

Location and movement control

Definition

Keeping a record of where all the objects in your care can be found, and updating the location each time an object is moved.

Scope

As well as recording when objects move in and out of your museum you should also keep track of them within the museum too.

For this you will need to have an agreed system of naming all the buildings, and rooms within them, where your objects might be (eg stores, galleries and conservation labs). This procedure also records environmental conditions within these spaces, so you can be sure they are suitable for the objects kept in them.

Within each space you should be able to record the exact location of each object with appropriate precision (eg specific boxes, shelves, drawers and display cases).

Following this procedure promptly keeps your location records up to date, which is the key to being accountable for your collections. Ideally, your system will also record where objects have been located in the past. This can be useful if, for example, you notice pest damage or some other change in an object's condition and you need to investigate possible causes.

In many cases moving museum objects can be highly complex, especially when transporting them across international borders, and you may need specialist advice.

This is a Spectrum primary procedure. UK museums must meet the standard set out below to fulfil the requirements of the Museum Accreditation Scheme.

The Spectrum standard

You should have a **policy** on moving objects within your museum and on recording the location of your objects whether in the museum or elsewhere. This could either be a standalone document or part of a wider collections management policy. Either way, in deciding your policy you will most likely need to consider these questions:

- How will you keep object location records up to date at all times?

- How will you audit this?
- Are there times when objects may be moved temporarily without updating their location records?
- How you will keep location and movement records appropriately secure and confidential?
- How you will ensure that objects are not moved into unsuitable locations?
- Who can view and edit location and movement records?
- Who can request and approve the movement of objects around your museum?
- Who can move objects around your museum?
- Are there restrictions about when objects may be moved (eg not when visitors are around)?
- When will you undertake your own transport and when will you use external specialists?
- When should a courier from your museum accompany objects in transit?
- What standards of care will you apply to objects in transit, and are there any times when these might be varied?
- Who is responsible for transport costs in different scenarios (eg with loans the borrower normally pays)?

You should also have a written **procedure** that explains the steps to follow when moving objects. Spectrum's suggested procedure is a useful starting point, but however you do it, your own procedure should meet the following minimum requirements:

Minimum requirement	Why this is important
You have a system of recording all locations where objects are displayed or stored within your museum.	You can pinpoint the specific location of an object quickly and easily. You can note locations that are not suitable for certain kinds of objects.
You have the records needed to monitor whether agreed environmental standards are being met.	You can take action if the relative humidity in a store is too high. You do not display a watercolour painting in too much light.
You record every movement of an object, including the date moved, and change the location record in line with your policy.	You know at all times where every object is. You do not waste time hunting for objects that have been moved but not updated in your location records.

Minimum requirement	Why this is important
You can access location information by object number and location name.	You know, at all times, what is in each of your exhibition spaces and stores, and where every object is.
You record who has moved objects (and who authorised those moves if required).	Named individuals are accountable for moving objects. Objects are not moved without authorisation.
You have as full a history of objects' previous locations as practical.	You can compile a list of all objects in a location at a particular time, which might later be needed for security or conservation reasons.
You assess any risks of moving objects (both to the objects themselves and to people) and, where needed, have a written plan to mitigate them.	You do not cause an accident through lack of planning. You can show you were not negligent should anything go wrong.
You have appropriate insurance or indemnity cover in place before transporting objects, particularly in the case of borrowed objects.	You do not risk financial liability should anything go wrong.

Suggested procedure

Identifying and describing locations

Give each display and storage location a unique name or number.

Create a detailed record describing each location you use. It is useful to have annotated store and gallery plans. Assign a unique name or number to each display and storage location:

Location information

- **Location reference name/number** (use a standard term source).

Record key information about each location.

Record where necessary information about each location, including the following:

Location information

- **Location type** (use a standard term source).
- Address (if separate from your main site) - **Location address**.
- Environmental conditions:
 - **Location condition note**.
 - **Location condition note date** (use a standard format).
- Security details - **Location security note**.
- Access details - **Location access note**.

Maintain your location system.

Maintain your location records, making changes to them when needed (eg new storage and display location, and the closure of stores, exhibitions and displays).

If applicable, record environmental data (eg temperature and relative humidity) for specific locations:

Location information

- **Environment measurement type** (use a standard term source).
- **Environment measurement value**.
 - **Environment measurement value unit** (use a standard term source).
 - **Environment measurement value qualifier** (use a standard term source).
 - **Environment measurement date** (use a standard format).

Recording locations of objects

Record the location of all objects.

Record the location of all objects. For each include:

Object identification information

- **Object number**.

