donated by a single donor was adopted. No categorising of objects was done (e.g. archaeology, art), no cataloguing and items mainly labelled with their donor information and not their accession number.

Unfortunately a large backlog of documentation developed. Prior to being entered into the accession book each item was tagged with the date and donor and entered into a receipt book. There is a large backlog of accessioning from 1986 to 2011 that is being addressed by the Collection Management Plan. The museum lost its accreditation with the Museums and Libraries Archives in October 2011.

The Collection Management Plan dates from 2012; the first year was an audit of the collection pre.1984 (e.g. the MSC Modes cards) and will continue until 2014. Concurrently an audit of the collection post 1984 is being carried out – this will continue until c.2015. All collections are being placed on an in-house database.

Current Documentation is as follows;

1. **Collection 1** - The collection pre.1984 is on Modes Cards. The geology, topography and natural history collections have been placed onto Modes. There are no entry forms of donor information on this collection. This collection is partly on a museum database but there is a lot of data tidying and many items are not located.

2. **Collection 2** - The collections taken in post 1984 to 2011 have entry forms for most items and these are in alphabetical order plus a accession register was introduced. Some objects have been marked (e.eg. paintings) but most have the donor name tied onto them. No cataloguing of this collection has been carried out. There is also a back log of material which has nothing done to it. The accession register has been typed up and placed onto the museum database ready to audit and locate these objects.

3. **Collection 3** – A day book has been in place since January 2011 with entry, exit and loan forms in place. The collections taken in from this date have followed the procedures laid out in this procedural manual and are catalogued on the museum database.

Surrey Heath Museum Mission Statement

"The preservation, management and enhancement of a representative local collection for the Borough of Surrey Heath".

3. Summary of present practice

3.1 Object entry

When any object enters the museum (including items offered for donation, loans, identification or offered to the museum for sale), a museum entry form is completed. The item is concurrently entered into the Museum Day Book and given a Day Book Number.

Three copies of the form are completed

Copy one is filed in the Entry/Exit file.

Copy two is given to the owner or depositor

Copy three remains with the object

The entry forms are filed in numerical order in the Entry/Exit File. The Entry/Exit File is permanently kept in the back office in a fire proof cabinet. No item is to be left at the museum without a member of staff being present. All objects entering the museum must be logged and a signature obtained before the depositor leaves the museum. If a museum representative goes out to collect something, an entry form must be taken with them with the next day book number written on it. If the depositor is not present (but known) when the material is received (e.g. if items arrive through the post), a copy of the entry documentation should be sent as a receipt with a request for a copy to be signed and returned. In the case where the depositor is acting on behalf of the owner of the object, details of the owner and the depositor should be taken.

If the depositor is not known (e.g. if items arrive unexpectedly, anonymously, through the post with no details of ownership), a record should be made with as much detail as possible, including photographs (if legally possible). Include an explanatory note indicating that the depositor was not available to verify details.

All objects entering the museum must be tagged with a temporary label marked with the *day book number.* If the object is in pieces, or cannot easily be tagged, it should be placed in a container and the container should be tagged.

3.2. Location and Movement Control.

If an item is moved, its removal date and number is placed on a movement tag in the box or on a permanent/temporary display list and its new location noted. The Museum database is updated within 24 hours of the item being moved.

3.3 Acquisition

In order for an item to be acquired by the museum, an item must fulfil the criteria outlined in Surrey Heath Museum's Collecting Policy (dated 1996 to 2001).

If an item is accepted into the collection it is entered into the Accession Register and given an accession number. The accession number is made up of the museum's official prefix SHM followed by the year of acquisition (e.g. 1994.23). Its entry form number is recorded in the accession register. The item is then permanently marked. Depending on the method of acquisition, obtain, if applicable, the provenance and background information on the object plus the following documentation -

Bequests

- A legal copy of the relevant section of the will.
- The agreement of the Executor (signature confirming transfer of title).
  Ideally, the organisation should obtain a legal copy of the full will.

Field collection

- A reference to collection site and other field collection information.
- Evidence of right of title as appropriate.
- Evidence of internal and external justification for the collecting.
- Proof that the collecting is both legal and not illicit.
- Evidence of external responsibilities i.e. compliance with Memoranda of Understanding between the organisation and other organisations, countries or governments.
- Evidence of CITES (The 'Washington' Convention on International Trade in Endangered Species of Wild Fauna and Flora) plus export and import permits where applicable.

