Use of collections

Definition

Managing and recording how your collections, including images and other reproductions of them, are used, whether by you or anyone else.

Scope

As well as the managing the use of original objects, the procedure also covers the use of images and other reproductions, when you will usually need the *Rights management* procedure too. You might also use this procedure together with *Loans out (lending objects)* to capture information about how your objects were used while out on loan.

The range of potential uses is very wide. Among others they include: exhibitions; publishing images online or in print; learning events; enquiries; research projects; operating working machinery; playing musical instruments; filming; and inspiring new work by artists.

The procedure is not a guide to planning exhibitions or other specific uses. Instead it helps you: assess and authorise proposed uses of your collections; record each individual use; and capture information created, such as exhibition text, research findings and user-generated content. It also cross-refers to the many other procedures you are likely to need before, during and after any kind of use.

The Spectrum standard

You should have a **policy** covering the use of collections (sometimes called a collections access policy). This should be compatible with your collection care policy, your collection information policy and your collection development policy - ideally as part of an integrated collections management framework. Either way, in deciding your policy you will most likely need to consider these questions:

- What is your museum's mission?
- How will you use your collections, and make them available for others to use, in line with your mission?
- What legal, ethical or other issues might need to be taken into account when considering proposed uses of your collections?
- Who can authorise the use of your collections, including reproductions?

- How will you make information about your collections available?

- How will you make your collections physically accessible to researchers?

- If relevant, how will you deal with research requests that involve taking samples of material for destructive testing?

- What is your approach to licensing material, such as images, for which you hold sole rights?

- Will you use material that is in copyright (or likely to be) if you cannot contact relevant rights holders for whatever reason?

You should also have a written **procedure** that explains the steps to follow when managing the use of your collections. 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 for making, reviewing and authorising requests to use objects and reproductions.	Your objects are not put at risk by being used inappropriately, and there is an audit trail in case of any problems.
You note each use of an object or reproduction, and can access this information via the relevant object number or reproduction number.	You can let key stakeholders know how much your collections are being used. You do not over-expose a light-sensitive object by not recording how long it has been exhibited.
Your system prevents objects being booked for more than one use at a time.	You can coordinate the use of your objects, particularly in larger museums.
You keep a record of researchers and other people who have used specific objects.	You can audit items used by a particular user if any security concerns arise in future.
You add any knowledge gained and content created while using objects or reproductions to your catalogue.	You can re-use exhibition texts to enhance your online collections information.

Suggested procedure

Evaluating the proposed use of objects or reproductions

Will the objects be loaned out?

If you receive a request that involves lending your objects to someone else go to *Loans out (lending objects)*.

Create a record of the proposed use.

For all other uses of objects or reproductions (including proposals from within your museum as well as external requests), record the following information. You may have a standard form for recording use requests. Make a note of the *Document location* so that it can easily be found and referred to.

Use of collections information

- A unique reference number for the use - *Use reference number* (use a standard format).
- If applicable, any *Use title* (eg exhibition or book title).
- The *Use type* (eg exhibition, research) (use a standard term source).
- Date of use:
    - For a single day - *Use begin date* (use a standard format).
    - For a period add - *Use end date* (use a standard format).
- Name and contact details of whoever is making the request:
    - *User* (use a standard form of name).
    - *User's contact* (use a standard form of name).
    - *Address*.
- Person within your museum responsible for dealing with the use - *Use organiser* (use a standard form of name).
- Where the use is taking place, if not at your museum - *Use venue* (use a standard form of name).
- Information about the use (eg details of online use or print run of a book) or user (eg their status) - *Use request note*.

Object identification information

Details of each object required for the use, including:

- *Object number*.
- *Brief description*.

And/or

Reproduction information

Details of each reproduction required for the use, including:

- *Reproduction number*.
- *Reproduction description*.

Use information

- The status of the use - *Use status* (use a standard term source).
    - The date of that status - *Use status date* (use a standard format).

Initially, the status will be 'requested'. Update as the status changes during the procedure.

Evaluate the proposal.

Following your policy, seek authorisation for the proposed use. As well as general policy considerations, there may be specific risks associated with individual objects (eg hazards) or reproductions (eg unknown copyright status). If these are not already recorded in the relevant catalogue records, authorisation at this stage may need to be provisional, pending further investigation and possibly expert advice.

Is the proposed use authorised?