Object location information

- Its **Current location**. This should be a **Location reference name/number** (see above).
- The date it first was at that location - **Location date** (use a standard format).
- **Normal location** (if relevant, as not all museums assign their objects a normal location). If used, this should be a **Location reference name/number** (see above).

There should usually be only one place in your documentation system to record an object's location, as this ensures consistency and accuracy.

Moving objects

Object moves usually happen during the course of following another Spectrum procedure.

Obtain and record authorisation for all moves.

Following your policy, obtain and record appropriate authorisation for all moves, internal or external:

Movement information

- A reference number for the move - *Movement reference number*.
- *Movement authoriser* (use a standard form of name).
 - *Movement authorisation date* (use a standard format).

In smaller organisations, the person moving an object may be the same as the person authorising the move.

Check the objects' condition to make sure they are fit to be moved.

Go to, and return from, *Condition checking and technical assessment*.

Check whether there are any specific risks or recommendations associated with handling or moving the objects.

Check the relevant catalogue records for notes of any hazards posed by the objects, and for any handling recommendations (eg wear gloves) or packing recommendations (eg bespoke foam support), or other specific needs:

- *Display recommendations.*
- *Environmental recommendations.*
- *Handling recommendations.*
- *Packing recommendations.*
- *Security recommendations.*
- *Special requirements.*
- *Storage recommendations.*

See **Note 2** for additional guidance on risks.

Find out whether there are any access problems anywhere along the route and assess any handling issues or other risks.

You should establish whether there are any access issues at the collection or delivery destination (eg steps, tight corners or restricted access at certain times). Also assess any handling issues (eg will specialist handlers or equipment be needed?) Agree the route with all the parties involved.

Arrange any conservation or packing needed to make the objects safe for the move.

Even moving objects around your museum may require conservation work and bespoke packing. Objects being transported will need suitable protection from environmental changes or vibration during the trip. Take specialist advice from a conservator if needed.

Go to, and return from, ***Collections care and conservation***.

If no transport involved, move objects (then go to 'Update object location records').

Prepare the object for the move in the light of the condition check and any associated risks or recommendations.

If transport is involved, establish and agree the most appropriate means.

Influences on the decision include:

- Your policies.
- The size and weight of the packed objects.
- Cost.
- Legal restrictions (eg items that may not be transported by air).
- Availability of transport routes.
- Insurance or lenders' requirements.
- Whether a courier is required. ('Courier' in this context means a trained person, often from a lending museum, who accompanies objects throughout their journey and oversees the handover.)

It may sometimes be appropriate, and cost effective, to transport robust, low-value items by recorded-delivery post, a general courier company, or public transport. Within the country, your museum vehicles (or those of staff or volunteers) may be an option for these. For higher-value objects, and certainly if transporting objects across international borders, you may need specialist museum shipping agents. (See **Note 3** for guidance on using shipping agents.)

If the objects do not belong to you, you should always get the agreement of the owner.

Once confirmed, circulate a briefing note on the arrangements to the people who will be involved (eg curator, conservator, security and technical handling staff).

File the authorisations and briefing note and record the **Document location** in the relevant object records so you and others can find them in future.

Arrange insurance or indemnity for objects being transported.

Arrange insurance or indemnity as appropriate, according to your policy.

Go to, and return from, **Insurance and indemnity**.

Prepare appropriate documentation to accompany objects being transported.

Prepare appropriate documentation to accompany objects being transported, such as receipts, customs and insurance documents, and unpacking instructions.

File copies and note the **Document location** in the relevant object records so you and others can find them in future.

Transport objects, and then confirm their safe arrival.

Once the objects have arrived at their destination get a delivery receipt and, if appropriate, a condition report to confirm that they were not damaged in transit. If you have sent a museum courier, they should inspect the objects on arrival.

Go to, and return from, **Condition checking and technical assessment**.

File copies and note the **Document location** in the relevant object records so you and others can find them in future.

Update movement and object location records.

Record the following information as soon as an object has been moved, the:

Object identification information

- **Object number**.

Movement information

- A reference number for the move - **Movement reference number**.
- Date of move - **Removal date** (use a standard format).
- Person carrying out the move - **Movement contact** (use a standard form of name).
- Signature of person accepting custody of the object.
- Reason for move - **Movement reason** (use a standard term source).

- Additional information about the move as required - **Movement note**.
- If relevant, the date the object will return to its normal location - **Planned removal date** (use a standard format).

If transport was used during the move then record:

- Person accompanying the objects during transport - **Organisation courier** (use a standard form of name).
- Person or organisation carrying out the transport:
 - **Shipper** (use a standard form of name).
 - **Address**.
 - The contact person for the Shipper - **Shipper's contact** (use a standard form of name).
- Any other information about shipping an object, including details of the transit requirements - **Shipping note**.