Gifts

- The signed offer of an object from the donor, including any terms specified - although any gift with attached conditions is strongly discouraged. (A signature confirming transfer of title is preferable, although a signed entry form would give evidence of the reason for deposit where a gift was intended).

- The signed acceptance of the object by the organisation, including any agreed terms. Information about all gifts must be accessible by donor name.

Purchases

- A signed statement from vendors stating that they are the legal owners;
- A signed statement of the provenance of the object (if known);
- The original invoice and receipt identifying the goods purchased;
- The details and conditions of any grant aid received for the purchase.

Exchange

- The transfer of title to the object for which the non-monetary exchange was made.

Treasure

- A record of the treasure inquest, including any expert report submitted as evidence.

Museum archiving once an item has been accepted

- All original documents supporting title should be located in a secure fire proofed area as a core part of the long-term documentation about the collection.

- An acknowledgement letter is then sent to the donor within two weeks of an item being accepted into the collection.

- A copy of the letter is kept in the item's object file.

- The item is then entered onto the museum data base and its store location noted.

- The time lapse between the beginning and end of the accessioning procedure should be no longer than one calendar month.

3.4. Loans In

Once a loan is agreed, an entry and loan form are completed. The loan form will clearly identify the owner, the length of the loan, a brief condition report (a more detailed condition report can be attached to the form) plus security and environmental factors to be taken into account (e.g. light and humidity levels). A valuation is also agreed upon between the museum and the owner. The museum will ensure that the item is covered by museum's insurance cover for the period it is in its care. This includes insurance of the item in transit if the museum arranges transportation of the item.

The maximum length of time that the museum will accept a loan is one year. Three months before the end of the loan, the loan is reviewed and the owner contacted to arrange its return or extension of the loan. A new loan agreement can subsequently be agreed.

The loan form should act as an over view of the loan. Any extra conditions to the loan should be noted and attached to the loan form and the number of additional pages noted on the front of the loan form

3.5 Loans out

Once a loan is agreed, an exit and loan form are completed. The loan form will clearly identify the borrower, the length of the loan and a condition report. A valuation is also agreed upon between the museum and the borrower. The borrower will ensure that the item has Insurance cover for the period the item is in their care. (This includes insurance of the item in transit) and documentation should be seen by a representative of Surrey Heath Museum

The maximum length of time that the museum will loan an item is one year. Three months before the end of the loan the loan is reviewed and the borrower contacted to arrange its return. A new loan agreement can subsequently be agreed. If a continuation of the loan is agreed after the year, a member of the museum staff will update the condition report and visit the item in situ.

The loan form should act an over view of the loan. The number of additional pages should be noted on the front of the loan form

3.6 Object Exit

For items permanently leaving the collection or for a fixed term loan, an exit form is completed. Items will be disposed of if;

- They are in poor condition or infested,
- There is a dispute over ownership and documentation confirming ownership is not in place.
- An object does not fit into the museum's collecting policy (1996 to 2001) or there are a number of items the same (*).

(* Attempts will be made to contact the original donor to return the object, if they are not contactable the object will be offered to the wider museum environment (via the Museums Journal) or used for educational purposes. If they are contactable and do not wish the item returned they will need to confirm that they are happy for it to be disposed of, offered to other institutions or used for educational purposes.)

4.0 Labelling and Marking

The museum follows the procedures outlined by the Collections Trust when labelling and marking objects.

http://blog.lib.umn.edu/sbielak/bielak_mirror%20museum/Labelling_and_Marking_Museum_Objects.pdf

Currently we mark the objects in the collection with their unique museum number using the following methods;

Barrier method - for items with a non-porous surface we use a barrier of varnish (paraloid 76). We write on the number using a permanent ink (a rotring pen) followed by a further protective layer of paraloid 76.

For textiles we use permanent ink on a cotton tape sewn onto the item.

For smaller items or items with a flakey surface items are place in a box with a tyvek label attached.

For items on paper a 2b pencil is used.

Photographic negatives are packed in a secol sleeve and numbered on the secol sleeves using self-adhesive labels.

All items have a museum label tied onto them for ease of identification.

5.0 Date of Review

March 2014

6. Appendices

- **Acquisition and Disposal Policy**
- **Museum Registration Details**
- **Collection Management Plan**
- **Location of Objects and Documentation**