Inventory

Definition

Making sure you have the basic information to be accountable for the objects in your care, and tackling the backlog if you do not.

Scope

Use this procedure to check you have the basic information to be accountable for the objects in your care. If your museum has always met the minimum requirements for the other primary procedures, the answer will be yes and you should just keep up the good work. Keeping on top of these other procedures will maintain your inventory information. If the answer is no, this procedure will help you tackle the backlog.

Although some museums may need to add to this list to distinguish between large numbers of very similar objects, the core inventory information you need for each object (or group of objects) is:

- A unique object number (from which it should be clear whether the object is from your accessioned collections, on loan, or has some other status such as a handling item) - ***Object number***.

- An object name - ***Object name***.

- The number of objects (if a group) - ***Number of objects***.

- A brief description (or image) - ***Brief description***.

- The current location - ***Current location***.

- If not your museum, a record of who owns the object - ***Current owner*** (and, if your museum does own it, a record of where it came from).

- A note of who recorded this information and when - ***Recorder*** and ***Recording date***.

You will know when it makes sense to group your objects together. An example might be a cabinet of pinned insect specimens acquired as a single accession. For inventory purposes, you might record the whole cabinet and note how many specimens are in each drawer.

This procedure is about being able to list all your objects if and when you need to. If your collection has been well documented from the start, the information will be spread between accession registers, catalogue records, object entry forms, loan

forms and other records. It might never get brought together into a single list, but it could be without too much difficulty.

If your collection has not been well documented, and you do not have this minimum information (even for groups of objects where appropriate), you should read the guidance below and develop a policy and procedure appropriate to your own museum. Your governing body should aim to achieve the minimum standard for this procedure within an agreed time period, and do all it can to make this happen.

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 how you maintain inventory information for all the objects in your care. 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:

- Where is key inventory information held in your documentation system?
- Does your numbering system meet the minimum requirements of this procedure?
- How will you make sure this information is kept up to date?
- How will you audit inventory information?
- If you do not meet the minimum requirement, how will you achieve it within the next five years?
- How will the governing body enable this to happen?

You should also have a written **procedure** that explains either how you will keep your existing inventory information up to date or how you will tackle your inventory backlog. 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 met the minimum requirements for all other primary procedures.	You are not creating a new backlog of objects without basic information.
From the various records in your system you could, if required, produce a complete list of every object (or group of objects) in your care.	You can account for every object you are responsible for, including your own collections, loans and items temporarily left with you.
Every object (or group of objects) has a unique number securely associated with it, linking your records to the physical items they describe.	You can identify the object you are looking for among a shelf of similar objects.
If a unique number refers to a group of objects, or one object with several parts, you record the number of individual items.	You can quickly make one inventory record for a drawer containing many insect specimens, or for a box containing many pot sherds.
Every object (or group of objects) has a recorded name and brief description (or image).	You know broadly what each object is (eg pot, postcard, drawer of butterflies) even if it has not been catalogued in more detail.
You know the current location of every object (or group of objects) and when it was noted there.	You are able to find objects when you need them. You could produce an accurate list of the objects in a location if needed for an audit or insurance claim.
You know who owns each object (or group of objects) in your care, and how they came to be in your care (eg acquired, on loan).	You can contact the owners of objects due to be returned. You have no 'orphan objects' whose ownership is unclear.
If you have more than one type of collection (eg accessioned objects and a handling collection) you know which collection an object belongs to.	You can make appropriate decisions about how to use objects.
If you do not currently meet the above requirements, you have an appropriate plan to do so within an agreed time period.	Your governing body can meet the minimum standard of accountability for the objects in its care.

Suggested procedure

Having the primary procedures in place

> **Check you meet the Spectrum standard for the other eight primary procedures.**

First, check that you meet the minimum standard set out in the following primary procedures:

- *Object entry*
- *Acquisition and accessioning*
- *Location and movement control*
- *Cataloguing*
- *Object exit*
- *Loans in (borrowing objects)*
- *Loans out (lending objects)*
- *Documentation planning*

> Do you meet the Spectrum standard for the other primary procedures?

If you do, move to the next step below. If not, do not start this procedure until you have the other basics in place. Otherwise, you have no way to keep your core inventory information up to date as objects enter, leave or move around your museum for any reason, and no plan for tackling any backlog.

Checking you have core information

> Do you have core information for every object (or group)?

