# Royal Pavilion & Museums, Brighton & Hove

# Collections Management & Documentation Procedure Manual 2017

**Name of museum:** The Royal Pavilion & Museums

**Name of governing body:** Brighton & Hove City Council

**Date on which this policy was reviewed:** Spring 2017

**Date at which this policy is due for review:** no later Summer 2018

This 2017 version replaces RPM Documentation Procedure Manual originally written 2005, revised 2009 and again in 2013.

One revision was added in 2017 on Page 1.

Brighton & Hove
City Council

# Introduction

**What is this document?**
This Documentation Procedure Manual is a requirement 2.7 of the Accreditation Standard and the procedures detailed within it are written in accordance with SPECTRUM standards.

The manual is to give guidance to those responsible for the management of objects in the permanent collections to ensure the safe, secure and effective management of the objects in those collections. It also supports any training that may be given to volunteers, interns, placements who are with the service and working with object management. It also serves as a document outlining the variety of tasks carried out by teams within the service, especially the collections team but also the learning and programming teams and it is available to any member of staff within the service.

**Where is the manual kept?**
A hardcopy will be held at each site, and a digital copy can be accessed by all staff via a computer, read only copy which is saved on the Royal Pavilion & Museums shared X: Drive

**How was the manual produced?**
This manual was compiled January to April 2013 by Senior Keeper, Keeper of Local History & Archaeology, Richard Mark Le Saux and Curator (Collections Management), Katie Hobbs with the assistance from various Keepers, Curators and the Head of Collections, Interpretation & Learning, Sarah Posey.

**Are there meetings to communicate and support the use and development of the manual?**
Collections Meetings are held monthly to discuss any issues, developments across all areas of collections management, including additions or changes to this document. These are chaired by Senior Keeper, Keeper of Local History & Archaeology, Richard Mark Le Saux, and attendees are primarily Keepers, Curators and Assistant Curators. Other colleagues are invited as required.

Other meetings which support procedures are held monthly, these include:

- RPM Collections Development Panel
  - Acquisitions & Disposals are discussed and agreed monthly
- RPM Loans Panel
  - Loans In and Loans Out are discussed and agreed monthly
- The Keep Management Team Meeting
  - Collections management and operational issues relating to The Keep are discussed and agreed by partners on a monthly basis (tbc).

A list of the attendees, the agenda's and minutes for these meetings can be found on the X: Drive.

**What is the history of this manual?**
This manual builds on a previous incarnation developed between May–September 2005 by then Registrar, Jenny Hand and members of the Collections Management Group. The Collections Management group became defunct in November 2006, overall decisions on

policy and procedures now lies with the Head of Collections, Interpretation, & Learning with recommendations being presented from the Collections Meetings.

## <u>Object Entry Procedure</u>

**Documentation/Equipment Needed:**

- RPM Collections Documentation & Information Policy 2013
- RPM Collections Development Policy 2013
- Object Entry Form
- Oral History Consent Form/ Booth Museum Enquiry Form/ Booth Loan Form (as appropriate)
- Condition Report Form (3d or 2d as appropriate)
- Daybook (as appropriate)
- MimsyXG
- Label

**Basic Steps**

1. Read and understand the relevant section of RPM Collections Documentation & Information Policy 2013, and RPM Collections Development Policy (if appropriate) and the associated Terms and Conditions.

2. Be aware of the legal environment in which deposits may be accepted

3. Be aware of the SPECTRUM procedure which will inform you of the types of information to record about a deposit

4. Fill in the Entry form (ensure that the terms and conditions are understood by any parties involved in filling out the form)

   > Oral Histories will need Consent Form and a Data Form. Oral History deposits are recorded on the Oral History chart (a list of recordings to be accessioned). Object name/interviewee, date of acquisition/recording, physical description (minidisk etc).

   > The Booth Museum has separate forms for Enquiries and Loans In.

5. Fill in a separate 3d or 2d condition report if the deposit is an enquiry or loan in.

6. Assign an Entry number (or Accession number if the deposit was expected), Enquiry or Loan In number to the deposit. Create an entry record and catalogue record in MimsyXG. The MimsyXG entry record should be created in Acquisition, Entry or Loans Activities, as appropriate to the activity.

