Croydon Museum and Archives: Collection Management Plan

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1. Collections Development Policy

Name of museum: Museum of Croydon

Name of governing body: Croydon Council - Cabinet

Approved by Councillor Tim Pollard, Cabinet member for Children Families & Learning, under his delegated powers on 3rd June 2013.

Date at which this policy is due for review: February 2018

1.1 Statement of Purpose

The Museum of Croydon collects, conserves and interprets Croydon's cultural heritage to enable individuals and organisations to take part in creative and enjoyable learning experiences.

1.2 Overview of Current Collections

Croydon Museum Service was established by the London Borough of Croydon in 1989. At that time the service inherited a number of existing collections: Croydon Art Collection; the Riesco Collection of Chinese ceramics; and approximately 650 objects of local and social history interest including archaeological finds.

Between 1989 and 1995, the museum service actively collected oral histories and objects related to the social and cultural history of Croydon which formed the basis of the Lifetimes gallery (which opened in 1995). The Handling Collection was also established in 1994.

From 1995 to date, the museum service has continued to collect oral histories and objects for the purpose of developing the museum’s displays or adding to the handling collection.

In September 2006, the newly re-furbished Museum of Croydon opened. These galleries display a selection of objects and stories, largely drawn from the Oral history and Social and Cultural history collections. The Riesco Collection of Chinese ceramics is on permanent display in the Riesco Gallery at Croydon Clocktower. The Handling collection is on display in the Clocktower Activities Room and is in regular use for visiting school and community groups.

The Croydon Art Collection, Pre 1800 social history and archaeology collection and Oral history collection are located in the museum stores and made available to the public for research via appointment and web technologies, where appropriate.

The museum’s current collections are categorised as follows:

Oral history collection: 431 recordings of Croydon people’s memories and feelings.

Social and cultural history collection: Approximately 220 objects relating to the social and cultural history of Croydon people from 1800 to today.

Croydon Art Collection: Approximately 2,500 2D artworks dating from the 18th to the 20th century. A large proportion of these works are local landscapes.
Riesco Collection of Chinese ceramics: 233 pieces dating from the Neolithic period to the 19th century – the bequest of Raymond Riesco, a local collector.

Pre-1800 social history and archaeology collection: Approximately 500 items of local and social history interest including archaeological finds.

Handling collection: Approximately 350 things to be used for handling sessions and education projects.

1.3 Future Themes and Collecting

1.3.1 General Parameters

Period of time:

- We will collect material dating from 1800 to today; the date range covered by the Museum of Croydon displays.
- Our collecting methodology is oral history led, therefore we concentrate primarily on collecting within living memory.
- The strength and main focus of our collecting methodology and practice is contemporary collecting. ‘Contemporary’ is defined in this policy as material from the last 25 years.

Geographical area:

- We collect from Croydon people.
- A Croydon person means someone who has lived in, worked in or visited Croydon.
- Croydon means the area now constituting the London Borough of Croydon.

Subject / Theme:

- Our collecting will be kept in balance by 25 subject themes which cover human experience: World Events; National Events; Home Life and Housing; Demography; Work; Personal Hygiene and Public Health; Natural and Built Environment; Fashion and Taste; Media and Communications; Religion and Morality; Crime and Law; Sex and Love; Education; Health; Transport and Travel; Arts and Crafts; Welfare; Politics and Economy; Leisure; Food and Farming; Retail, Trade and Shopping; Science and Technology; Dying and Bereavement; Parenthood; Other
- We will strive to ensure that the 25 themes are represented equally across our displays and collecting in the long-term.

Other considerations:
• We will not collect simply to add to our existing collection. We do not plan to add to our collections of art, Chinese ceramics or pre-1800 social history and archaeology.

• Where possible, the museum will borrow social or cultural history objects from 1800 to today rather than acquiring them. This restriction does not apply to the oral history or handling collections.

The museum will only acquire or borrow objects if we know that we will display them in the Museum of Croydon or use them for handling sessions or other projects. This restriction does not apply to the oral history collection.

1.3.2 Methodology for Collecting

• Our collecting will be led by oral history recording:
  We will record Croydon people’s memories and feelings as a way of understanding the recent past through personal experience. These testimonies will be cared for as objects in themselves, but also developed into stories for display in the Museum of Croydon where appropriate.

• Our collecting will tell Croydon people’s stories:
  We will only acquire or borrow objects for the Museum of Croydon if they have a link with a Croydon person between 1800 and today. We will only collect these things if the link is strong and the object or story behind it is really special. There will normally be a strong link between the object and an oral history or first-person primary source.

• Our collecting will be integrated with our community engagement work:
  The community should be enabled to effect changes in the museum’s collection and interpretation. We will consider the potential collecting outputs at the start of each new community engagement project and we will generate at least one contemporary collecting focussed project per year. We will build relationships and partnerships as an integral part of our collecting.

• Our collecting will be consultative:
  We will consult with key stakeholders and customers to review our collecting over the past planning cycle and to inform our collecting for the future.

• Our collecting will represent and celebrate all kinds of Croydon people:
  We serve a diverse community and we intend to develop our collections and displays to reflect that. Where possible we will use a statistical, objective basis to achieve equality of representation in terms of gender, ethnicity, social status, sexuality, age and disability. Where this information is not available or reliable we will still collect hidden histories and focus collecting projects on groups or life events that have been historically under-represented.

• Our collecting will be active and targeted:
  We will act on imbalances and gaps that we identify against our structural frameworks for collecting and on priorities identified through our consultation work. We will only collect passively where the material offered fits with our collecting priorities or is exceptional.
1.4 Themes and Priorities for Rationalisation and Disposal

Due to the nature of our collecting policy the rationalisation of our collection was not seen as a key priority for the service in the 2007-12 planning cycle. However, the changes to the structure and scope of the Museum & archives service since 2010 have necessitated a review of all historic collections held by Croydon Council to ensure that they are efficiently managed, developed and made accessible with a view to maximising public benefit.

We recognise that curatorially motivated disposal plays an important role in the long-term development of our collections. The themes, priorities and methodology which guide our collecting (as detailed in Section 3) will also guide any recommendations to the museum’s governing body regarding disposal from the collections. Decisions to dispose will be guided by the principles outlined in clauses 1.13 (e) and 1.13 (f) and conducted according to the principles and procedures outlined in Section 1.13 generally.

1.5 Limitations on Collecting

The museum recognises its responsibility, in acquiring additions to its collections, to ensure that care of collections, documentation arrangements and use of collections will meet the requirements of the Accreditation Standard. It will take into account limitations on collecting imposed by such factors as staffing, storage and care of collection arrangements.

1.6 Collecting Policies of Other Museums

The museum will take account of the collecting policies of other museums and other organisations collecting in the same or related areas or subject fields. It will consult with these organisations where conflicts of interest may arise or to define areas of specialism, in order to avoid unnecessary duplication and waste of resources.

Specific reference is made to the following museum(s):

Croydon Local Studies Library & Archives
Croydon Local Studies Library & Archives have large collections of books, periodicals, archives and manuscripts, photographs, maps, film and videos relating to the area now constituting the London Borough of Croydon.

Croydon Natural History and Scientific Society
The Society has been in existence since 1870 and has collected as part of its fieldwork studies. The museum collections include archaeological, geological and natural history items as well as more recent social / local history objects, photographs and some ethnographic material. The Society is hoping to find suitable accommodation to create a museum / discovery centre where its collections could be used by the public.
Croydon Museum & Archives Collections Management Plan, July 2013

**East Surrey Museum**
The Museum was set up in 1980 and serves Caterham and the surrounding area. It collects geological, archaeological, agricultural, social and natural history objects relating to East Surrey.

**Crystal Palace Museum**
The Museum was set up in 1979 and collects objects and information relating to the Crystal Palace and its history.

**Museum of London**
The Museum collects items relating to the history of Croydon as part of its London-wide collecting remit, particularly material excavated in Croydon by Museum of London Archaeology (MOLA).

**Croydon Airport Society**
The Society owns and collects objects and information relating to the history of Croydon Airport. The Society has a Visitor Centre within the former airport control tower where some of its material is displayed.

### 1.7 Policy Review Procedure

The collections development policy will be published and reviewed from time to time, at least once every five years. The date when the policy is next due for review is noted above.

Arts Council England will be notified of any changes to the collections development policy, and the implications of any such changes for the future of existing collections.