When a decision has been reached, inform the person requesting or proposing the use. If the use is authorised, you may need a written agreement for the use (eg signed acceptance of research room terms and conditions, or a licence to use reproductions). If the use is not authorised, set out the reasons. Either way make a note of the *Document location* so that it can easily be found and referred to.

Using reproductions

Make sure any relevant rights are cleared or licensed.

If reproductions are to be used, you will need to ensure that any associated rights are dealt with: clearing any rights held by other people and/or licensing any rights held by you. Note that rights may exist both in the original objects and in reproductions of them. If so, these are likely to be held by different people and will need to be dealt with separately. Go to *Rights management*.

Photograph the objects if needed.

Assuming all rights issues have been dealt with, if you need new photographs of objects for the proposed use go to *Reproduction*.

Get information about objects.

If you need information about the objects depicted in reproductions, go to the relevant catalogue records. If you are writing new captions you can add these to existing catalogue records later in this procedure.

Using objects

If needed create a file for the project or activity.

Examples might include a project file for an exhibition, a researcher file or an operating log for a working exhibit. Make a note of the *Document location* so you and others can find it in future.

Keep a record of the stage of the use of an object, group of objects, or reproduction has reached during the use:

Use information

- The status of the use - *Use status* (use a standard term source).
    - The date of that status - *Use status date* (use a standard format).

Update as the status changes during the use (eg requested, authorised, agreed, conservation, photography).

Reserve the objects for the period of use.

Reserve the objects so they are available when you need them, particularly in a larger museum where someone else might also need them at the same time.

Check the condition of the objects.

To check that the objects can safely be used go to **Condition checking and technical assessment**.

If, as a result, conservation is needed go to **Collections care and conservation**.

Move the objects before and after use.

If needed, arrange for the objects to be moved before and, if applicable, after use, and update the relevant location records go to **Location and movement control**.

Documenting the use of objects or reproductions

Add relevant information arising from the use. This might include:

Use information

Data associated with the use (eg environmental conditions, visitor numbers, online activity), recorded as needed by:

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

Any interpretive text created for the use:

- *Text reference number* (use a standard format).
- *Text*.
- *Text audience* (use a standard term source).
- *Text author* (use a standard form of name).
- *Text date* (use a standard format).
- *Text language* (use a standard term source).

- *Text note*.
- *Text reason* (use a standard term source).

Record new restrictions on use (eg may not be loaned, only accessible by staff, or not accessible by external researchers) which are a result of this use:

- The nature of the restriction - *Use restriction* (use a standard term source).
  - The date when the restriction applied from - *Use restriction date* (use a standard format).
- Any other information about the restriction - *Use restriction note*.