If you wish to know where an object was in the past, for each old object location, record:

- **Previous location**. This should be a **Location reference name/number** (see above).
 - **Previous location begin date** (use a standard format).
 - **Previous location end date** (use a standard format).

Object location information

- Its **Current location**. This should be a **Location reference name/number** (see above).
- The date it first was at that location - **Location date** (use a standard format).
- **Normal location** (if relevant; not all museums assign their objects a normal location). If used, this should be a **Location reference name/number** (see above).

The above information may be recorded on a separate movement recording form. If so, the information should be transferred as soon as possible to the master location record.

Return to the linked procedure that prompted the move.

Guidance notes

Note 1: Location and movement records

Location records

These can include:

- **Entry records** (such as a Collections Trust object entry form). It is good practice to record the first location of an object when it enters the museum (eg Collections Manager's office, Enquiries cupboard).
- **Catalogue record.** This is usually contained within a digital collections management system, and is usually the record of an object's more permanent location. For a permanent location it is usual to follow your museum's conventions for recording locations (eg Room X, shelf Y, box Z).
- **Location lists.** These may be useful when, for example, an exhibition is being created, and occasionally organisations will attach a list of the objects to the outside of the box, or on a shelf. Location lists can be excellent temporary measures. However for permanent locations it is simpler and more efficient to only record permanent locations centrally in one place, which is usually the catalogue record.

Object movement tickets

Pre-printed object movement tickets are available from the Collections Trust. These consist of a triplicate carbon ticket, which is written on in pen when an object is moved, describing who has moved the object, why, where the object was moved from, and where it has gone. When using these tickets:

- The top copy (white) is left in place of the object.
- The middle copy (yellow) is placed in a temporary locations file in object number order, from where it is used to update the most permanent record of locations, usually the catalogue record.
- The bottom copy (card) is tied to the object.

When the object is returned to its permanent location all parts of the ticket should be thrown away.

Other methods of movement

Movement may also be managed by systems that are semi-automatic such as barcodes or RFID (Radio Frequency Identification), taking into account the care and safety of the objects. These will produce their own digital records.

Note 2: Risk assessment

As part of its overall approach to health and safety, your museum should identify the potential hazards of objects, and define and describe the safe practices required for storage and handling. This will include protective equipment to be worn when moving objects.

The risk assessments will take into account relevant legislation that may apply to specific types of objects (eg concerning firearms or hazardous substances). The risk assessment will include:

- Identification of the hazard.
- Who is at risk and how (eg the person moving an object).
- An evaluation of the severity and likelihood of a risk (eg trivial, moderate, intolerable).

As well as the report resulting from the risk assessment of a collection, a note should be placed in the object's record with regard to:

- Recommendations for its handling.
- Recommendations for its storage.
- Details of any potential hazards to people or other objects.

Documentation systems and procedures should encourage the recording of all such information, including where relevant the size and weight of the complete object and of its component parts. This documentation should always be referred to before any part of an object is moved.

Note 3: Using shipping agents

Refer to your policy regarding contracting external suppliers and follow the required procurement steps. Supply the agent with the following information:

- Details of the objects to be moved, their destination, the reason for the move and desired dates.
- Any known areas of difficulty, such as access, handling restrictions, weight loading.
- Specify whether any insurance or indemnity covers the transport and any special conditions.
- Any restrictions under CITES or hazardous materials regulations.
- Flag up the possibility of a site visit for agent to assess access, staffing, vehicle and equipment requirements, and method statement.

If the objects are travelling across international borders, the agent should be responsible for clearing customs, obtaining any licences needed (eg CITES), and complying with relevant laws (eg aircraft security regulations).