7. Additionally certain collections record object entry in a daybook;

   > World Art – Daybook for enquiries, expected and unexpected deposits for consideration for the permanent collection and loans in; Loans In also have a separate file.

Costume & Textiles – Daybook for enquiries, expected and unexpected deposits and loans in. Loans In also have a separate file.

Toys, Film & Media - Daybook for enquiries, expected and unexpected deposits.

Decorative Art - Daybook for expected deposits or un-expected deposits considered suitable for the permanent collection. Loans In are kept in a separate file.

Natural Sciences – Daybook for expected and unexpected deposits, Enquiry and Loans In books are separate.

Fine Art - Fine Art Stock Book for expected deposits or un-expected deposits considered suitable for the permanent collection. Loans In are kept in a separate file.

8. Label the object with the entry number or secure the blue copy of the Object Entry Form to the object. (If it's an object for the permanent collection and has been agreed at Collections Development Panel, follow the Object Marking and Labelling procedure.)

9. Record the Current Location, (and Store Location if appropriate) of the object on MimsyXG. The recommendation is to do this if the object is to be left unattended overnight. There are three secure cabinets for deposits arriving in the Local History & Archaeology department. Dead vertebrates (such as fur and wool) should be quarantined, or at a minimum securely wrapped in polyethylene, prior to entering galleries or storage areas.

9.

Enquiries
Carry out work and return object – go to Object Exit

Potential Accessions
Present the object to the Collections Development panel for approval. Accession object or return it to depositor depending on the outcome.

Loan in
Go to Loans In

## <u>Acquisition Procedure</u>

**Documentation/Equipment Needed:**

- RPM Collections Documentation & Information Policy 2013
- RPM Collections Development Policy 2013
- Object Entry/Transfer of Title Form
- MimsyXG

**Basic Steps**

1. Read and understand the Acquisition section of the RPM Collections Documentation & Information Policy 2013.

2. Read and understand the RPM Collections Development Policy and the associated Terms and Conditions.

3. Be aware of the legal environment in which objects can be acquired.

4. Be aware of the SPECTRUM procedure which will inform you of the types of information to record about an acquisition.

5. Ensure that an Object Entry Form exists for all objects entering the permanent collections, with a signature as proof of transfer of title.

6. Create a catalogue record and acquisition activity record on MimsyXG for all objects accepted into the permanent collections in accordance with the RPM Collections Development Policy. Records must be created to at least 'Core' standard (see field level help in the Object Authority Record Level field in MimsyXG) for all objects entering the permanent collections from June 2005.

7. Mark the object with a unique ID number (see field level help in the Object Authority ID/Acc No field in MimsyXG). The object should be marked in accordance with the Object Marking and Labelling Procedure.

8. If the donor wasn't present at time of donation, a copy of the Object Entry/Transfer of Title form should be sent to the donor with a letter thanking them for their donation.

## Object Marking & Labelling Procedure

### Documentation/Equipment Needed:

- RPM Collections Documentation & Information Policy 2013
- MimsyXG
- Marking equipment e.g. 2b pencil, pigma pen, white pen
- Labelling equipment e.g. acid free tags, paper, varnish, cotton tape

### Basic steps

1. Read and understand the relevant section on Object Marking and Labelling in the RPM Collections Documentation & Information Policy 2013 (supplement)

2. Be aware of the legal environment surrounding Object Marking & Labelling.

3. All labelling or marking of objects must be carried out using a reversible or temporary method. (see Object Marking & Labelling Guidance for further information)

4. All objects should be labelled with entry number/ accession number/ loan number at time of entry using a temporary method; e.g. acid free tag with pencil written number tied to or kept with the object

5. All items accepted into the permanent collection should be labelled with a more permanent reversible number when entering the collection.

6. Prior to the use of any identified methods for the temporary labelling of museum objects, the health and safety risks associated with the method will be assessed to ensure safe working practices are used at all times

7. During an audit or inventory, objects identified as having been accessioned but not labelled or marked, will be labelled or marked using a temporary method outlined in Object Marking & Labelling Guidance.

8. Each object should be examined carefully prior to labelling, and particular regard given to both the characteristics and the physical properties of the object before labelling. See Object Marking & Labelling Guidance document for further information on where and how to attach labels or mark an object.

