

Collections review

Definition

Managing and documenting any formal assessment of your collections that follows a stated methodology.

Scope

The scope of such reviews might range from a few items to the whole collection. They might be carried out in-house, or involve working across museum networks, sometimes with the input of your local stakeholders or subject specialists.

Reviews are often the first stage of rationalising collections, which can lead to the **Deaccessioning and disposal** of objects. However, there are many other reasons to review collections. These include: understanding the significance of your holdings; identifying opportunities to develop under-used collections; getting new insights into what your users find interesting about your objects; and planning future research, use and collections care.

There are published methodologies for several kinds of collections review, and you might want to base your own on one of these. Typically, you assess objects against a number of criteria (eg significance) and score each object against an agreed scale (eg locally significant, nationally significant, internationally significant; or 1, 2, 3). Whatever framework you use, this procedure helps you capture the results in a systematic way that links to the relevant object records.

As you go through your collection systematically, you might sometimes want to combine a review with other procedures such as **Audit, Condition checking and technical assessment** or **Reproduction**.

The Spectrum standard

You should have a **policy** on why and how you carry out collection reviews. This might form part of a wider collection development policy that takes an integrated approach to acquisition and disposal, particularly if the aim of your reviews is to get a better understanding of the strengths and weaknesses of your collection. Either way, in deciding your policy you will most likely need to consider these questions:

Why might you carry out collection reviews?

- What legal and ethical considerations will you take into account (eg Museum Association *Code of Ethics*)?
- Which parts of your collection are priorities for review?
- Who is authorised to carry out collection reviews?
- Do you have all the skills you need, or will you need expertise from outside your museum?
- Are there opportunities for you to take part in wider projects, such as regional or subject-specific reviews?
- How will the results of collection reviews be reported and considered?
- How will you make the results of collections reviews accessible to others?

You should also have a written **procedure** that explains the steps to follow when a collections review takes place. 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 create and file a written plan for each review that includes the methodology to be followed, the criteria to be assessed and the scoring system to be used.	There is no point recording that the significance of an object is '3' if nobody else knows what that means.
You record the date of each object assessment and the person responsible for a scoring decision.	You know when an object has been reviewed by someone with specialist curatorial expertise.
You record the relevant numbers of each object (or group of objects) assessed.	It is clear which scoring decisions relate to which objects.
You add review assessments to your catalogue.	When looking at an object record you can see that it has been reviewed and you can find the relevant information.
You analyse the results of collection reviews and recommend appropriate follow-up action.	Reviews can inform your strategic planning.

Suggested procedure

Collections review planning

Set your objectives.

Setting clear reasons for the review, aligned to your museum's wider strategic goals, is an important first step. See **Note 1** for some potential objectives that might be relevant to your museum.

Decide which collections to review.

There are examples of entire museum collections being reviewed and rationalised, but it is more usual to focus on particular areas of a collection, eg:

- By subject or location.
- A collection type which is under-used.
- The theme of a forthcoming exhibition.

There may be some areas of the collections which you wish to review at a group level and others which require an object-by-object approach. Many collections review projects combine both levels, depending on the questions being asked and the resources available.

Identify who will be involved.

Collections reviews are often best done by a team with a range of skills and expertise and from across collections, subject specialisms and audience perspectives.

Choose or develop your methodology.

Following a defined methodology for collections review gives you a logical decision-making process based on clearly-stated criteria.

Several published methodologies for collections review are available (eg from the Collections Trust website). These might give you a starting point and a guide for your own review plan if your focus is any of these issues:

- Collections significance.
- Collections management and care.
- Collections use and engagement.

Each methodology follows a similar process of assessing collections against a range of criteria, and recording the results in the form of a grid.

Create your collections review plan.

The plan needs to refer to your objectives and include:

- Description of which collections are under review.
- The questions you are aiming to answer with the review.
- The methodology you will be using.
- The resources required to undertake the review.
- The timescale for the review.
- How you will review the results and outcomes

Recording a review

Record information about the review.

Record the following information about the collections review process:

Object identification information

- The numbers of the objects under review (including temporary numbers) - **Object number**.

Collections review information

- A reference number for the review - **Collections review reference number** and optionally a title for it - **Collections review title**.
- The reason for the review - **Collections review reason** (use a standard term source).
- The type of review being carried out - **Collections review type** (use a standard term source).
- The method being used in the review - **Collections review method** (use a standard term source).
- The person responsible for managing the review - **Collections review manager** (use a standard form of name).
- The person authorising the review - **Collections review authoriser** (Use a standard form of name).
 - The date of the authorisation - **Collections review authorisation date** (use a standard format).
- The date the review began - **Collections review begin date** (use a standard format).
- The date the review ended - **Collections review end date** (use a standard format).
- The status of the review - **Collections review status** (use a standard term source).
 - **Collections review status date** (use a standard format).
- Any other relevant information about the collections review - **Collections review note** (eg budget for review project, background information).

Depending on the length of the process, you may need to update the status of the project at key milestones during the review:

- New status - **Collections review status** (use a standard term source).
 - Date of the new status - **Collections review status date** (use a standard format).

