An Introduction to the Collections Management Policy Toolkit

Conservation Center for Art & Historic Artifacts

In a typical year:

• Preservation Services specialists complete 50+ survey projects

• Approximately 60 CCAHA-sponsored workshops, conferences, webinars, and training sessions are presented

• The Digital Imaging Services staff digitizes thousands of pages of fragile archival documents, books, and photographs

• Conservators assess and treat more than 6,000 individual artifacts, from over 400 clients

• Housing & Framing Services house approx. 75% of the artifacts treated (folder, sleeve, box, mat and frame, or sealed package)

BUILD A CUSTOM COLLECTIONS MANAGEMENT POLICY FOR YOUR COLLECTION

The CMPToolkit guides you step-by-step through the process of creating a Collections Management Policy, using a template developed with help from top professionals in the field. Get started by creating your free account today.

ℹ Learn More

Why Policies and Procedures?

❖ Support Standards / Best Practices

❖ Formalize

❖ Consistency

❖ Guidance

❖ Assign Responsibility

Collections Management Policy

What is a Collections Management Policy (CMP)?

A series of policies that govern what a collecting organization does to grow and care for their collections and make them available to the public.

Includes:

- ❖ Mission Statement/ Statement of Purpose

- ❖ Acquisition and Accession

- ❖ Deaccession and Disposal

- ❖ Documentation

- ❖ Loans and Temporary Custody

- ❖ Collections Care

- ❖ Access and Use

- ❖ Risk management

- ❖ Intellectual Property

- ❖ Ethics

Why CMPs?

Connecting to Collections Statewide Surveys ...

❖ Preservation Plan for PA – 2008

70% stated that assistance with "development of preservation and collections management guidelines" would be "useful" or "very useful"
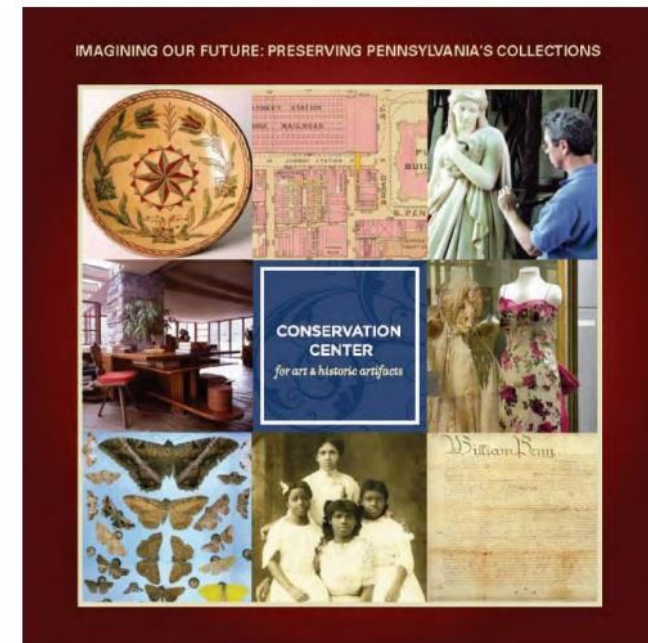
❖ NJ survey – 2009

40% of institutions had no CMP

❖ WV survey – 2010

39.25% of institutions had no CMP

CONNECTING TO COLLECTIONS PENNSYLVANIA

A FIVE-YEAR PRESERVATION PLAN FOR PENNSYLVANIA

IMAGINING OUR FUTURE: PRESERVING PENNSYLVANIA'S COLLECTIONS

CONSERVATION CENTER
for art & historic artifacts

Need in the field

❖ Communicate importance of collections care and management to administration and Board

❖ May be required as attachments for grant applications

❖ Required for accreditation

❖ May be important for negotiating loan agreements with other organizations

❖ *… but … m*any institutions had inadequate, outdated, incomplete, and/or nonspecific (templated) policy documents

Philadelphia Stewardship program

Introduced "Track IV" in 2009

Our learning experience writing CMPs

- ❖ Many institutions had inadequate, outdated, incomplete, and/or nonspecific (templated) policy documents

