

Documentation planning

Definition

Making your documentation systems better and enhancing the information they contain as an ongoing process of continual improvement.

Scope

This procedure is more generic than many others. Its focus is on planning and managing any kind of documentation project: defining objectives; writing a plan; monitoring progress; and responding to any problems along the way.

If your organisation does not yet meet the minimum standard for the Inventory procedure, this should be the first priority addressed in your plan.

Not all documentation projects are 'retrospective' in the sense of recording information that should have been noted when objects were first acquired. Cataloguing, in particular, is an ongoing, open-ended process that is less daunting if treated as discrete research projects rather than a single 'backlog.'

Planning improvements to your documentation should be done as part of your organisation's wider forward-planning process. For example, the goal of putting collections images online might prompt a project to improve the copyright information needed to do this, or a planned exhibition might involve research that could enhance object records. As with forward planning, when you come to the end of one documentation plan, you should review your needs again, which may well lead to a new plan.

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 written documentation **policy** (sometimes called a collections information policy). This should ideally form part of an integrated collections management framework - a coherent set of policy statements, plans and procedures that also includes the development, access and care of your collections. Either way, in deciding your policy you will most likely need to consider these questions:

- What are the various elements of your collection information system (eg accession registers, forms, files, computer systems)?
- What ethical obligations and other standards do you aim to meet, and how will you do this (eg your mission, Museums Association *Code of Ethics*, Accreditation, Spectrum)?
- What legal obligations apply to your collection information and how will you meet them (eg data protection, freedom of information)?
- How will you maintain your system to keep it up to date, secure, backed-up, and meeting the needs of your museum and its users?
- What are your priorities for improving your collections information and how will you achieve them?

You should also have a written **procedure** that explains the steps to follow when carrying out planning and managing documentation projects. 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
Review the collections information you already have and agree areas for improvement in the light of your collection management priorities.	You do not spend time and resources working on things that interest you but do not contribute to the wider priorities of your organisation.
You have a written documentation plan setting out specific objectives that can be achieved within a realistic timeframe given the available resources.	You break down 'the backlog' into manageable projects that meet your wider objectives. In the UK this is a requirement of Museum Accreditation.
You review progress towards achieving your plan's objectives regularly.	You can celebrate 'quick wins'. You are able to address any problems that might cause the plan to fail.

Suggested procedure

Reviewing your existing collections information

Review whether your existing collections information meets your needs.

If you do not meet the requirements for **Inventory**, make this the top priority of your documentation plan, based on the specific steps suggested in that procedure.

Other procedures may prompt the need for documentation planning too. For example, a **Collections review** or **Audit** might reveal gaps in your collections

information. Or a plan to make digitised images available online might need a **Rights management** project to sort out the various licensing issues involved.

Check your organisation's policies and plans for collections development, collections access and collections care. Is your existing collections information complete enough, and searchable enough, to support the priorities set out in those documents? If not, what improvements need to be made? How would you prioritise these? Are there any 'quick wins' that would give useful results relatively easily?

Writing your documentation plan

Create your documentation plan.

Based on your review, create a written documentation plan to address your improvement priorities within a defined timescale. This should detail the:

- **Objectives** you wish to achieve, referring to any relevant standards that are important to ensure quality (eg subject-specific cataloguing schemes, terminology sources, image specifications).
- **Actions** your organisation will be taking to meet those objectives (eg take photographs of the objects, use standard terminologies for describing objects, carry out rights research on the collection).
- **Resources** (eg people and time) that will be used.
- **Measurable results** that are based on the stated objectives.
- **Milestones** that can be used to review progress by specified dates.

Above all, the plan's objectives should be achievable within the timescale, given the resources available. If this is not a realistic possibility, you need to prioritise and re-scope the plan. Remember, once you have met the minimum requirements of the **Inventory** procedure, your priorities are up to you. Your documentation plan is a means to the ends you have identified, not an end in itself.

Record the **Document location** of this plan, so that it can easily be found and referred to.

Putting your documentation plan into practice

Get the plan approved.

You should make sure that your governing body and senior managers support the plan and will allocate the resources needed to achieve its objectives.

Put the plan into action.

If your documentation plan is to tackle an inventory backlog, go back to **Inventory**.

If the plan involves other procedures, go to these as needed.

Regularly review your progress, based on the milestones in the plan.

Regularly review your progress, based on the milestones in the plan. Adjust the plan, if necessary, based on the results of the review, and get the revisions approved.

Complete the work and evaluate the plan.

At the end of the period covered by the plan, or revised plan, stop and evaluate how effective it was, noting any lessons learned.