### 1.8 Acquisitions Not Covered by the Policy

Acquisitions outside the current stated policy will only be made in very exceptional circumstances, and then only after proper consideration by the governing body of the museum itself, having regard to the interests of other museums.

### 1.9 Acquisition Procedures

a. The museum will exercise due diligence and make every effort not to acquire, whether by purchase, gift, bequest or exchange, any object or specimen unless the governing body or responsible officer is satisfied that the museum can acquire a valid title to the item in question.

b. In particular, the museum will not acquire any object or specimen unless it is satisfied that the object or specimen has not been acquired in, or exported from, its country of origin (or any intermediate country in which it may have been legally owned) in violation of that country’s laws. (For the purposes of this paragraph ‘country of origin’ includes the United Kingdom).

c. In accordance with the provisions of the UNESCO 1970 Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, which the UK ratified with effect from November 1 2002, and the Dealing in
Cultural Objects (Offences) Act 2003, the museum will reject any items that have been illicitly traded. The governing body will be guided by the national guidance on the responsible acquisition of cultural property issued by the Department for Culture, Media and Sport in 2005.

d. The museum will not acquire any biological or geological material.

e. The museum will not acquire any archaeological material

f. Any exceptions to the above clauses 1.9a, 1.9b, 1.9c, or 1.9e will only be because the museum is:

- acting as an externally approved repository of last resort for material of local (UK) origin
- acquiring an item of minor importance that lacks secure ownership history but in the best judgement of experts in the field concerned has not been illicitly traded
- acting with the permission of authorities with the requisite jurisdiction in the country of origin
- in possession of reliable documentary evidence that the item was exported from its country of origin before 1970

In these cases the museum will be open and transparent in the way it makes decisions and will act only with the express consent of an appropriate outside authority.

g. As the museum holds or intends to acquire human remains from any period, it will follow the procedures in the ‘Guidance for the care of human remains in museums’ issued by DCMS in 2005.

1.10 Spoliation

The museum will use the statement of principles ‘Spoliation of Works of Art during the Nazi, Holocaust and World War II period’, issued for non-national museums in 1999 by the Museums and Galleries Commission.

1.11 The Repatriation and Reconstitution of Objects and Human Remains

The museum’s governing body, acting on the advice of the museum’s professional staff, if any, may take a decision to return human remains (unless covered by the ‘Guidance for the care of human remains in museums’ issued by DCMS in 2005) , objects or specimens to a country or people of origin. The museum will take such decisions on a case by case basis; within its legal position and taking into account all ethical implications and available guidance. This will mean that the procedures described in 1.13a-1.13d, 1.13g and 1.13o/s below will be followed but the remaining procedures are not appropriate.

The disposal of human remains from museums in England, Northern Ireland and Wales will follow the procedures in the ‘Guidance for the care of human remains in museums’.
1.12 Management of Archives

At present all such material is managed by Croydon Local Studies Library & Archives and is therefore outside the scope of the Museum of Croydon: Collections Development Policy. In light of Croydon museum & archives integrated structure within the Council and The National Archives’ emerging Archive Service Accreditation Standard, this arrangement will be reviewed by October 2015. Should the existing management arrangement change in future, the following will apply:

As the museum holds/intends to acquire archives, including photographs and printed ephemera, its governing body will be guided by the Code of Practice on Archives for Museums and Galleries in the United Kingdom (third edition, 2002).

1.13 Disposal Procedures

Disposal preliminaries:

a. The governing body will ensure that the disposal process is carried out openly and with transparency.

b. By definition, the museum has a long-term purpose and holds collections in trust for society in relation to its stated objectives. The governing body therefore accepts the principle that sound curatorial reasons for disposal must be established before consideration is given to the disposal of any items in the museum’s collection.

c. The museum will confirm that it is legally free to dispose of an item and agreements on disposal made with donors will be taken into account.

d. When disposal of a museum object is being considered, the museum will establish if it was acquired with the aid of an external funding organisation. In such cases, any conditions attached to the original grant will be followed. This may include repayment of the original grant and a proportion of the proceeds if the item is disposed of by sale.

Motivation for disposal and method of disposal:

e. When disposal is motivated by curatorial reasons the procedures outlined in paragraphs 1.13g-1.13s will be followed and the method of disposal may be by gift, sale or exchange.

f. In exceptional cases, the disposal may be motivated principally by financial reasons. The method of disposal will therefore be by sale and the procedures outlined below in paragraphs 1.13g-1.13m and 1.13o/s will be followed. In cases where disposal is motivated by financial reasons, the governing body will not undertake disposal unless it can be demonstrated that all the following exceptional circumstances are met in full:

- the disposal will significantly improve the long-term public benefit derived from the remaining collection
- the disposal will not be undertaken to generate short-term revenue (for example to meet a budget deficit)
• the disposal will be undertaken as a last resort after other sources of funding have been thoroughly explored

The disposal decision-making process:

g. Whether the disposal is motivated either by curatorial or financial reasons, the decision to dispose of material from the collections will be taken by the governing body only after full consideration of the reasons for disposal. Other factors including the public benefit, the implications for the museum’s collections and collections held by museums and other organisations collecting the same material or in related fields will be considered. External expert advice will be obtained and the views of stakeholders such as donors, researchers, local and source communities and others served by the museum will also be sought.

Responsibility for disposal decision-making:

h. A decision to dispose of a specimen or object, whether by gift, exchange, sale or destruction (in the case of an item too badly damaged or deteriorated to be of any use for the purposes of the collections or for reasons of health and safety), will be the responsibility of the governing body of the museum acting on the advice of professional curatorial staff, if any, and not of the curator of the collection acting alone.

Use of proceeds of sale:

i. Any monies received by the museum governing body from the disposal of items will be applied for the benefit of the collections. This normally means the purchase of further acquisitions. In exceptional cases, improvements relating to the care of collections in order to meet or exceed Accreditation requirements relating to the risk of damage to and deterioration of the collections may be justifiable. Any monies received in compensation for the damage, loss or destruction of items will be applied in the same way. Advice on those cases where the monies are intended to be used for the care of collections will be sought from the Arts Council England.

j. The proceeds of a sale will be ring-fenced so it can be demonstrated that they are spent in a manner compatible with the requirements of the Accreditation standard.

Disposal by gift or sale:

k. Once a decision to dispose of material in the collection has been taken, priority will be given to retaining it within the public domain, unless it is to be destroyed. It will therefore be offered in the first instance, by gift or sale, directly to other Accredited Museums likely to be interested in its acquisition.

l. If the material is not acquired by any Accredited Museums to which it was offered directly as a gift or for sale, then the museum community at large will be advised of the intention to dispose of the material, normally through an announcement in the Museums Association’s Museums Journal, and in other specialist journals where
appropriate.

m. The announcement relating to gift or sale will indicate the number and nature of specimens or objects involved, and the basis on which the material will be transferred to another institution. Preference will be given to expressions of interest from other Accredited Museums. A period of at least two months will be allowed for an interest in acquiring the material to be expressed. At the end of this period, if no expressions of interest have been received, the museum may consider disposing of the material to other interested individuals and organisations giving priority to organisations in the public domain.

Disposal by exchange:

n. The nature of disposal by exchange means that the museum will not necessarily be in a position to exchange the material with another Accredited museum. The governing body will therefore ensure that issues relating to accountability and impartiality are carefully considered to avoid undue influence on its decision-making process.

o. In cases where the governing body wishes for sound curatorial reasons to exchange material directly with Accredited or unaccredited museums, with other organisations or with individuals, the procedures in paragraphs 1.13a-1.13d and 1.13g-1.13h will be followed as will the procedures in paragraphs 1.13p-1.13s.

p. If the exchange is proposed to be made with a specific Accredited museum, other Accredited museums which collect in the same or related areas will be directly notified of the proposal and their comments will be requested.

q. If the exchange is proposed with a non-accredited museum, with another type of organisation or with an individual, the museum will make an announcement in the Museums Journal and in other specialist journals where appropriate.

r. Both the notification and announcement must provide information on the number and nature of the specimens or objects involved both in the museum’s collection and those intended to be acquired in exchange. A period of at least two months must be allowed for comments to be received. At the end of this period, the governing body must consider the comments before a final decision on the exchange is made.