Although, as noted, some museums may have more detailed in-house requirements, the core information for each object (or group of objects) is:

- A unique object number (from which it should be clear whether the object is from your accessioned collections, on loan, or has some other status such as a handling item) - *Object number*.
- An object name - *Object name*.
- The number of objects (if a group) - *Number of objects*.
- A brief description (or image) - *Brief description*.
- The current location - *Current location*.
- If not your museum, a record of who owns the object - *Current owner* (and, if your museum does own it, a record of where it came from).
- A note of who recorded this information and when - *Recorder* and *Recording date*.

This information is likely to be split between several kinds of documentation (eg object entry forms, accession register, catalogue records or cards). If you use collections management software, the core information for most objects should be recorded there, but you may only have paper forms for newly-arrived objects or short-term loans. You only need to bring this information together into a single list for specific purposes such as an audit.

If your museum has always met the minimum standard for the other primary procedures, you should have this core information for all the objects in your care. If it has not, there will be a backlog of some kind.

If you are not sure how accurate or complete your existing information is, you might audit a random sample of your collection to assess the scale of the problem. See the **Audit** procedure for guidance.

> ## Create a plan for tackling any inventory backlog.

If you know you have a significant number of undocumented objects, or that your location records have been poorly maintained, you should probably start by listing the objects (or groups of objects) in your museum, room by room, shelf by shelf, following the steps recommended below. But first, you need to create a plan for doing this in a systematic way.

Go to, and return from, **Documentation planning**.

Producing an inventory

> ## Go around the locations you are inventorying and list every object (or group) in them.

Start from your list of locations within your museum. If you meet the minimum standard for the **Location and movement control** procedure, you should have listed all your locations already. If not then do so now. The number or name should be detailed enough to locate any object precisely. It may be expressed as a hierarchy (eg building/room/case). Greater detail may be needed for smaller objects (eg fossils in a drawer).

Work systematically through each location you need to inventory, recording the following information for each object or group of objects:

- Object number (if there is one) - **Object number** (use a standard format).
- Number of objects (if a group) - **Number of objects**.
- Object name - **Object name** (use a standard term source).
- Brief description (or take a photograph) - **Brief description**.
- Current location - **Current location**. This should be a **Location reference name/number**.
- Recorder and date - **Recorder** and **Recording date** (use standard formats).

You will probably need to record some material in bulk. When to do this is usually a matter of common sense. An example might be a cabinet of pinned insect specimens acquired as a single accession. For inventory purposes, you might record the whole cabinet and note how many specimens are in each drawer. Other examples might include boxes of pot sherds, or albums of photographs.

Does the object have a number marked on it or on a label?

If an object has an accession number marked on it, or on an attached label, make a record using this number. If there is no number labelled or marked, give the object a temporary identity number. This could be a simple running number sequence (eg prefixed by a 'T'), but should on no account risk being confused with any other numbering system previously used in your museum. Use a temporary method (eg a label) to attach this number to the object.

Create or update records for objects that have accession numbers.

It is likely that objects already marked or labelled with an accession number will already be documented somewhere in your system, if only in the accession register. For these objects, either update your existing records (particularly their location) or create a new catalogue record if one does not exist.

Checking discrepancies

Try to identify objects with temporary numbers.

For the objects you have labelled with temporary numbers, go systematically through existing documentation looking for possible matches. This will probably take much longer than the previous steps of listing the physical objects. Possible sources include:

- Accession records.
- Transfer of title forms.
- Catalogue records.
- Correspondence.
- Entry records.
- Exhibition catalogues.
- Field collection notes.
- Financial records.
- Indexes.
- Labels.
- Loan agreements.
- Reports and minutes.

- Journals and other publications.
- Newspaper cuttings.
- Research notes.
- Staff memories.

Some museums have found it most efficient to transfer information from such documentary sources into searchable digital form, which takes time and effort up front but which can speed up the matching process once done.

Mark or label any objects identified this way with its number.

If you are able to match an object with a temporary number to an existing record for an accessioned object, remove the temporary number and apply the correct accession number, following your museum's labelling and marking guidelines.

Update or add core information (including location).

Create or update records for these newly-identified objects, as you did for those objects already marked with their accession numbers.