Use of collections information

- A unique reference number for the use - *Use reference number* (use a standard format).
- If applicable, any *Use title* (eg exhibition or book title).
- The *Use type* (eg exhibition, research) (use a standard term source).
- When the date when the use took place:
  - For a single day - *Use begin date* (use a standard format).
  - For a period add - *Use end date* (use a standard format).
- Who the *User* was (use a standard form of name).
- Who within your museum was responsible for dealing with the use - *Use organiser* (use a standard form of name).
- Details of the authorisation of the use:
  - Who authorised the use - *Use authoriser* (use a standard form of name).
  - When the authorisation took place - *Use authorisation date* (use a standard format).
- Any conditions attached to the use - *Use provisos*.
- Where the use is taking place - *Use venue* (use a standard form of name).
- *Use result* (use a standard term source).
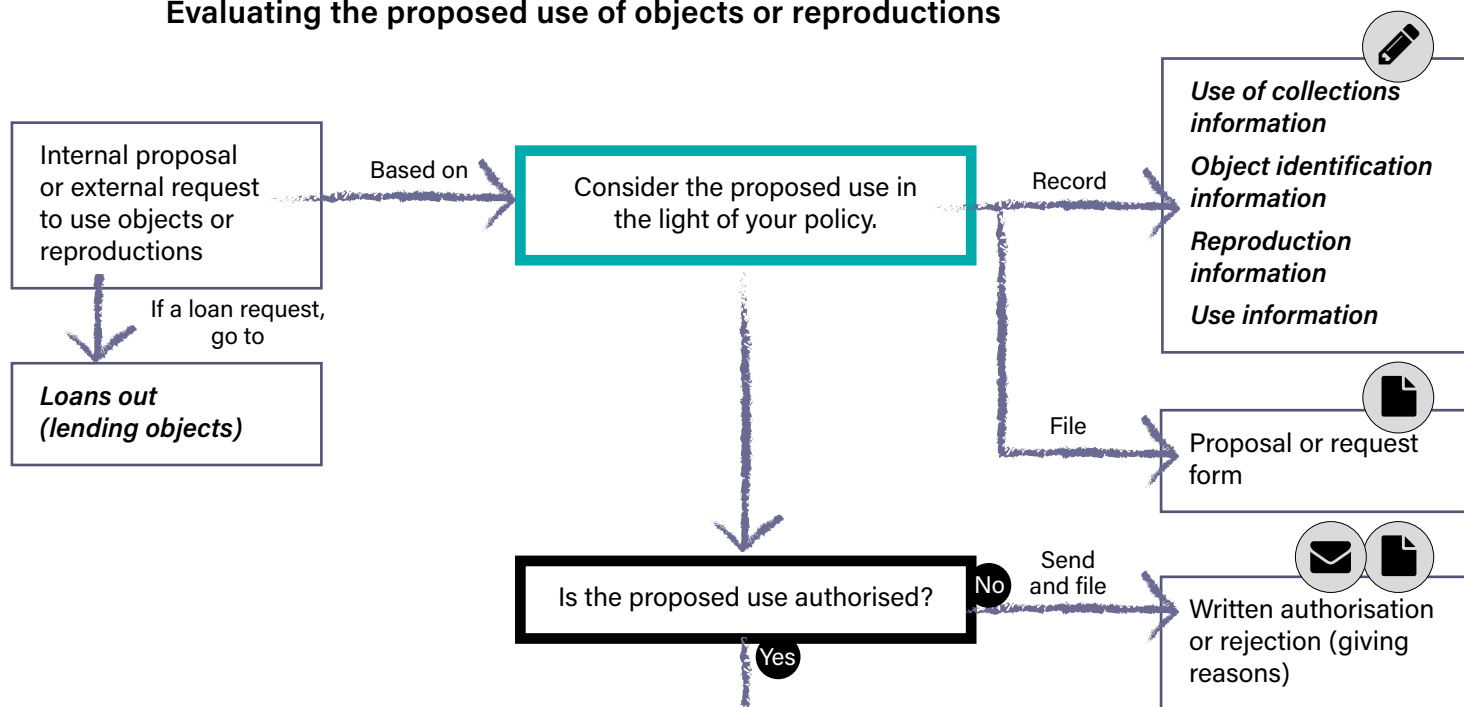- Any other information about the use - *Use note*.

If the use involves gathering information or other responses from your museum's users, you might also add the following to the relevant catalogue records:

User's contribution information

- *User's reference*.
- *User's role* (use a standard term source).
- *User's personal experience*.
- *User's personal response*.
- *User's contribution note*.

Use of collections

Evaluating the proposed use of objects or reproductions

Internal proposal or external request to use objects or reproductions

Based on →

Consider the proposed use in the light of your policy.

Record →

Use of collections information

Object identification information

Reproduction information

Use information

If a loan request, go to

Loans out (lending objects)

File →

Proposal or request form

Is the proposed use authorised?

No — Send and file →

Written authorisation or rejection (giving reasons)

Yes ↓

Using reproductions

Will reproductions be used? — No

Yes ↓

Go to and return from

Rights management

Clear others' rights and/or license your material.

Go to and return from

Reproduction

Photograph the objects if needed.

Get information about objects from catalogue records.

Continue on next page

Using objects

If needed create a file for the project or activity.

File → Project or activity files, eg: exhibition file, researcher file, operating log

Record use stage → *Use information*

Reserve the objects for the period of use.

Condition checking and technical assessment ← Go to and return from → Check the condition of the objects.

Location and movement control ← Go to and return from → If needed, arrange for objects to be moved before and after use and update location records.

Documenting the use of objects or reproductions

Record:
- Information on the use.
- New content generated by the use (eg captions).
- Relevant data arising from it (eg visitor numbers, lux hours, online activity).
- Users' (eg visitors) reactions.

Record → *Use of collections information*
Use information
User's contribution information

Update the relevant project or activity files with details of any evaluation of the use.

Update → Project or activity files, eg: exhibition file, researcher file, operating log