Documenting disposal:

o/s. Full records will be kept of all decisions on disposals and the items involved and proper arrangements made for the preservation and/or transfer, as appropriate, of the documentation relating to the items concerned, including photographic records where practicable in accordance with SPECTRUM Procedure on de-accession and disposal.

Note on disposal of loaned material:

At the agreed time of loan return every effort will be made to contact the lender or their legal executor. Where this is not possible, the museum will hold the material for a period of 12 months.
The museum’s professional curatorial staff will then make a recommendation for collection or disposal. Standard collection / disposal procedures will then be followed.

Note on disposal from the handling collection:

The museum may dispose of handling collection material by destruction if it is broken or worn out beyond repair in the course of its use. If the museum finds that it cannot use items in the handling collection regularly, they may be disposed of even if they are in good condition. The museum will always try to contact the donor to make them aware of the disposal proposal. Full records will be kept of all decisions on disposals.

2. Care and Conservation Policy

2.1 Care and Conservation Policy Statement

Croydon museum & archives collects, conserves and interprets Croydon's cultural heritage to enable individuals and organisations to take part in creative and enjoyable learning experiences.

The Care and Conservation Policy plays a key role in the fulfilment of this vision by providing a framework for:

- The preservation of the collections in the care of the museum
- Preventative and remedial conservation of the collections
- The safe use of and access to collections, within the limits of the museum’s resources

It is Croydon Museum & archives’ policy to work with its collections, visitors and environment to ensure that:

- All museum and collections documentation is maintained to SPECTRUM standards
- The care of the collections is the responsibility of everyone who works in or visits the museum
- Researchers or other visitors working with the collections are briefed on how to handle the items they are working on and are supervised at all times
- The museum trains all staff and volunteers who handle the collections in the course of their work – no untrained personnel are allowed to handle items from the collection
- All items should be handled as little as possible. When it is necessary to move objects, for example, during cleaning, then cotton gloves are always used
- Collections are to be held in stable conditions. Remedial conservation should only be carried out if an item is seriously deteriorating, is endangering other things or is required for display
- No item in the collections will be modified or altered until advice has been obtained from a suitably qualified conservator
- Only suitably trained and qualified conservators will carry out interventive treatment on objects
- The museum will check the suitability of conservators chosen to work (or advise) on the collections. A professionally accredited conservator or a conservator listed on the Conservation Register will normally be chosen (a list of preferred contacts is provided in section 2.2.3 Remedial Conservation)
The museum keeps detailed records of all treatments carried out on objects, including the name and contact details of the person or company who undertakes the work.

The Care and Conservation Plan sets out the way the policy will be put into action, and should be read in conjunction with the Collections Development Policy, Documentation Plan, Forward Plan and Emergency Plan.

2.2 Care and Conservation Plan

2.2.1 Collections Condition Overview

<table>
<thead>
<tr>
<th>Collection</th>
<th>Condition and Storage Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oral history collection</td>
<td>The oral history collection is fundamental to the museum’s displays, and forms the basis for future collecting (see the museum’s Collections Development Policy section 1.3 for further details). The digitisation of the oral history collection is currently seen as a collections management priority (see section 2.2.5 Oral History Collection and the Documentation Plan and Review, Section 3.2.8 for further details).</td>
</tr>
<tr>
<td>Croydon Art Collection</td>
<td>At present (July 2013), very little of the art collection is on display, although a new exhibition area is scheduled to open in September 2013. The art that is on display in the museum is mounted and framed and the environmental conditions (see section 2.2.3.1) are controlled and monitored. The remainder of the collection is maintained in the museum store (see proceeding section for further details).</td>
</tr>
<tr>
<td>Riesco Collection of Chinese ceramics</td>
<td>At present (July 2013), 24 pieces of the 233 piece collection are off-site in secure storage for insurance purposes. The remaining collection is housed in the environmentally controlled and monitored Riesco Gallery within alarmed cases. There are no care and conservation issues for the collection beyond the insurance issues outlined above.</td>
</tr>
<tr>
<td>Pre-1800 social history and archaeology collection</td>
<td>This collection is currently held within the museum store in acid free boxes and surrounded by acid free tissue. The collection is secure and stable.</td>
</tr>
<tr>
<td>Social and cultural history collection</td>
<td>This collection is split between display in the museum of Croydon and storage in the museum store. The collection is stable in storage, and subject to regular condition checks on display (see section 2.2.3.5 for further details).</td>
</tr>
<tr>
<td>Handling collection</td>
<td>The handling collection is kept between the education store in the activities room and the</td>
</tr>
</tbody>
</table>
museum store. The location of objects is recorded as and when pieces are moved for handling and education sessions. The collection is in mixed condition (as is to be expected of this type of collection) though regular condition checks are undertaken by the Learning and Interpretation Officer in conjunction with the Collections Officer to ensure that the condition of the objects is fit for purpose.

2.2.2 Storage

The long-term collections and those on loan should be stored in the environmentally stable, controlled and monitored museum store. The handling collection that is in use should be stored in the education store cupboards in the activities room. The remainder should be stored in the main museum store. The collections should be housed in the following ways:

- Art collection – framed works hung on pull out picture racking. Unframed oils should be stored on static racking. Unframed works on paper should be stored in solander boxes.
- Handling Collection – where possible, objects should be stored in low acid cardboard boxes with acid free tissue. Textiles should be stored in acid free costume boxes or on padded hangers with made to measure Tyvek bacs.
- Oral history recordings – these should be stored in purpose made boxes (see section 2.2.5 for further details).
- Photographs – these should be stored in archival slide storage sheets in ring binders.

2.2.3 Preventative Conservation

2.2.3.1 Environmental Monitoring

a. Temperature and Relative Humidity

The museum spaces, along with the remainder of Croydon Clocktower, are served by one boiler system, providing both space heating through two hot water circuits (one constant and one variable temperature) and the domestic hot water service, and one water chiller system, providing space cooling, through a chilled water circuit.

There are two air systems serving the museum spaces, consisting of two constant volume air handling units (AHUs) which take outside air, filter it and then heat, cool de-humidify and humidify it as required and supply it to the museum spaces at the required condition to maintain the desired temperatures and relative humidity.

There is a Trend building management system (BMS), which indicates that the two systems, designated Museum A and Museum B, operate on a zoned re-heat, re-humidify principle.

Front of house volunteers monitor the temperature and relative humidity on a day-by-day basis, and any fluctuations outside of the acceptable norms are reported to the Collections Officer.
The Collections Officer is also responsible for uploading data from Hanlog monitors to the museum’s server, and for producing monthly reports outlining variations outside of acceptable norms.

Humidity should be maintained at 55% + or – 5% and temperature at 19 degrees Celsius + or – 1.5 degrees. Recordings outside of these norms are reported to Interserve – who manage the building – via the MAX helpdesk on extension 61858. Issues with air conditioning can then be chased up directly with Interserve technicians if it is deemed necessary by museum staff.

Technicians are contacted via: trevor.carter@interserve.com or david.tyler@interserve.com

b. Light Levels

Lighting on displays and in cases should be low in lux, UV and heat output. Textile and paper objects should be displayed in a maximum of 50 Lux and other objects in a maximum of 200 Lux.

Before displaying any new work or object, a light reading is taken in the proposed area of display by the Collections Officer to ensure the suitability of the light levels.

Natural light has been excluded from the galleries and the museum store. The Collections Officer carries out an annual lighting check and review.

