

# *GUIDE TO MANAGING HISTORICAL SOCIETIES*

## **Developing a significant collection**

### **Collection management**

#### **Collections held by societies**

Most historical societies (but not all) look after a collection.

- Some societies do not have their own collection but use a local history collection held by another organisation such as a public library.
- Some societies collect research material but store it at the premises of another organisation such as a public library.

But the more common scenario is for a society to be responsible for the safe housing and management of the collection for the local community.

There are many types of local history collections.

- The collection held by a society may be a research collection including books, documents, photographs, maps, ephemera, newspapers (whole or selected articles), pamphlets, audio visual material etc – all containing information about the local area or special interest of the group.
- The collection held by a society may constitute a small museum focusing on collecting a variety of artefacts relating to the local area or special interest of the group.
- The collection held by a society may include both a research collection and a museum collection.

Historical societies established in the mid 1960s frequently collected both research material and artefacts. The 1960s was a period of change in many areas with land previously used for farming being subdivided for housing, industry and other development. Farm equipment used for many years in the region, furniture and household items were often donated to the new historical society for its museum collection.

The trend for recently formed groups is to concentrate on establishing a research collection.

Organisations providing advice on the care and management of records and collections include:

- Royal Historical Society of Victoria – [www.historyvictoria.org.au](http://www.historyvictoria.org.au)
- State Library of Victoria – [www.slv.vic.gov.au](http://www.slv.vic.gov.au)
- Public Record Office Victoria – [www.prov.vic.gov.au](http://www.prov.vic.gov.au)
- Museums Australia (Victoria) – [www.mavic.asn.au](http://www.mavic.asn.au)
- National Library of Australia – [www.nla.gov.au](http://www.nla.gov.au)

#### **Collection policy**

All societies with collections need a collection policy. The Collection Policy provides the philosophy relating to the management of the collection by the society and specifies the types of material the society will collect (and not collect).

The collection policy specifies why, what, how, where and when the society collects items, as well as how and why items may be deaccessioned from the collection. The collection policy identifies who may use the collection items and how the collection is used and cared for.

On the Museums Australia (Vic) website – [www.mavic.asn.au/services/resources](http://www.mavic.asn.au/services/resources) there is a template to help groups create a collection policy.

The Collection Policy can be divided into sections:

- The Mission Statement or Statement of Purpose of the society – a succinct statement defining the existence of the society
- A Collections Statement describing what the society collects. It outlines the major themes that define your collection. This statement might include:
  - Timeframes
  - Geographic boundaries
  - Industries
  - Important events
  - Types of items collected

The collection statement might also define what the society does not collect. A short list of significant items with a statement of why each listed item is significant can be included in the Collections Statement

- A statement about the policy for acquisition of collection items
- A statement about the policy for deaccessioning of collection items
- A statement about the policy for the storage of the collection
- A statement about the policy for duplicates in the collection
- A statement about the policy for collection use including public access to the collection
- A statement about the policy for lending collection items or borrowing items for the collection

There should also be a statement concerning reviewing the policy – how regularly the policy is to be reviewed and the date when policy was created or last reviewed.

A Collection Policy allows members of a society to review the collecting practices of the organisation, where a collection already exists, or to make decisions on what and how the society will collect material if starting a new collection.

Considerations for discussion when preparing or reviewing a Collection Policy include:

- What items does the society want to collect?
  - The society might decide to only collect research material and not collect artefacts
  - The society might decide to collect only items for which the provenance is known – what is the history of the item?
  - The society might decide to collect only items relating to the local area
- What are the major strengths of the collection?
- What are the major weaknesses of the collection?
  - Identify specific areas where the collecting could be targeted

- What are the major subject themes relating to the local area?
  - To what extent are these themes to be reflected in the collection and in the Collections Policy?
- Are other organisations already collecting the material?
- Housing of collection items – Does the society have the facilities to house an item?
  - For example, if the society is offered a truck does it have the facilities to garage it?
- Does the society have sufficient funds and resources to care for the item
  - Providing archival standard boxes and bags for the safe storage of items can be costly
  - In some cases should items be accepted only if additional funding is provided by the donor to adequately house the new acquisition?
  - Will the society accept items from another collection?
- What will the society do with duplicate items?
  - What will the society do when offered a duplicate of an item already in the collection?
- Copyright
- Will the society only accept donations or are there cases where targeted items will be purchased?
- Ascertaining ownership of item offered to the collection

Examples of generic collection policies and procedures for both museum collections and research collections are provided. A society with both types of collections might have separate policies and procedures for each type of collection or one policy covering both collections and separate procedures for each collection.

### **Collection procedures**

A series of procedures describing specific actions required to implement the Collection Policy are also required. Procedures are action documents outlining the steps involved to accomplish a task and are linked to their relevant policy. For example, procedures relating to a Collection Policy would include:

- Acquisitions Procedure
- Cataloguing Procedure
- Deaccessioning Procedure
- Inwards Loans Procedure (if applicable)
- Outward Loans Procedure (if applicable)

Written procedures ensure that any member of a group needing to carry out a task will do so following agreed guidelines. Members of societies usually discover that once they become used to the idea of documenting procedures for the major collection tasks they also prepare procedures for other tasks undertaken within the society. The policies and their related procedures can be kept in a Procedure Manual – either in paper copy or in a computer file accessible to members.

Each procedure should include a statement referring to the policy to which it belongs and should also include a statement concerning reviewing the procedure – how regularly the procedure is to be reviewed and the date when procedure was created or last reviewed.

Each procedure lists the forms required to carry out the procedure.

Forms may include:

Potential Donation Form

This form includes

- details of the owner donating the item
- details of the item (physical description of item)
- details showing significance of the item for the collection)
- donor declaration that they understand conditions of deposit.
- a section for office use including date item received, condition of item, and signature of person receiving the item.

There should be two copies of this form – one kept by the society and one given to the donor.

Where societies collect a variety of items there may be Potential Donation forms for different parts of the collection. For example there may be a Potential Donation Form created specifically for Objects or a Potential Donation Form created specifically for Photographs.

Particularly for photographs, but also for manuscripts and other unpublished material, there should be provision on the Potential Donations Form regarding the copyright of the item and whether permission is given for copying the item in a range of formats.

This form is kept with the donation and set aside for the Acquisitions Committee to discuss whether or not to accept the item.

Outward Loans Form (if appropriate)

From time to time a society might lend on short-term loan items for display, research or copying purposes. If this occurs the society should have documentation to ensure the safe keeping of the item.

Inwards Loans Form (if appropriate)

From time to time a society might accept on short-term loan items for display, research or copying purposes. If this occurs the society should have documentation to protect itself from any liability it may incur.

Other policies relating to collection are:

- Preservation / Conservation Policy
- Access Policy
- Exhibition /Display Policy

Each of these policies will also have one or more procedures enabling the implementation of the policy.

**Collections (Acquisitions) Committee**

The Collections or Acquisitions Committee should assess potential donations for a society. A decision is made on whether the item meets the criteria of the society's Collection Policy and whether the donation will be accepted.

Items not accepted are returned to the donor or disposed of according to the criteria described on the Potential Donations Form.

The donor should be notified that the item has been accepted or has not been accepted.

### **Accessions Register**

When an item is accepted into a collection it is given an accession number and details written in an Accessions Register. This information has traditionally been recorded in a book but acquisition information can also be recorded in cataloguing databases.

Information included in an Accession Register is normally the accession number, date of donation, name (and address) of donor and details about the item (author, title and publisher for a book). There should also be a column for a date and or details in case an item is deaccessioned.