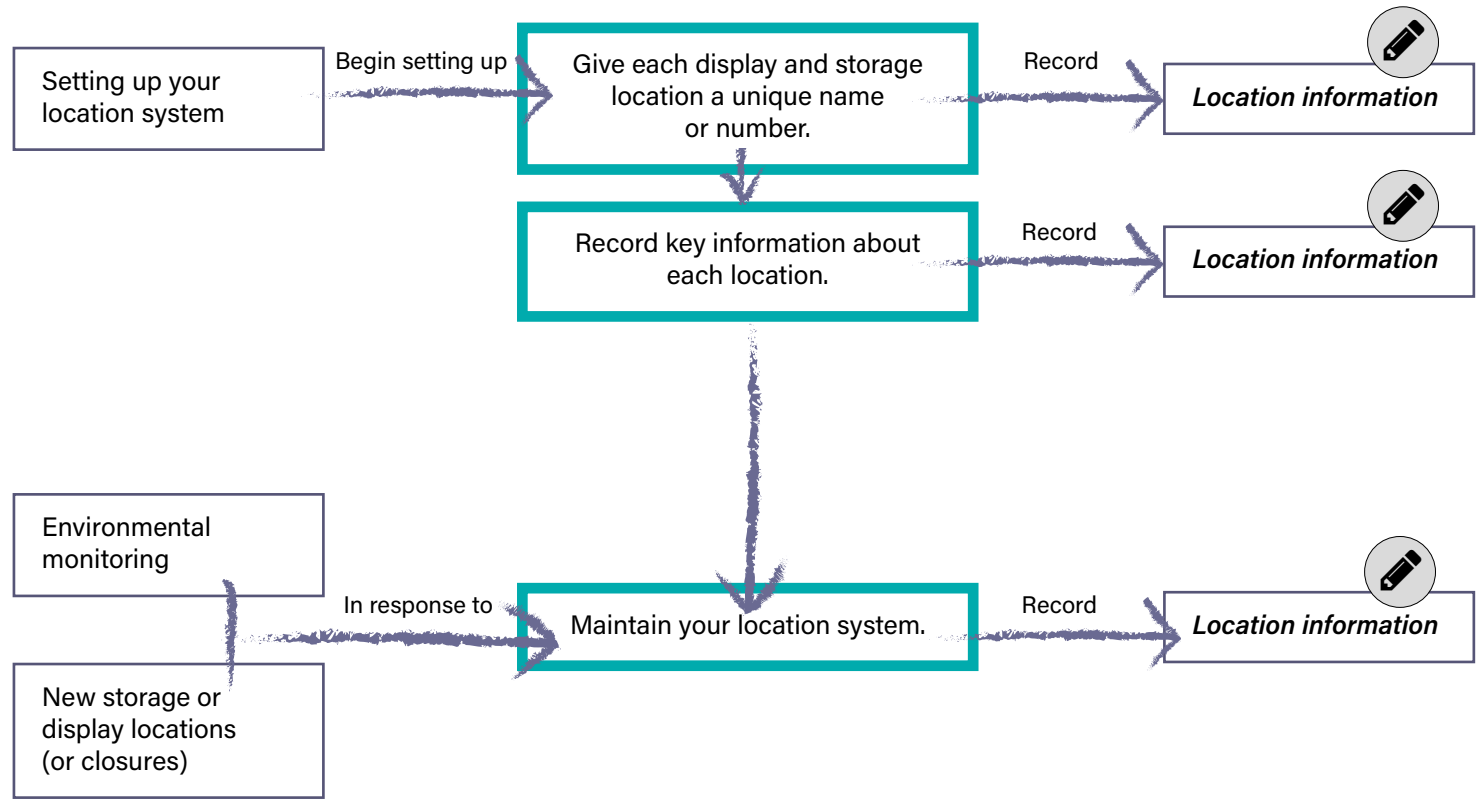
Receive confirmation of transport from the agent, along with the following information:

- Detailed itinerary with route and timings.
- Transport method and route for approval, including any stopovers on long trips.
- Any overseas agents involved.
- Courier travel arrangements.
- Airport loading/unloading and security procedures at either end of the journey.
- The vehicle registration.

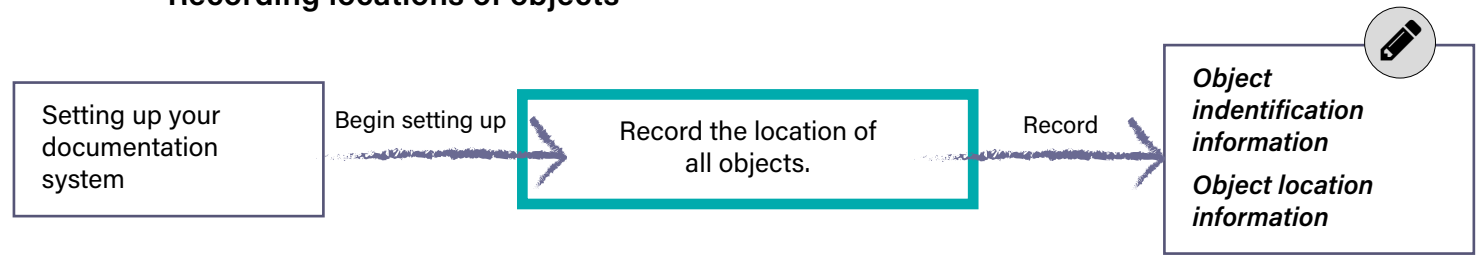
- The names of drivers and a mobile phone number to keep in contact with them.
- Agreed costs and terms and conditions.

Location and movement control

Identifying and describing locations



Recording locations of objects



Moving objects