Record result of review for each object.

Using the criteria of your chosen methodology, for each object (or group) record the results of the review:

Object identification information

- The objects that the result refers to - **Object number**.

Object collections review information

- The reference number for the review - **Collections review reference number**.
- The criterion of the review being recorded - **Collections review criterion** (use a standard term source).
- The assessment of the objects reached against this criterion - **Collections review result** (use a standard term source).
 - The date of the result - **Collections review result date** (use a standard format).

Record new restrictions on use resulting from this review (eg may not be loaned, only accessible by staff, or not accessible by external researchers):

Use information

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

Analysing a review and actions

Analyse the results of the review.

Referring back to the objects of the review, and the questions you wanted to answer, look through the data and make recommendations for action, whether at the group level or for individual objects.

For each object reviewed record:

Object identification information

- The objects that the result refers to - **Object number**.

Object collections review information

- The recommended action - **Collections review action** (use a standard term source).

Carry out appropriate procedure based on recommended action.

The results of the review may recommend actions for objects, eg:

- Conversion of a loan to a gift, then go to **Acquisition and accessioning**.
- Revaluation of the object, then go to **Valuation**.
- A new use for the object, or new knowledge about the object (eg display or research), then go to **Use of collections**.
- Adding new knowledge about an object, then go to **Cataloguing**.
- Return of a loan, then go to **Loans in (borrowing objects)**.
- Disposal according to your policy then go to **Deaccessioning and disposal**.

Guidance notes

Note 1: Potential objectives for a collections review

Reasons for a review include to:

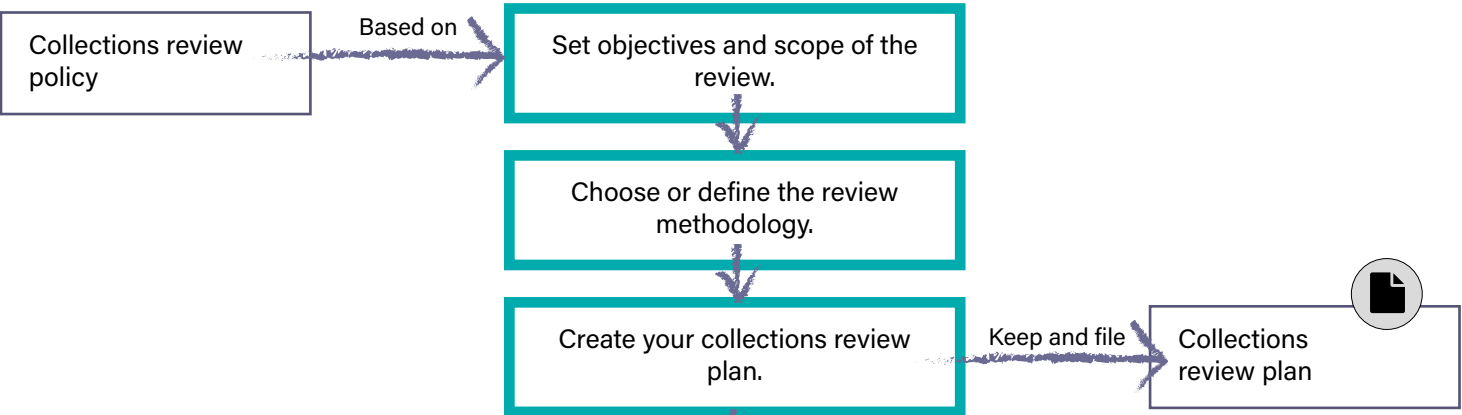
- Improve your knowledge about an area of the collection.
- Choose objects for a new exhibition or display.
- Understand the significance of the collections organisationally, regionally, nationally or internationally.
- Develop the skills and expertise of staff, volunteers or external experts through a better understanding of the collection.
- Understand the storage and care needs of your collections.
- Resolve an historic and unsystematic approach to collecting, which has resulted in the need to decide if some objects should remain in your collection.
- Maximise the collections knowledge and expertise of a member of staff, volunteer or expert.

The benefits that may result from a review include:

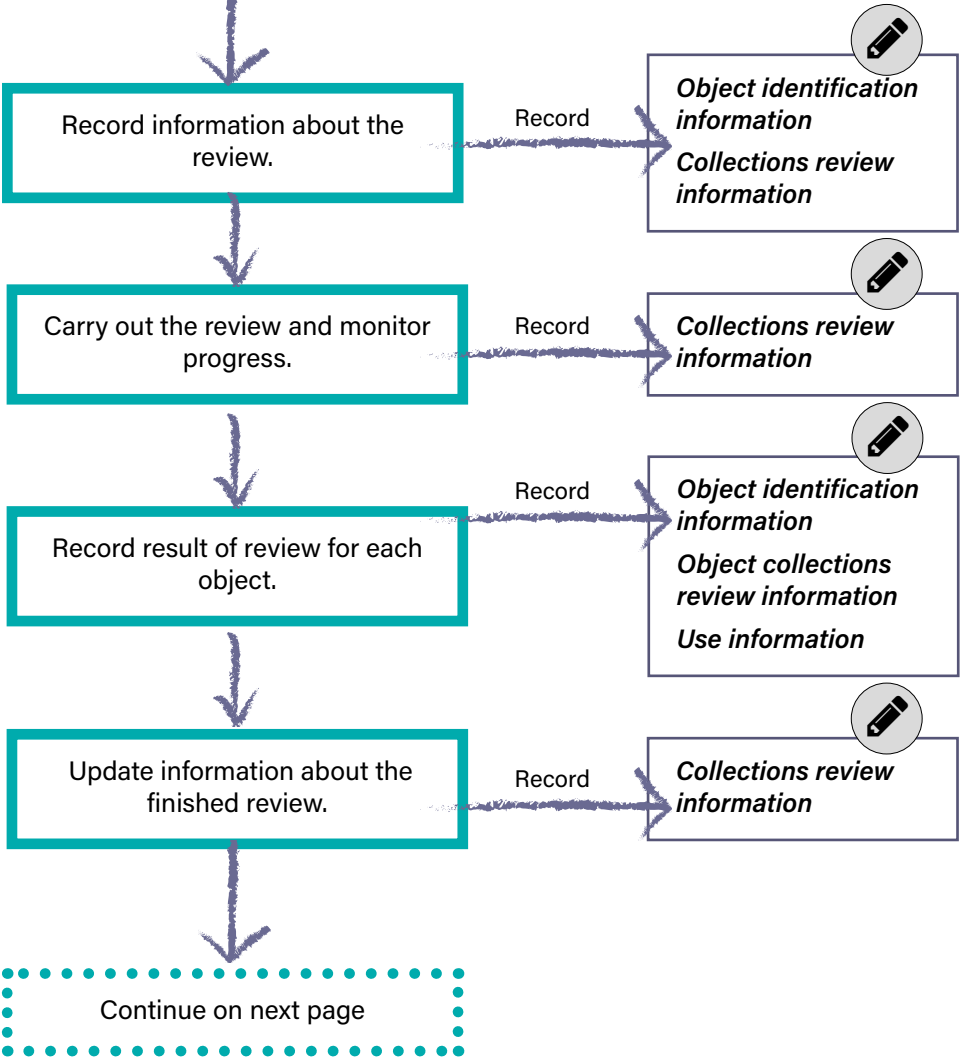
- Identification of gaps in your collection.
- Greater promotion of your collections internally and externally, leading to greater research in and use of the collections.
- The significance of an object is measured by its learning potential and user engagement as well as its curatorial value.
- Prioritisation of care for some areas of the collection.
- Identification of objects which could form part of a handling collection.
- Disposal of objects from your collections (eg by reuse in handling collections, transfer to other organisations, destruction, or sale).

Collections review

Collections review planning

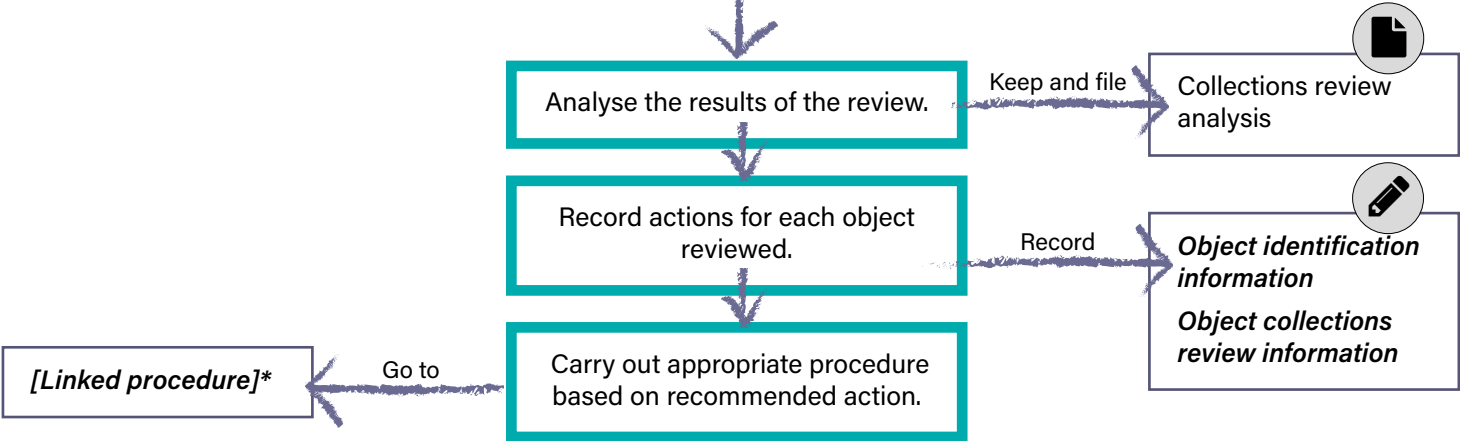


Recording a review



Analysing a review and actions

Continued from
Recording a review



* Whichever other Spectrum procedure needed for further action