2.2.3.2 Housekeeping

Both the Riesco Gallery and the main museum galleries are cleaned regularly by front of house volunteers under the supervision of the Collections Access Officer according to the cleaning schedule. The following guidelines are provided for the housekeeping of each exhibition space:

a. Museum of Croydon

- Use a duster to clean wooden parts of doors.
- Use universal cleaner and cloth to clean glass in doors when necessary.
- Use universal cleaner and cloth to clean steel plates on doors and lift doors on mezzanine when necessary.
- Clean outside of cases with universal cleaner and cotton cloth.
- Clean inside of cases with universal cleaner and cloth. (It is best to do this when light bulbs need to be changed inside cases.)
- Use flat dusters to dust between and on top of cases.
- High cases need to be vacuumed on top of as often as possible as a lot of dust settles on them. You need to use hip mounted vac with soft brush attachment. This needs to be done when you have two people as somebody needs to hold ladder while the other person vacuums.
- Clean Plasma screens with a lambs wool duster, if there are marks on them use universal cleaner and a clean cloth.
- Clean kiosk cases with universal cleaner and a cloth.
- Clean kiosk screens with universal cleaner and a cloth.
- Clean glass on mezzanine when necessary.
• Clean computer screens with universal cleaner and clean cotton cloth.
• Clean around computers with duster. Remove any marks with hard surface cleaner.
• Dust the rail around the mezzanine and banister on spiral staircase.
• **Clean lift door with stainless steel cleaner when necessary (once back in action)**
• Use lambs wool duster to dust the skirting around the gallery, dust all fire extinguishers.
• Floors need to be dry mopped every day when possible.
• Vacuum the gallery floors, spiral stair case treads and mezzanine floor once a week
• Remove any marks on floor with a damp cloth.
• Wash floor when necessary using large mop and bucket with the mechanical wringer.
• This is stored in the Museum of Croydon cleaning cupboard at the front of the gallery.
• **There is a container of PRO4 which is stored in the locked cupboard in the cleaning cupboard at the front of gallery. You need to add to water in your mop bucket follow directions on bottle.**
• Make sure the mop is well wrung out. Too much water raises humidity and also the floor needs to be dry for when the public come in. There is a wet floor sign in the cleaning cupboard at the front of the gallery.
• Buff the floor if necessary, if the mop is well rung out this is not usually necessary.
• Check the walls for dirty marks if there are any remove them with a damp cloth.
• The air conditioning pipes beneath the mezzanine need to be vacuumed once a fortnight; (this should be done when tops of cases in area 5 and 7 are being done).

b. **Riesco Gallery**

• Use universal cleaner & a clean cotton cloth to clean the outside of the glass in the wall cases and the central case, this needs to be done every day when possible or at least every other day.
  (Case insides need to be done once a year):
• Collect museum boxes and tissue paper from museum store.
• Line boxes with tissue paper to protect objects.
• Collect brushes to clean objects while they are out of cases.
• Collect keys to open cases from (deliberately left blank)
• Take alarm off before opening cases.
• In the Riesco cupboard there is a clamp to secure doors while you are in there.
• Place boxes on the floor out of your direct path to cases.
• Take off any jewellery that may knock or scratch objects.
• Very carefully remove objects from shelves, remove any removable parts (e.g. lids)
• Support objects from underneath when carrying them, never carry objects by their handle or fragile parts (e.g. arms of a statue.) Place in a tissue lined box, do not put to many objects in a box and place tissue between them. Clean inside cases using universal cleaner and a clean cotton cloth.
• It is better not to use gloves but to make sure you have clean hands.
• When you have cleaned the case, replace the objects and lock the case.
• When you have finished do not forget to reset alarm.
• Use the lamb’s wool duster to dust the doors.
- Use universal cleaner and a cloth to clean stainless steel on both sides of the door.
- Check the glass in the door wall and clean when necessary using universal cleaner and cotton cloth.
- Inside of glass to be cleaned approx twice a year, as per monthly cleaning schedule.
- The inside of door frame needs cleaning twice a year.
- The floor needs to be vacuumed every day if necessary.
- Stains on the floor can be removed using hard surface cleaner.
- Wet mop the floor when it necessary.
- Make sure the mop is well rung out, so that it has time to dry before it needs to be opened to the public.
- Use the buffing machine to buff the floor this is kept in the Museum of Croydon cleaning cupboard (E2 key).
- Clean behind red panels below cases and the panels themselves twice a year, as per cleaning chart.
- You will need to turn off the alarms before you start.
- Take the budget key out of the key press to open red panels it is best to do this when there are two of you as the panels are quite heavy. Vacuum under cases wipe red panels with a damp cloth and replace panels. Don’t forget to reset alarm.
- To clean above cases you will need two people. Do this on a Monday when closed to the public. Don’t forget to turn off alarms before you start.
- As a duo, remove the panels, when this is done vacuum above cases and replace panels.
- Clean inside central case after each exhibition, using the museum case vacuum cleaner.
- Use universal cleaner and cloth to clean glass in doors.

2.2.3.3 Pest Control

There are currently 60 insect traps between the Riesco Gallery, Museum of Croydon, Museum Store and Archive Store. They are checked once per fortnight for any insect infestation and a record is made in the Insect Trap forms. These forms are then used to update the Trap Monitoring spreadsheet on MUSHERIT. The traps should be replaced regularly as required.

The Collections Officer is responsible for liaising with pest control services if required.

2.2.3.4 Cleaning of Objects on Open Display

Cleaning of objects on display should only be undertaken by suitably trained staff. In the instance that it is required, the following procedure should be followed:

a. Look carefully to see if it needs cleaning, as objects are displayed in cases they are reasonably well protected from dust and insects.
b. If it looks clean and there is no change from last condition check, return it to its case.
c. If it needs cleaning we have a selection of brushes that are labelled for different objects e.g. metal, paper etc. We also have a museum vac with different brushes for larger items.
d. If the object has deteriorated since the last time it was checked, fill in a condition check form and let the Collections Officer know.

e. Use brushes to brush dust gently from objects into the nozzle of the museum vac.

f. If the object is delicate, with paint or parts that might fall off, put net over the end of the nozzle on vacuum cleaner, if anything does come loose it will not go into vacuum cleaner bag.

g. Larger items e.g. costumes can be vacuumed with the museum vac.

2.2.3.5 Condition Checking and Documentation

Condition checking should only be undertaken by suitably qualified staff. All condition checks should be recorded on CALM for accessioned objects, and within the loans database for all material that has been loaned to the museum.

When condition checking objects the following principles and procedure should be adhered to:

a. It is best to check the condition of objects at the same time as you are changing the bulbs in the cases displaying them.

b. Take off any jewellery which might catch in fabrics or scratch or knock objects – e.g. Rings, bracelets, watches, long necklaces or card keys. Be careful if you have a belt on as the buckle may catch on objects. It is best when possible to wear an overall. Also be careful of loose clothing (wide arms or scarves).

c. Handle all objects with care if they are very fragile. Make sure you have a box lined with tissue to transport the object to the place you will be condition checking it.

d. If it has any removable parts (e.g. a lid) remove them first and place them in the box.

e. Make sure that you put tissue between objects so that they cannot damage each other.

f. Support object from underneath, and never carry any object by its handle or other fragile parts.

g. Refer to last condition check form to see if the object has deteriorated at all. Wear cotton or latex gloves when handling metals and gilded picture frames. If you are not wearing gloves make sure your hands are clean.

2.2.3.6 Materials on Display

Materials on display should be cleaned following the guidelines set out above. The following additional considerations should be taken into account for objects in the Museum of Croydon:

- **Objects in area 2**

  a. **Madame Jardine’s shop**: This is on loan from Museum of London as it is delicate it has no lighting in case, unless you think it may have insect infestation there is no reason to open this case.

  b. **Iguana**: This object should be cleaned once a year by a conservator. If this is not possible it should be stood on white paper and brushed very gently in the direction of scales, check to see nothing has come off when finished.
c. Tenisonian Magazine: This object needs to have the page turned about every six months.

d. Pickwick Papers: This object needs to have the page turned about every six months.

e. John Shakespeares phrasebook: This object needs to have the page turned about every six months.

f. Geoffrey Kershaw’s diary: This object needs to have the page turned about every six months.

g. Petherick family album: This object needs to have the page turned about every six months

- Objects in area 3

a. Cicely Mary Barkers Book: This object needs to have the page turned about every six months.

- Objects in area 4

a. Enid’s Cook Book: This object needs to have the page turned about every six months.

b. Beech House school’s book: This object needs to have the page turned about every six months.

- Objects in area 5

a. Ray’s photo album: This object needs to have the page turned about every six months.

b. Bubble Car: Use a little syperonic N in water on a well rung out cloth to clean the paintwork of the bubble car. If the paintwork needs polishing, use an ordinary car polish. Clean the windows with universal cleaner. Vacuum the inside of the car to discourage insects. This needs to be done about once a year.

- Objects in area 6

a. Henry Mugowa’s A to Z: This object needs to have the page turned about every six months.

2.2.4 Remedial Conservation

Our policy is to ensure that everything is held in stable conditions. Remedial conservation should only be carried out if an item is seriously deteriorating, is endangering other things, or is required for display.

In the case that remedial conservation is required, only suitably trained and qualified conservators will carry out treatment on objects.