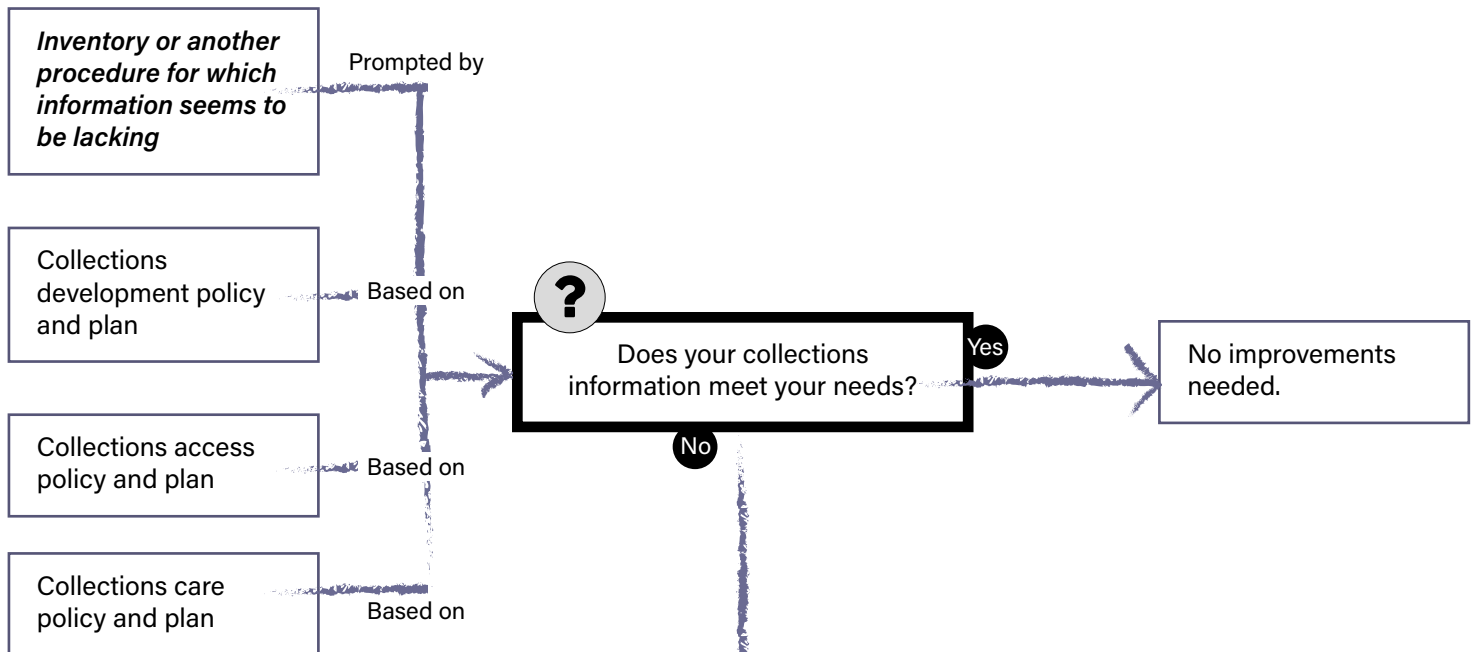
Continual improvement

Repeat the procedure.

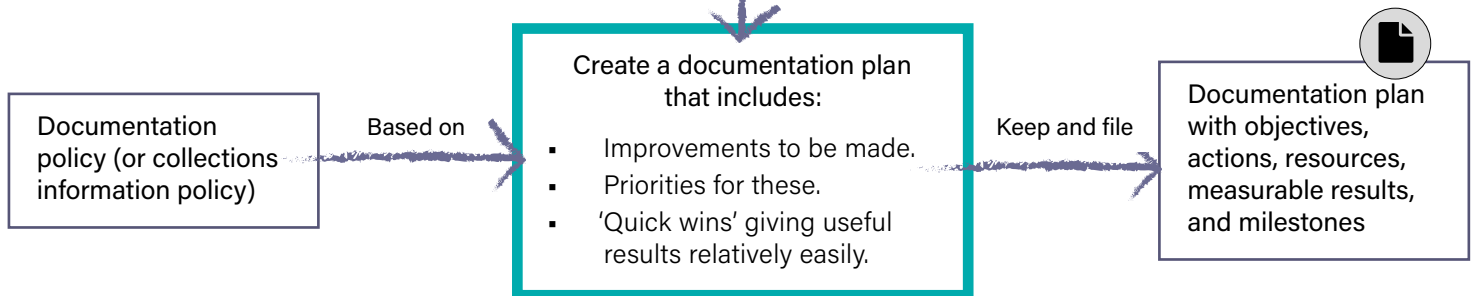
The point of this procedure is continual improvement of your collections information as part of your wider cycle of forward planning. So once you have evaluated one plan, start thinking about the next one.

Documentation planning

Reviewing your existing collections information



Writing your documentation plan



Putting your documentation plan into practice

