

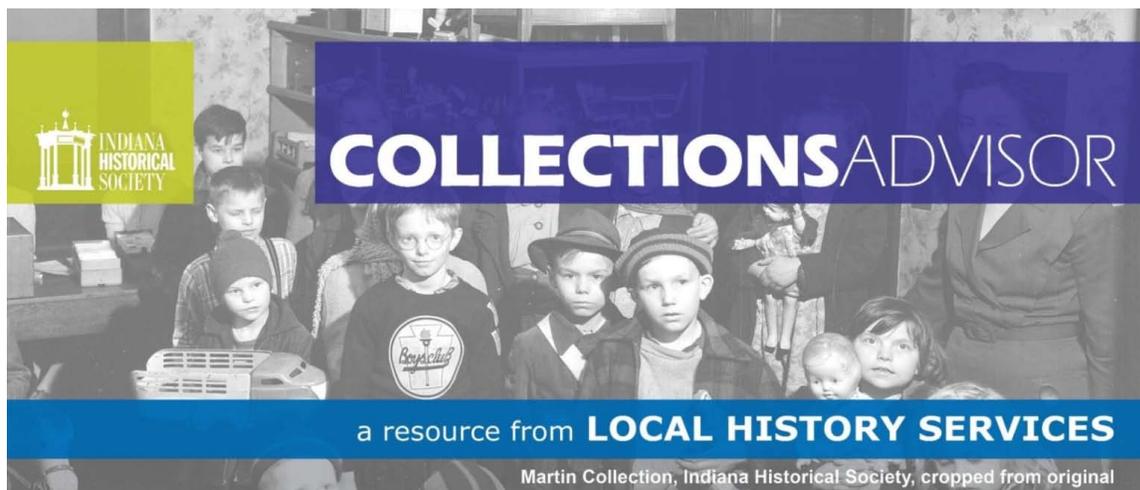


Share this Page:

powered by



This publication is a service of the [Hoosier Heritage Alliance](#)  
Connecting to Collections project.



Issue 23, September 2013

## Components of a Collections Management Policy

By Tamara Hemmerlein, Local History Partners coordinator  
[Indiana Historical Society](#)

A good collections management policy is important for any collecting institution. It provides guidelines for why the institution collects, what the institution collects and how the institution handles its collections. It is the foundation for good collections stewardship.

A collections management policy should be developed to fit the needs of each institution and may include but is not limited to the following components:

- Institutional mission statement – A mission statement tells the purpose of the institution, shows the path of the institution and acts as a guide for its operations and decision-making.
- Collections committee – These are the folks who are empowered to make decisions about the collection and recommendations to the board of directors. The committee should include stakeholders from inside and outside of the institution who can make objective and thoughtful decisions based on the institutional mission and the collections management policy. This component should include guidelines for who can serve on the committee and how the committee makes decisions.
- Scope of collections – A scope of collections statement explains what items will be collected. It sets the limits for the collection and guides decisions about acquisitions.
- Types of collections – Collecting institutions can have many types of collections including but not limited to permanent, educational and research. Various types of collections may have different guidelines about use and



public access. The differences should be addressed by the collections management policy.

- Acquisitions – Institutions acquire their collections in many ways. This section should address the ways in which objects are acquired, the criteria for acquisition and the specific procedures associated with acquisitions.
- Accessioning – There should be a standard procedure for accepting items into the collections. This component of the collections management policy includes the steps in the accessioning process including information about necessary paperwork, collections records and accession numbers. Ownership of items and procedures for acquiring clear title are part of the accessioning process.
- Deaccessioning and disposal – Sometimes it's necessary to remove items permanently from the collections. Deaccessioning should be undertaken in a thoughtful and deliberate manner. There should be clear ethical guidelines for making a decision about deaccessioning. It is important to address the acceptable methods and any ethical considerations related to disposing of items from the collections.
- Loans – This component outlines both the outgoing and incoming procedures for loans from and into the collections. It explains appropriate lenders and borrowers as well as how the items will be treated while on loan.
- Collections care and preservation – Collecting institutions have a responsibility to care for the items in their collections. The collections management policy should state how the items will be cared for and preserved. This may include appropriate storage methods, materials that are used for storage and information about cleaning around items.
- Conservation – Occasionally it's necessary to have collections items conserved – professionally repaired, cleaned, stabilized or a combination of the three. A collections management policy should include information on how conservation decisions are made.
- Exhibits – Collections items are frequently used in exhibits. The policy gives basic guidelines on appropriate exhibit procedures. The guidelines may include a list of acceptable exhibit materials, lengths of time certain items or types of items may be exhibited, and who can make decisions about exhibiting items.
- Collections access and use – This component addresses public access and use. It can include procedures to follow when someone asks for access to an item. It states what kind of access and who can access which types of collections. This component may also include the type of security or oversight that is provided when someone has accessed collections items.
- Policy review and revision – It's a good idea to include a provision for how often the collections management policy is reviewed and what the revision process is. The institutional mission may change requiring a change in collections scope. The physical space may change which may require changes in care and access to the collections. Professional standards and practices may change. Institutions need to be able to revise

their collections management policies when change happens.

- Glossary – A glossary is helpful for folks both inside and outside of the institution. It gives everyone information about vocabulary that is specific to collections or even to a particular institution.

**Resources:**

[American Alliance of Museums](#) – Collections stewardship

[American Association for State and Local History](#) – Technical Leaflets

[American Library Association](#) – *Guidelines for Establishing Local History Collections*

[Connecting to Collections Online Community](#) – Collections related webinars and discussions

[Indiana Historical Society](#) – *Collections Development and Acquisitions Policy*

[Indiana Historical Society](#) – Lending Resource Center

[Minnesota Historical Society](#) – *Building Your Collections*



This publication from the Indiana Historical Society is a service of the Hoosier Heritage Alliance. This project is made possible by a grant from the U.S. Institute of Museum and Library Services.

**This is a free publication. Anyone may subscribe.**

Collections Advisor is provided for the benefit of local historical societies and museums throughout Indiana. It is emailed to a subscriber list maintained by the [Local History Services](#) department of the Indiana Historical Society, 450 W. Ohio St., Indianapolis, IN 46202, (317) 232-1882.