<table>
<thead>
<tr>
<th>Specialism</th>
<th>First name</th>
<th>Surname</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Textiles</td>
<td>Poppy</td>
<td>Singer</td>
<td>01206 252 376 / 0208 806 3742 (NB: not for late night callout)</td>
</tr>
</tbody>
</table>
2.2.5 Oral History Collection

Oral history recordings exist on analogue and digital audio tape and are being transferred to CD as an ongoing process as the tapes have a very limited life. Oral history recordings should eventually all be burned onto archival quality CDs and saved as both a Wav. Master file and an MP3 file. The CDs are stored in the museum store and the electronic versions on the museum server.

One recording only should be burned onto each CD. Tracks should not be combined on CDs.

The CD and its cover should be clearly marked with the unique number of the recording and the name of the interviewee before being filed in the museum store.

The sound recording itself is considered to be the museum object. The media on which it is stored should be considered its packaging. Therefore the museum aims to preserve the recording and may transfer it onto different media to achieve this. The unique museum number belongs to the recording and stays with the recording regardless of the format in which the recording is held or the medium on which it is stored.

3. Documentation Policy

3.1 Documentation Policy Statement

Documentation underpins every aspect of the museum’s activity. The accurate recording of collection information allows us to be accountable for the collections, their accessibility, management, research, study and use.

This helps Croydon museum & archives to collect, conserve and interpret Croydon's cultural heritage to enable individuals and organisations to take part in creative and enjoyable learning experiences.

Our policy for the documentation of the collections is to ensure that the information we hold relating to the collections is accurate, secure, reliable and accessible.
The aim of this policy is to ensure that we fulfill our guardianship, stewardship and access responsibilities. Through implementation of this policy, our objective is to:

- Improve accountability for the collections
- Maintain at least minimum professional standards in documentation procedures and collection information (see section 3.3 for how documentation procedures are mapped to SPECTRUM standards)
- Extend access to collection information (see section 3.2.8 for current priorities)
- Strengthen the security and the sustainability of the collections

The museum will follow the accountability principles defined by the Museums and Galleries Commission;

"to enable museums to fulfill their fundamental responsibilities for collections and the information associated with them. The principles are that a museum should know at any time exactly for what it is legally responsible (this includes loans as well as permanent collections), and where each item is located." (MGC 1993)

The museum is committed to record significant information about the objects in our care so that each object we are legally responsible for (including loans as well as long term collections) can be identified and located.

We will document our collections to either Inventory or Catalogue level, as described below:

- Inventory level: This includes sufficient key information to allow any object(s) in our care to be individually identified and verified. All accessioned items, loans inward and outward, and any other unaccessioned objects as appropriate are documented at this level.
- Catalogue level: We will identify the collections/objects that merit further, more detailed, documentation, thus raising the standard of information to catalogue level. Such documentation will include the known history of an artifact, and references to any relevant publication etc.

The museum backs up paper accession records in a secure off-site facility, and frequently updates its CALM collections cataloguing software to guard against the obsolescence of electronic collections data.

3.2 Documentation Plan

3.2.1 Object Entry Procedure

a. SPECTRUM Procedure: Object Entry

Museums are expected to take the same care of objects not belonging to their collections as they would of their own objects. They might be held liable for loss of or damage to, objects whether solicited or not. Entry records log every item which is left in the care of the museum at the time of its arrival. Entry documentation should be applied to all potential gifts or purchases, and items to be identified, even if they will only remain in the museum for a short time.
b. **Description of Current Object Entry Procedure**

All objects entering the museum are recorded using an ‘Object Entry Form’. Blank copies of these forms are stored within MUSHERIT and are uniquely numbered. Each form should be signed for by a member of the museum staff and the unique number of the form recorded.

The forms are photocopied and a copy is passed to the lender/donator.

The forms must be completed by a member of the museum staff, paying particular attention to:

Name and contact details of the donor.

Accurate description of the object, which must be sufficient for the object to be identified from the description alone (i.e. ‘computer’ is NOT sufficient; ‘AMSTRAD XMD5 computer, model number AMPC9876789-0, with keyboard and screen, all in black plastic casing IS probably sufficient).

Reason for item(s) entering the museum.

An agreed date of return / decision on acquisition.

A temporary number should be allocated using the following method: t / form number / a-z for separate items from the same donor are listed on the same form i.e. t/2000/a

Once completed the form should be signed by the depositor / owner and a member of the museum staff. It should then separated and stored as follows:

Original – filed in running order in locked filing cabinet, corridor above museum store (temporary location).

Photocopy – given to donor.

A copy of the information contained within the entry form is then recorded on CALM.

c. **Benchmark to Spectrum**

- Terms and conditions – on the back of object entry form
- System to allocate unique numbers to all objects is in place
- A system is in place to allow the museum to easily locate objects left in its care.
- Receipt for depositor is produced from the receipt form
- The extent of Museum’s liability is stated in the terms and conditions on back of receipt form
- Reason for entry stated on object entry form
- End date for deposit is stated on object entry form
- Depositor and owner contact details are captured where necessary, and there are clear steps to return object in place (see section 3.3 Documentation Procedural Manual)
- Museum staff complete forms and time is allowed to check objects and records on entry
- Currently acquisition form is used to establish legal title when item is a potential acquisition.
- Object entry form is used to collect key information about the object.
- Details from the object entry form are used to make decisions about the object
d. Actions for Croydon Museum Service’s Object Entry procedure:

- Use CALM to track accessioned objects and ensure accuracy of recorded data

3.2.2 Acquisition Procedure

a. SPECTRUM Procedure: Acquisition

(a) Accession: The museum must maintain an accessions register which records the formal acceptance of items into the museum’s permanent collection, allocates a unique identity number, and provides sufficient information for collections management purposes.

(b) Security Copy of Accession Records: A second, back-up copy of the museum’s accession records must be created and maintained. Both registers must be held securely, with one available to authorised staff for reference and the other stored off-site. Where accession information is wholly computerised, it must be supported by a copy of key accession information produced in an alternative medium which meets proven archival standards. Updates must be made to the stored copy at regular intervals so that the two copies remain consistent.

(c) Marking and Labelling: Each accessioned item, or group of items, must be marked and/or labelled with its/their unique identity number in a way that is as permanent as possible without damaging the item.

b. Description of Current Acquisition procedure

Decisions on objects for acquisition are made by a panel which includes at least two members of the museum staff. Decisions on acquisition must be taken in light of the museum’s Collection Development Policy. Where an object does not meet the criteria set out in the Policy it may be offered, with the consent of the donor, to the Interpretation and Learning Officer for acquisition to the Handling Collection.

Objects which are acquisitioned to the Main Collection are allocated a unique number in the following format: m/year of acquisition/running sequence of number of objects acquisitioned that year, i.e. m/2013/1 will be the first object acquisitioned to the Main Collection in 2013.

Objects which are accessioned into the Handling Collection are allocated a unique number in the following format: hc/year of acquisition/running sequence of number of objects acquisitioned that year, i.e. hc/2013/1 will be the first object acquisitioned to the Handling Collection in 2013.

Once a decision has been made to acquire an object the following actions must be taken:

- Acquisition form completed by museum staff, preferably in the presence of the donor, and signed by a museum staff member and the donor.
- Object entered on CALM database by a member of museum staff who has received CALM training (see section 3.3 Documentation Procedural Manual). Once complete, a print out of each individual object record should be made and filed with the corresponding acquisitions form.
A thank you letter should be written and mailed to the donor along with the photocopy of the object entry form (if this was not given to them at the time of signing).

Copies of all correspondence relating to the acquisition should be made and filed by donor name in the marked filing cabinets in the corridor above the Museum Store (temporary location).

The object should now be placed in its recorded location and identified for marking with its accession number by a member of the museum staff. N.B. It may not always be possible to mark / label the object immediately but a list of objects which are awaiting marking / labeling must be maintained and all objects acquired each calendar year should be marked / labeled by 31 March annually at the latest.

Currently (July ’13) a bound, hard-copy of the Accession Register exists in four volumes: Volume 1 for the years 1992, 1994-95, 1997 and 1999; Volume 2 for the year 1993, Volume 3 for the years 2000-2008 and Volume 4 for 2009 to present. NB No objects were acquired in 1996 or 1998.

One copy of the archive quality paper and bound Accession Register (offsite) should be made at the end of each financial year (i.e. as soon as possible on or after the 31 March each year). One copy is stored in the fire-proof cabinet in the corridor above the Museum Store (temporary location) and should be updated by hand as each new object is accessioned.

c. Benchmark to Spectrum

✓ Currently acquisition form only requires confirmation of donation not transfer of title.