9. Any changes to the method of object labelling will need to be agreed at Collections Meeting after discussion with a Conservator

## Cataloguing Procedure

**Documentation/Equipment Needed:**

- RPM Collections Documentation & Information Policy 2013
- MimsyXG
- Object Data Sheet

### Basic steps

1. Read and understand the relevant Cataloguing section of the RPM Collections Documentation & Information Policy 2013.

2. Be aware of the legal environment surrounding Cataloguing.

3. Be aware of the SPECTRUM procedure for Cataloguing.

4. When an object or group of objects is accessioned into the permanent collections create a catalogue record in MimsyXG within one month of the object or group of objects being presented at the Collections Development Panel meeting.

5. If MimsyXG is not available for any reason at the time of cataloguing, make sure all relevant information is recorded on an object data sheet and entered into MimsyXG when access to the system is next available.

## <u>Object Exit Procedure</u>

### Documentation/Equipment needed:

- RPM Collections Documentation & Information Policy 2013
- Object Exit form
- MimsyXG

### Basic steps

1. Read and understand the relevant Object Exit section of the RPM Collections Documentation & Information Policy 2013.

2. Be aware of the legal environment surrounding Object Exit.

3. Be aware of the SPECTRUM procedure for Object Exit.

4. Ensure that the exit of any object from the boundaries of the service has been approved by the Collections Development Panel, unless the object has been accepted in for Enquiry or Identification purposes.

5. Make sure that the proper arrangements have been made for the transportation of the object. (see Object Exit Guidance)

6. Fill out the Object Exit Form, ensuring that this includes a signature from the remover. If this is a courier a signature will also be required from the person or organisation to which it is being delivered.

7. Copies of the Exit Form are stored by the Keeper or Curator with overall responsibility for the collection to which the object belongs.

8. The new location of the object must be updated in MimsyXG by creating a new location activity record.

## Location and Movement Control Procedure

**Documentation/Equipment Needed:**

- RPM Collections Documentation & Information Policy 2013
- Movement Slips
- mimsyxg

**Basic steps**

1. Read and understand the Location and Movement Control section in RPM Collections Documentation & Information Policy 2013.

2. Be aware of the legal environment surrounding Location and Movement Control

3. Be aware of the SPECTRUM procedure for Location and Movement Control

4. When an object enters, exits, and is moved update the MimsyXG database with its current location.

5. An object in the permanent collection should preferably have its storage location recorded on MimsyXG, to ensure effective storage when not on display.

6. A Location/Movement Slip should be filled. Attach the blue copy to the object (this may not be appropriate if an object is going on display), leave the yellow copy in the space, place the white copy in a folder with the member of staff responsible for the object and use it to update the MimsyXG database.

## Deaccession & Disposal Procedure

**Documentation/Equipment Needed:**

- RPM Collections Documentation & Information Policy 2013
- RPM Collections Development Policy 2013
- Object Exit/Transfer of Title Form
- mimsyXG

**Basic Steps**

1. Read and understand the Deaccession & Disposal section of the RPM Collections Documentation & Information Policy 2013. (supplement)

2. Read and understand the RPM Collections Development Policy 2013 and the associated Terms and Conditions

3. Be aware of the legal environment in which objects can be disposed.

4. Be aware of the SPECTRUM procedure which will inform you of the types of information to record about a disposal.

5. Ensure that an Object Exit Form exists for all objects exiting the permanent collections, with a signature as proof of transfer of title, as appropriate.

6. Create a disposal activity record in MimsyXG for all objects to be disposed of in accordance with the RPM Collections Development Policy. Catalogue records for objects to be disposed of must be to at least 'Core' standard (see field level help in the Object Authority Record Level field in MimsyXG) for all objects exiting the permanent collections from August 2013. See Deaccession & Disposal Guidance for further information on documenting disposal.

7. If the final recipient isn't present at time of Object Exit, a copy of the Object Exit/Transfer of Title form should be sent to the recipient.

