

GUIDE TO MANAGING HISTORICAL SOCIETIES

Managing the Organisation

Part 2 – Policies and Procedures

Increasingly, community groups are being requested to prepare policies and procedures for their organisation.

A policy may be described as a plan or course of action that describes the philosophy for undertaking the action. An example is a collection policy describing why, how, what and when items are collected (or not collected). One policy may have one or many procedures.

A procedure provides the guidelines for undertaking the action. Procedures describe, step by step, how the action is to be undertaken. The acquisition procedure therefore describes step by step what happens when a new item is purchased or donated and nominates the people (by position) who will carry out each task. The cataloguing procedure describes the steps required for cataloguing collection items. Both procedures would come under the banner of the collections policy.

Policies and procedures are important for the management of collections. It is important to create policies and procedures to enable members of community organisations to maintain continuity in the tasks undertaken and to establish that all members undertaking a variety of projects are doing so in a constructive way to benefit the organisation as a whole.

The creation of policies and procedures should involve all the members, especially those working in the area directly affected by the policy or procedure. The policy or procedure must apply to the organisation for which it is written. Generic policies and procedures do not necessarily work in all organisations.

Once an organisation has prepared and agreed to a set of policies and procedures it is important that the policies and procedures should be followed. If for some reason a policy or procedure (or part of a policy or procedure) is no longer applicable, it should be reviewed. There is really no purpose in an organisation having a set of policies and procedures if they are then ignored.

A policies and procedures manual should be developed, preferably in the form of a loose-leaf folder, so that it can be added to and updated or recorded in a database on a computer that can be accessed easily. This manual should be made accessible to all volunteers and be part of the volunteer induction process.

Policies and procedures should be reviewed regularly and updated as required.

The policies and procedures of the organisation should reflect the organisations compliance with federal, state and local laws, by-laws and regulations.

Some of the laws and regulations organisations need to be aware of when managing collections include:

- Copyright, moral rights and defamation
- Records management

- Managing volunteers
- Building regulations
- Managing heritage buildings and fabric
- Protection of built and moveable culture
- Financial management
- Insurance
- Occupational health and safety
- Working with hazardous materials
- Operation of machinery
- Market research
- Sale of food
- Working with children

Other relevant laws and regulations governing how organisations are managed include:

- Privacy
- Intellectual property
- Universal access
- Freedom of information
- Equal opportunity

General policies for managing organisations include:

- Management policy
- Occupational Health and Safety policy
- Volunteer policy
- Grievance policy
- Succession plan
- Privacy Policy
- Equal opportunity policy

Policies for organisations with a collection include:

- Collection policy including de-accession policy
- Preventative conservation policy
- Interpretation policy (or Exhibition policy plus Education policy)
- Access policy
- Disaster preparedness and response plan
- Research policy

Excellent resources are available to assist heritage organisations develop policies:

- *Collection Policies*: Museums Australia (Vic) Template for Collection Policy: <http://www.mavic.asn.au/resources/>
- *Museum Methods* – Developing a Collection Policy http://www.collectionsaustralia.net/sector_info_item/11
- *Interpretation Policy*: Museums Australia (Vic.) Template for interpretation policy: <http://www.mavic.asn.au/resources/>
- *Policies and Procedures*. VCOSS Manuals for Community Organisations. Melbourne 2007