✓ Unique numbers are assigned to each object in the manner described above.

✓ Accessions registers are maintained on a regular basis

✓ Copies of correspondence, forms and receipts relating to the acquisitions procedure are maintained.

✓ Donors are made aware of the terms under which their object is accepted as they’re printed on the reverse of the acquisitions form.

✓ All accessioned items conform to the Acquisition Policy which ensures objects are legal and meet local codes of practice.

✓ Security copy of the accession register is currently stored offsite.

✓ The museum ensures each item has a unique accession number which is physically associated with it.

✓ The museum has marking and labeling guidelines which staff follow

d. Actions for Croydon Museum Service’s Acquisition Procedure:

• Update the Accession registers for the years 2012-13.

• Once for bound and stored copy in fire-proof cabinet in the corridor above the Museum Store (temporary location) at Croydon Clocktower. One for the offsite copy at Taberner House.

• Third copy of register is held on CALM database.
3.2.3 Location and Movement Control Procedure

a. SPECTRUM Procedure: Location and Movement Control:

The location and movement of items within the museum must be recorded.

b. Description of Current Location and Movement Control Procedure

The current location of all objects in the museum’s collections is recorded in the CALM database record for that object. CALM is set up to automatically log the location and movement history of each individual object.

c. Benchmark to Spectrum

- The normal location of objects is recorded in Calm
- When objects are moved from their normal location a movement record is completed in Calm
- Through Calm, staff can search for location information by object number and location name.
- A record of the objects movements internally and externally are created in Calm.
- The movement record in Calm keeps a record of the person who was responsible for moving the object.
- The Museum has a list of staff who are responsible for authorising object movements.

d. Actions for Croydon Museum Service’s Location and Movement Control Procedure:

- Audit collection in store to ensure CALM locations are accurate

3.2.4 Cataloguing Procedure

a. SPECTRUM Procedure: Cataloguing Procedure

Provision of appropriate indexing: The museum must maintain appropriate indexes or equivalent information retrieval facilities. The accessions register provides a method of retrieving information about items in the collection by their identity number. There must be at least one other method of retrieving information, such as by location, donor or subject classification, according to the needs of museum users.

b. Description of Croydon Museum & Archives’ Current Cataloguing Procedure

Alternative methods of retrieving information about an object in our collections are achieved using the CALM database.

These search facilities are made accessible to the public through:

- Enquiry to a member of the museum staff who can search the CALM database on their behalf
• The public can view select fields from the CALM database for all objects in the Museum of Croydon galleries through the search function which is available in the Museum of Croydon’s Memory Room and online at www.museumofcroydon.com
• The Riesco Collection can also be searched and viewed through the CMS on the public-facing gallery computer.

c. **Benchmark to Spectrum**

Objects under the museum’s care are catalogued onto the Spectrum compliant DS Calm database. This allows retrieval of:

- All the objects associated with a particular person or place.
- All the objects located in a particular place within the museum.
- All the examples you have of a particular type of object.
- All the objects associated with a particular theme or topic.
- All the objects of a certain date.

d. **Actions for Croydon Museum & Archives’ Cataloguing Procedure:**

- Create and follow data standard to allow for consistent data
- Deliver an 'online catalogue' for the Oral History Collection detailing access arrangements, restrictions re use and charges, by March 2014
- Make 100 paintings from the Croydon Art Collection accessible online, by March 2014 with key milestone in September 2013.

### 3.2.5 Object Exit Procedure

a. **SPECTRUM Procedure: Object Exit**

There must be a unique written record of any permanent collection item which leaves the museum premises. In the case of an object returning to its owner, (e.g. an unwanted offer of a gift) it will not be necessary to create separate exit documentation as the object did not enter the permanent collection and its removal will be logged on the appropriate entry form. In other cases a separate exit record will need to be created.

b. **Description of Current Object Exit Procedure**

Where an object has entered the museum but a decision has been taken not to acquire it, then the date of return should be entered on all copies of the ‘Object Entry’ form, all copies of the form are signed by a member of the museum staff and the donor and the object returned to its donor.

Where the above procedure cannot be followed (e.g. in the case of an anonymous donation) then the procedures outlined in the Collections Development Policy should be observed and if necessary expert advice (e.g. from MLA London) should be obtained as to how to proceed.
Where an acquired object is being considered for disposal for whatever reason, the Collections Development Policy should be referred to and followed in all instances.

c. **Benchmark to SPECTRUM**

- By following the disposal Policy all items leaving the museum meet legal and policy requirements.
- All items leaving the premises can be tracked through a copy of the Receipt Form and electronically through CALM.
- The Museum has a list of staff who are responsible for authorising object movements.
- A signature from the recipient is collected on the receipt and loan out forms.

d. **Actions for Croydon Museum & Archives' Object Exit Procedure**

- Continue to make all decisions on the disposal of objects from our collections with reference to the Collections Development Policy

3.2.6 Loans In Procedure

a. **SPECTRUM Procedure: Loans**

The museum must maintain records of all loans, whether incoming or outgoing. Loans should be for fixed terms and for a stated purpose. There may be an option for renewal at the end of the term. The phrase ‘permanent loan’ is ambiguous and must be avoided. The museum must operate an effective collection management regime which includes auditing loans on a regular basis. It is also advisable to review periodically the terms and conditions relating to all loans.

b. **Description of Current Loans In Procedure**

There are two main categories of objects on loan:

Objects displayed in the Museum of Croydon galleries: with c. 57 exceptions, these objects are on loan for display in the museum, rather than acquired by us. The majority are loaned to us by local people or by people with a Croydon connection. C. 12 objects are loaned to us from other museums. The majority of these loan agreements were originally negotiated in the mid 1990s for a period of 10 years. They were re-negotiated between 2004 and 2006 when the old Lifetimes gallery closed and the displays were re-developed to form the Museum of Croydon, which opened in September 2006.

At this time the majority of these new loan agreements were extended by ten years and will be due for review in 2015. At present (March ‘13) the loan agreements are stored in hard copy form in the corridor above the Museum Store (temporary location) and on an electronic loans database. It is essential that the information relating to these loan agreements, in particular their expiry date, is captured electronically via the Access Loans database at L:\CS\Musherit\Collections Management\Loans.
All objects on loan are recorded and managed using ‘Object Entry’ forms (see section 2.1) and are captured electronically via the Access Loans database at L:\CS\Mushert\Collections Management\Loans. Each loan is assigned a unique reference number.

c. **Benchmark to Spectrum**

- Loans in are managed using ‘Object Entry’ forms and an electronic database which record reasons for the loan request.
- The conditions on the reverse of the form state that the object will receive the same care as objects in the collection.
- Both the lender and borrower sign the form before the loan begins.
- Museum staff ensure that the terms of the loan are adhered to.
- All loans are for fixed periods of time.
- The loan process is managed on paper and via an electronic database.
- A written record of the loan is maintained on the receipt forms which are stored in lever arch files.
- Information is available to lenders from the Museum.
- Insurance is provided for all borrowed objects.
- By using an electronic database we ensure that up-to-date location information about the object is maintained.
- The environmental conditions are controlled and monitored daily.
- Information on the security of the galleries as detailed in UKRG Facility Report and security supplement is available to lenders.

d. **Actions for Croydon Museum and Archives’ Loans In procedure**

- Transfer all information regarding the duration and conditions attached to objects loaned for the Museum of Croydon galleries to new, combined database from Access Loans database by May 2014.
- Devise and establish a system for alerting museum staff to the imminent expiry of a loan agreement through the updated combined database (to replace existing system and consolidate information).

### 3.2.7 Loans Out Procedure

a. **SPECTRUM Procedure: Loans**

The museum must maintain records of all loans, whether incoming or outgoing. Loans should be for fixed terms and for a stated purpose. There may be an option for renewal at the end of the term. The phrase ‘permanent loan’ is ambiguous and must be avoided. The museum must operate an effective collection management regime which includes auditing
loans on a regular basis. It is also advisable to review periodically the terms and conditions relating to all loans.

b. Description of Current Loans Out Procedure

At present, only a relatively small number of loans out are agreed to by the museum.