- ❖ Observed the decision-making steps most likely to stall the process

- ❖ Policy sections that are most universal in nature

- ❖ Importance of customizing policies to support the unique needs of particular collections and institutions
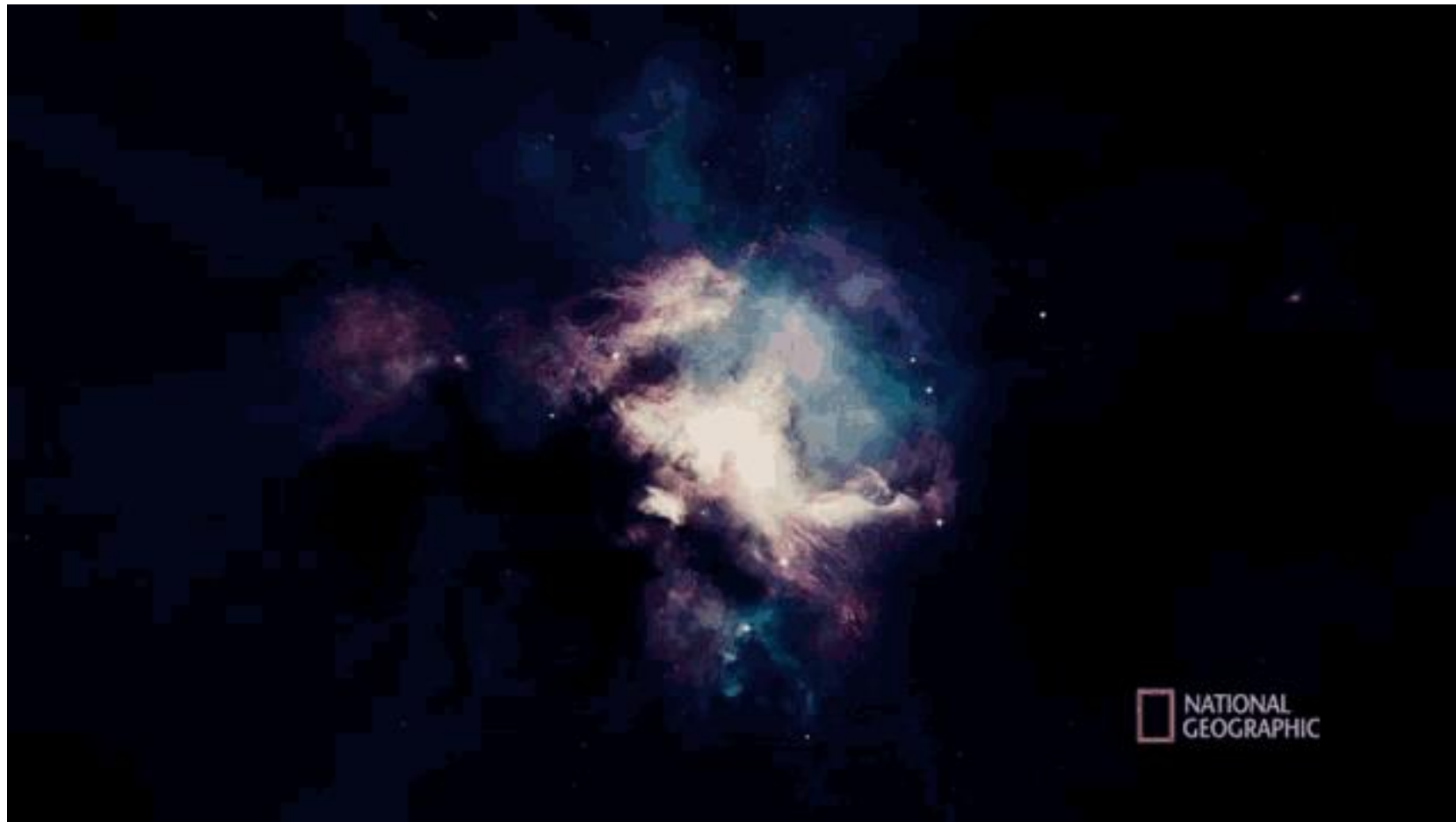
Inspiration for the toolkit

Collaboration with Yikes

Advisory committee

❖ Convened in-person February 2019

❖ Rebecca A. Buck, Jean Gilmore, John Herbert, and John Simmons

❖ Topics covered: defining the user; sections to include; preliminary SWOT analysis of the toolkit in concept

2020 …

Reassembling Advisory Committee

❖ Virtual meetings

❖ Iterative series of developing and refining questions and branching responses

❖ Lots and lots of internal testing

Beta testers

❖ 15 different types of institutions representing different potential users

❖ Testing and extensive feedback

And now a walk through!

Frequently asked questions ...

❖ What kind of organization(s) is this geared towards?

The CMPToolkit is geared towards small and mid-sized institutions without an up-to-date CMP. It is designed for ease-of-use regardless of staff background or experience in policy development.

❖ Can this be used to update or revise an old CMP?

Yes, although it may be more or less useful depending on how much updating is required.

❖ Our organization has a complex structure and/or unique collection needs that aren't addressed in the questionnaire; can we still make use of this tool?

Yes! With the ability to edit your final policy, any specific needs or areas where more information is needed can be added after completion.

❖ Our organization doesn't have a certain policy written yet; can we skip that question for now? Also: a particular section doesn't apply to my organization; can I skip it?)

All required questions need to be answered before you will be able to view and download your final policy. Any question marked as required is one we believe is crucial to having a thorough CMP that meets professional standards. You can always save or work on other sections if a question is holding you up, but we recommend any missing answers be addressed before you can consider your policy complete. That being said, some questions or sections may simply be irrelevant to your organization and can be removed when editing.

Questions?

Contact us at **dfeige@ccaha.org** or **ashaffer@ccaha.org**