## <u>Audit Procedure</u>

**Documentation/Equipment Needed:**

- RPM Collections Documentation & Information Policy 2013
- Audit Guidance documents
- Object handlist (Crystal Report/Excel sheet)
- MimsyXG

**Basic Steps**

1. Read and understand the relevant Audit section of the RPM Collections Documentation & Information Policy 2013.

2. Be aware of the legal environment in which objects can be audited.

3. Be aware of the SPECTRUM procedure which will inform you of the types of information to record about an audit.

4. Read the Audit Guidance before carrying out an audit exercise.

5. As a result of the inventory project 2006-2009 RPM currently regards up to date locations as the main driver for carrying out audit exercises. As such it is sufficient to audit a sample selection of objects from one or more locations for an audit exercise. An information audit may be required for various reasons (see Audit Guidance for further details).

6. An audit sample can include both objects on display and in store. You should pick individual objects to audit where possible.

7. The audit exercise can be carried out in one of two ways. Either a handlist, created in mimsy and exported to excel or crystal to be printed out, can be used to carry out physical location checks on objects in store or on display. Or a list of objects in store or on display can be made and then cross referenced back to the information in the database.

8. To ensure object safety, staff safety and consistency of reporting across collections, a member of Curatorial staff, (or their delegated representative*) should be present during an audit where the following are checked;

   - Condition check of object
   - Updating labelling and marking of objects (see the Marking and Labelling Guidance)
   - Taking a digital image where one does not already exist (if legally possible) and follow the Reproduction Guidance for cataloguing and storing this image.

9. The audit can also be used as an opportunity to reassess the environmental, storage and security needs of objects provided that there is a suitably qualified or experienced person present during the audit.

10. Be aware when conducting an audit that resolution of some problems may require a partial or full collections or information inventory.

11. Be aware that before starting an audit it may be necessary to lock MimsyXG records for the objects being audited until the audit is complete.

12. During the audit:
    - Clarify that the object is in its correct location
    - Record the information collected during the audit into MimsyXG
    - Update or amend information on MimsyXG as required with any discrepancies. Discrepancies advice can be found in Audit Guidance.

13. Post-audit action:
    - Record the information collected during the audit into the Audit activity module on MimsyXG
    - Update or amend information with any discrepancies on relevant modules in MimsyXG as required. Discrepancies advice can be found in Audit Guidance.
    - Missing objects require immediate reporting to the Keeper/ Curator (if not present), and then escalated to Head of Collections , Interpretation and Learning; Security Officer, Duty Managers; Conservators and Historic Building Officers, as appropriate.

14. If the audit highlights a flaw in documentation procedures (e.g. inaccurate movement control resulting in objects being mislaid), the relevant procedure will be reviewed, revised or reinforced as required. It is then advisable to re-audit affected objects to ensure that the procedure is working effectively.

**\*Delegated representative** will be a Volunteer, Subject specialist, or member of Conservation or Historic Buildings Team, who is trained in Object Handling and has been given verbal or written instructions from the Keeper or Curator of the collection.

## Retrospective Documentation Procedure

**Documentation/Equipment Needed:**

- RPM Collections Documentation & Information Policy 2013
- RPM Collections Documentation Plan 2013
- RPM Forward Plan 2013
- MimsyXG
- Microsoft Excel
- Object Catalogue Sheet/Handlist
- Accession Registers/ Daybooks/ Index Cards/ Object History Files/ Catalogues (as appropriate)

**Basic steps**

1. Read and understand the relevant Retrospective Documentation section of the RPM Collections Documentation & Information Policy 2013.

2. Be aware of the legal environment surrounding Cataloguing and Retrospective Documentation.

3. Be aware of the SPECTRUM procedure for Retrospective Documentation

4. Read and be aware of RPM Forward Plan and the RPM Collections Documentation Plan 2013.

5. RPM's collections management and documentation system is MimsyXG, and should be the primary tool used to establish accountability and access to objects and collections. All retrospective documentation should be entered directly into MimsyXG where possible.

6. If there is no access to a computer, the network and therefore MimsyXG use an excel spreadsheet template. The spreadsheet should be upload or entered onto MimsyXG after its completion.

7. If there is no access to a computer or laptop, then use hardcopy cataloguing sheets, and enter the data directly onto MimsyXG after completion of data gathering.

8. To enhance object catalogue records, attribute acquisition information and to reconcile inventoried temporary numbered objects research will be required. This may involve consulting a Subject Specialist, previous Curators, and researching the object in hardcopy documentation such as Accession Registers, Daybooks, Index Cards, Object History Files and published Catalogues (as appropriate).

9. Review progress on the overall improvement in the quality of information on a regular basis.