All objects on loan are recorded and managed using the ‘Loans Out’ forms and are captured electronically via the Access Loans database at L:\CS\Musherrт\Collections Management\Loans. Each loan is assigned a unique reference number.

c. Benchmark to Spectrum

✓ Currently the museum does not have a loans policy
✓ Written agreements are signed by the borrower and lender
✓ Loans are made for finite periods of time
✓ The museum retains all loans out forms which details the borrower, venues, loan period and loan purpose.
✓ Croydon has a system to control all aspects of the loan process
✓ By signing the Loans out form the borrower confirms their intent and ability to provide acceptable levels of care and safekeeping for the object.
✓ The borrower insures the objects and the Museum is supplied with proof.

d. Actions for Croydon Museum and Archives’ Loans Out Procedure

- Refer in all instances to the museums’ Loans Policy
- Transfer all information regarding the duration and conditions attached to objects loaned from the Museum of Croydon galleries to new, combined database by May 2014.
- Devise and establish a system for alerting museum staff to the imminent expiry of a loan agreement through the updated catalogue (to replace existing system and consolidate information).

3.2.8 Documentation Plan and Review

a. Priority Actions to Meet Accreditation Standards

<table>
<thead>
<tr>
<th>Objective</th>
<th>Actions Required</th>
<th>By Whom</th>
<th>Resource implications</th>
<th>Timescale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use CALM to</td>
<td>Undertake initial</td>
<td>Collections</td>
<td>Closure of the</td>
<td>End of January</td>
</tr>
<tr>
<td>Track accessioned objects and ensure accuracy of recorded data</td>
<td>Full collections audit and subsequent annual sampling audits</td>
<td>Officer</td>
<td>Museum over two week period</td>
<td>2014 and annually thereafter</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>Acquisition</strong></td>
<td><strong>Update the Accession registers for the years 2012-13.</strong></td>
<td>Cross reference relevant data from paper and electronic records. Record in the appropriate registers.</td>
<td>Collections Officer</td>
<td>1 day</td>
</tr>
<tr>
<td><strong>Put in place annual updating of Accession Register</strong></td>
<td>Update onsite register and CALM database on object by object basis. Use this information to update off site register annually.</td>
<td>Collections Officer</td>
<td>1 day (annually)</td>
<td>December 2013 and annually in March thereafter</td>
</tr>
<tr>
<td><strong>Location and Movement</strong></td>
<td><strong>Audit collection in store to ensure CALM locations are accurate</strong></td>
<td>Undertake initial full collections audit and subsequent annual sampling audits</td>
<td>Collections Officer</td>
<td>Closure of the museum over two week period</td>
</tr>
<tr>
<td><strong>Object Exit</strong></td>
<td><strong>Continue to make all decisions on the disposal of objects from our collections with reference to the Collections Development Plan</strong></td>
<td>Reference and adherence to policy</td>
<td>Cabinet</td>
<td>NA</td>
</tr>
</tbody>
</table>
### Loans In

<table>
<thead>
<tr>
<th>Description</th>
<th>Responsible Officer</th>
<th>Duration</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer all information regarding the duration and conditions attached to objects loaned for the Museum of Croydon galleries to new, combined database from Access Loans database.</td>
<td>Collections Officer</td>
<td>Ongoing staff time</td>
<td>May 2014.</td>
</tr>
<tr>
<td>Export CALM and Access data, audit, consolidate and tidy, create new form within combined database including new fields and re-import data)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Devise and establish a system for alerting museum staff to the imminent expiry of a loan agreement through new combined database (to replace existing system and consolidate information).</td>
<td>Collections Officer</td>
<td>Ongoing staff time</td>
<td>System in place by May 2014, and monitored monthly thereafter</td>
</tr>
<tr>
<td>Creation of new forms for data entry and new reports for data monitoring</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Loans Out

<table>
<thead>
<tr>
<th>Description</th>
<th>Responsible Officer</th>
<th>Duration</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer all information regarding the duration and conditions attached to objects loaned from the Museum of Croydon galleries to new,</td>
<td>Collections Officer</td>
<td>Ongoing staff time</td>
<td>May 2014.</td>
</tr>
<tr>
<td>Export CALM and Access data, audit, consolidate and tidy, create new form within combined database including new fields and re-import data)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
combined database from Access Loans database by May 2014.

Devise and establish a system for alerting museum staff to the imminent expiry of a loan agreement through new combined database (to replace existing system and consolidate information).

<table>
<thead>
<tr>
<th>Objective</th>
<th>Actions Required</th>
<th>By whom</th>
<th>Resource implications</th>
<th>Timescale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop online catalogue for digitized oral history collection detailing access arrangements, restrictions re. use and charges</td>
<td>Audit current collection information and add museum themes and information records</td>
<td>Collections Officer with digitization volunteer</td>
<td>1 day per week in conjunction with ongoing digitization of oral history collection (see below)</td>
<td>March 2014</td>
</tr>
<tr>
<td>Digitize remaining c500 oral histories currently on tape,</td>
<td>Audit of current collections Development of</td>
<td>Collections Officer with digitization volunteer</td>
<td>1 day per week</td>
<td>March 2020</td>
</tr>
</tbody>
</table>

b. Actions to Exceed Minimum Requirements
### 3.3 Documentation Procedural Manual

#### 3.3.1 Object Entry Procedure

- **Accreditation standard definition for Object Entry:**

  There must be a unique written record of any item which enters the museum, whether for identification, loan or as a potential acquisition.

- **Scope Note**

  Any object entering the museum is subject to the Entry Procedure. For expected Loans In follow the Loans In procedure.

---

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible Officer</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Including providing and recording annotations and transcriptions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>and updating catalogue entries to include museum themes and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>information records</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make 100 paintings from the Art Collection accessible online</td>
<td>Carry out audit of digital</td>
<td>Collections Officer</td>
</tr>
<tr>
<td>(with a view to extending this to all paintings in the collection)</td>
<td>images</td>
<td>Ongoing staff time</td>
</tr>
<tr>
<td>Fill in gaps in digitisation</td>
<td>Build web infrastructure and/or link to existing CMS</td>
<td></td>
</tr>
<tr>
<td>Deliver training in use, updating, monitoring and reporting on data from CALM to all museum staff</td>
<td>Train front of house staff in use of entry forms, reports and searches</td>
<td>Collections Officer</td>
</tr>
</tbody>
</table>
c. Description of Object Entry Procedure

Entry Form:

When an object enters the Museum service an ‘Entry Form’ is completed to capture information about the object. A unique entry number is generated for each object.

The forms must be completed accurately by a member of the museum staff to capture the following pieces of information:

- Name, address and phone number of the depositor and owner where applicable.
- Accurate description of the object, which must be sufficient for the object to be identified from the description alone (i.e. ‘computer’ is NOT sufficient; ‘AMSTRAD XMD5 computer, model number AMPC9876789-0, with keyboard and screen, all in black plastic casing is sufficient’).
- A history of the object.
- Condition assessment.
- Reason for entry.
- An agreed date of return where appropriate.
- Record an insurance value or price where known.
- Signed and dated by depositor.
- Signed and dated by staff member.

Photocopy the form and give a copy to the depositor. File the Master copy in running order in ‘Incoming Objects’ folder in B4.

The objects are issued with unique temporary numbers allocated using the following method: t/form number/a-z for separate items from the same donor listed on the same form i.e. t/2106/a.

Processing the Object:

Use the digital camera stored in the equipment cupboard. To take a recognition shot of the object. Save the photo as a JPEG in the following directory on network. L:\CS\Musherit\Collections Management\Object Photos

Where possible link the object to its temporary number using one of the appropriate methods:

- Attach a Tyvek label to the object
- Place the object in a specimen bag which itself is numbered

Place the object into the Entry section of the store.

Transfer the details from the Entry Form to the Object Entry form in CALM (or Access Loans database), recording the current location of the object.

Returning the Object (for loans):

If not earlier, two weeks before agreed date is due make contact with the owner and follow the acquisition or exit procedure where appropriate.
3.3.2 Acquisition Procedure

a. Accreditation standard definition for Acquisition Procedure:

(a) Accession: The museum must maintain an accessions register which records the formal acceptance of items into the museum’s permanent collection, allocates a unique identity number, and provides sufficient information for collections management purposes.

(b) Security Copy of Accession Records: A second, back-up copy of the museum’s accession records must be created and maintained. Both registers must be held securely, with one available to authorised staff for reference and the other stored off-site. Where accession information is wholly computerised, it must be supported by a copy of key accession information produced in an alternative medium which meets proven archival standards. Updates must be made to the stored copy at regular intervals so that the two copies remain consistent.