Resolving outstanding problems

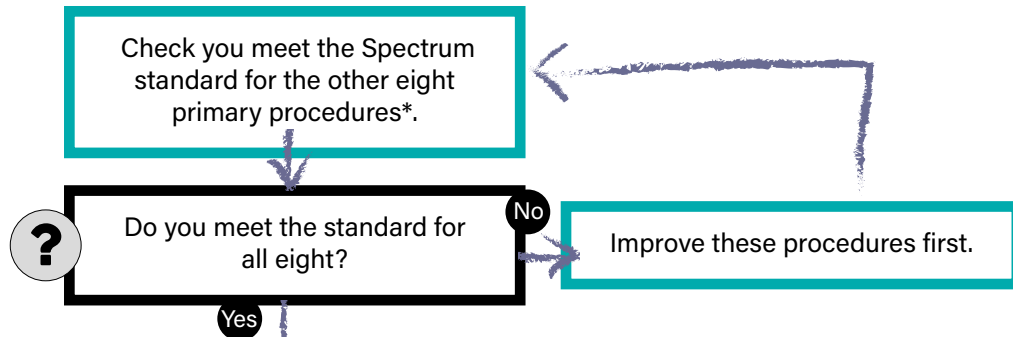## Decide how to deal with unidentified objects.

When all reasonable avenues have been explored, you will be left with unidentified objects that have probably never been accessioned. Following your policy you will need to decide whether to accession them or dispose of them. If you decide to accession, record the acquisition method as something like 'found un-accessioned in the stores.'
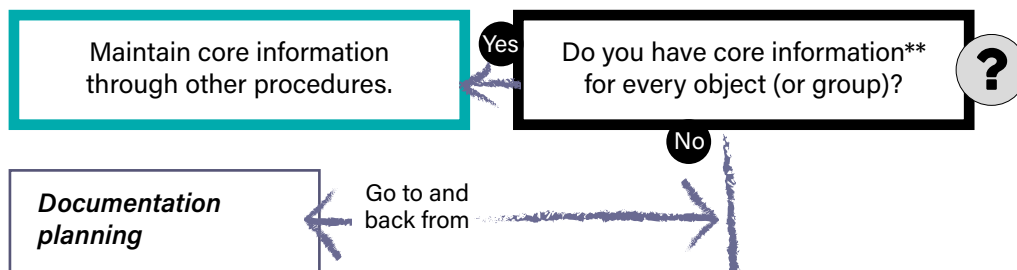
Inventory

Having the primary procedures in place

*The other eight primary procedures are:

- *Object entry*
- *Acquisition and accessioning*
- *Location and movement control*
- *Cataloguing*
- *Object exit*
- *Loans in (borrowing objects)*
- *Loans out (lending objects)*
- *Documentation planning*

Check you meet the Spectrum standard for the other eight primary procedures*.

? Do you meet the standard for all eight?

No → Improve these procedures first.

Yes ↓

Checking you have core information

Maintain core information through other procedures.

Yes ← Do you have core information** for every object (or group)? **?**

No ↓

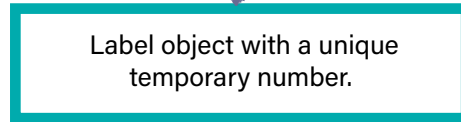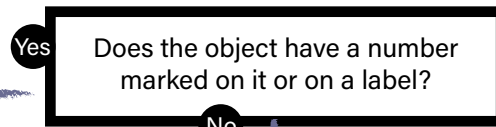*Documentation planning* ← Go to and back from

**Minimum core information for each object (or group of objects) is:

- Object number
- Object name
- Number of objects (if a group)
- Brief description (or image)
- Current location
- Current owner (if not your museum)
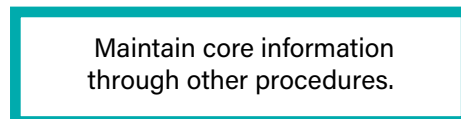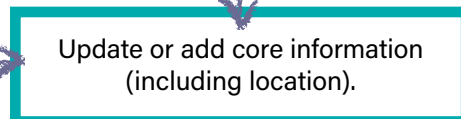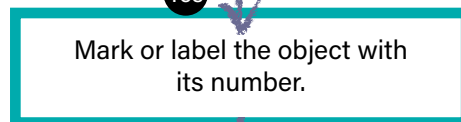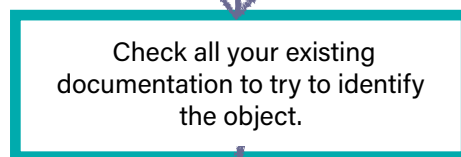- Recorder and date

Producing an inventory

For each location (eg room or shelf) you are inventorying list every object (or group).

Record → *Core information***

Continue on next page

Continued from
Producing an inventory

Does the object have a number
marked on it or on a label?

Yes

No

Label object with a unique
temporary number.

Checking
discrepancies

Check all your existing
documentation to try to identify
the object.

Have you identified the object?

No

Yes

Mark or label the object with
its number.

Update or add core information
(including location).

Maintain core information
through other procedures.

Resolving outstanding problems

Collections review

Go to

Decide how to deal with
unidentified objects.