(c) Marking and Labelling: Each accessioned item, or group of items, must be marked and/or labelled with its/their unique identity number in a way that is as permanent as possible without damaging the item.

b. Scope Note

This procedure is to be used for objects which the Museum would like to accession. Objects must go through the Entry Procedure first unless it is impossible to bring them into the museum before making a decision. E.g. when deciding to purchase an item from auction.

c. Description of Acquisition procedure

Making the Decision:

Decisions on objects for acquisition are made by a panel which includes at least two members of the museum staff. Decisions on acquisition must be taken in light of the museum’s Collections Development Policy.

Where an object does not meet the criteria set out in the Collections Development Policy it may be offered, with the consent of the donor, to the Interpretation and Learning Officer for the Handling Collection.

Declined Objects:

The Collections Officer should write to the owner and inform them of the decision. They should follow this up with a phone call one week later to arrange a mutually convenient time to collect the object. A copy of the letter should be made and filed in the object file.

On collection the owner should bring their copy of the entry form and all copies must be signed by the owner to acknowledge return of the object.

Accepted Objects – paperwork:

The Collections Officer should write to the owner to inform them of the decision, thank them and explain what happens next. This letter is accompanied by a Transfer of Title form and, where
applicable, Copyright Assignment agreements. A copy of the letter should be made and filed in the object file. Templates for all letters can be found on the shared drive here: L:\CS\Musherit\Collections Management\Documentation Procedures\Forms

If no reply has been received after three weeks the Collections Officer should telephone the owner to chase up the paperwork.

Accepted Objects – processing the object:

On CALM the object’s record must be updated to reflect its new status. To fulfill this a catalog record must be created which will generate its accession number. Accession numbers take the following format: M/year of acquisition/running sequence of number of objects acquisitioned that year, i.e. M/2007/1 will be the first object acquisitioned to the Main Collection in 2007. The catalog record should state the object’s current location and be embellished with all available information.

The object needs to be marked in accordance with the Collections Trust’s Labelling and Marking guidelines here: http://www.collectionslink.org.uk/manage_information/landm_guide

It may not always be possible to mark or label the object immediately but a list of objects which are awaiting marking or labeling must be maintained and all objects acquired each calendar year should be marked or labeled by 31 March annually at the latest.

File all of the object’s paperwork into the object file and include a copy of the CALM record.

Accession Register:

Three printed and bound editions of the Accession Register exists in three volumes: Volume 1 for the years 1992, 1994-95, 1997 and 1999; Volume 2 for the year 1993; Volume 3 for the years 2000-2008. This forms a complete record of all objects acquired since the museum Service was first established until the end of 1999 as there were no objects acquired in 1996 or 1998. One is located in the fire proof safe in the corridor above the museum store (temporary location). The records were generated from CALM and also exist in their digital form on the remote CALM server. From 2009 new accessions have been recorded in the Accessions Register by hand and also entered into the CALM database providing our offsite backup.

3.3.3 Location and Movement Control Procedure

a. Accreditation standard definition for Location and Movement control:

The location and movement of items within the museum must be recorded.

b. Scope Note

This procedure is to be followed for all objects that are under the museum's care. This includes accessioned items, loans and other items that have entry numbers.
c. Description of Location and Movement Control procedure

Recording:

The current location of all objects under the museum’s care is recorded in the CALM database record for that object. When an object is moved for a period greater than one working day, the CALM record is updated.

Additionally a Permanent location is recorded on CALM. This denotes the object’s usual location.

The system allows users to search for objects based on their current and normal location as well as their accession numbers.

For objects loaned to the museum, the same procedure is followed and the location updated on the loans database.

Accountability:

Anyone making an object movement must fill in the CALM record stating the new location, the date the object was moved and their name. If the object is on loan, the current location should be updated on the loans database.

Members of staff who can authorise object movements are:

- Museum & Heritage Manager
- Collections Officer

Gallery Items:

When an object from the gallery is removed, a gallery removal notice is created and placed into the display case. The notice states which object has been removed, a reason and an image. The template can be found on the shared drive here: L:\CS\Musherit\Collections Management\object movement.doc

Auditing:

Annually a sample of the collection is audited to ensure the system is working.

3.3.4 Cataloguing Procedure

a. Accreditation standard definition for Cataloguing Procedure:

Provision of appropriate indexing: The museum must maintain appropriate indexes or equivalent information retrieval facilities. The accessions register provides a method of retrieving information about items in the collection by their identity number. There must be at least one other method of retrieving information, such as by location, donor or subject classification, according to the needs of museum users.
b. **Scope Note**

This procedure is to be followed for all objects that are under the museum’s care. This includes accessioned items, loans and other items that have entry numbers.

c. **Description of Cataloguing Procedure**

Objects under the museum’s care are catalogued onto the Spectrum compliant DS CALM database or Access loans database. This allows retrieval of:

- All the objects associated with a particular person or place.
- All the objects located in a particular place within the museum.
- All the examples you have of a particular type of object.
- All the objects associated with a particular theme or topic.
- All the objects of a certain date.

### 3.3.5 Object Exit Procedure

a. **Accreditation standard definition for Object Exit:**

There must be a unique written record of any permanent collection item which leaves the museum premises. In the case of an object returning to its owner, (e.g. an unwanted offer of a gift) it will not be necessary to create separate exit documentation as the object did not enter the permanent collection and its removal will be logged on the appropriate entry form. In other cases a separate exit record will need to be created.

b. **Scope Note**

This procedure is to be used for all objects leaving the museum. This does not include museum equipment. For loans, see the appropriate Loans Procedure below.

c. **Description of Object Exit Procedure**

**Returning objects to owners:**

To return an object to its owner arrange for them to come to the museum to collect the object. Two exit forms are generated and both are signed in the following manner: The owner signs to acknowledge safe return of the object, and the museum’s representative signs to confirm the transaction. Museum staff need to record the Exit number onto the Entry Form against the relevant object(s).

One copy is left with the owner and the other filed in the object file. Ensure that the CALM (or loans database) record is updated to state that the object’s normal and current location is with the owner.
Disposal of objects not in permanent collection:

When it has proved impossible to contact the owner of an object the museum does not wish to keep, the procedures outlined in the Collections Development Policy should be observed and if necessary expert advice (e.g. from MLA London) should be obtained as to how to proceed.

De-accessioning and disposal of accessioned items:

Where an accessioned object is being considered for disposal, for whatever reason, the Collections Development Policy should be referred to and followed in all instances.

3.3.6 Loans In Procedure

a. Accreditation Standard Definition for Loans

The museum must maintain records of all loans, whether incoming or outgoing. Loans should be for fixed terms and for a stated purpose. There may be an option for renewal at the end of the term. The phrase ‘permanent loan’ is ambiguous and must be avoided. The museum must operate an effective collection management regime which includes auditing loans on a regular basis. It is also advisable to review periodically the terms and conditions relating to all loans.

b. Scope Note

Loans in are objects which enter the museum temporarily for research, exhibition or display

c. Description of Loans In Procedure

Receipt Form:

When an object enters the Museum service an ‘Entry Form’ is completed to capture information about the object. Unique entry numbers are assigned to each object, and link entries on the Access loans database to the paper records as well as to the item itself.

The forms must be completed accurately by a member of the museum staff to capture the following pieces of information:

- Name and contact details of the depositor and owner where applicable.
- Accurate description of the object, which must be sufficient for the object to be identified from the description alone (i.e. ‘computer’ is NOT sufficient; ‘AMSTRAD XMD5 computer, model number AMPC9876789-0, with keyboard and screen, all in black plastic casing is sufficient).
- A history of the object.
- Condition assessment
- Reason for entry e.g. Loan – exhibition title
- An agreed date of return where appropriate.
- Record an insurance value or price where known
- Signed and dated by depositor
- Signed and dated by staff member
A loan agreement can be issued at this stage if the depositor does not intend to issue one. Loan agreements can be found on the reverse of the Object Exit Form.

Photocopy the form and give a copy to the depositor. File the Master copy in the object file in the locked filing cabinets in the corridor above the museum store (temporary location).

The objects are issued with unique temporary numbers allocated using the following method: T/form number/a-z for separate items from the same donor listed on the same form i.e. T/2106/a.

Processing the Object:

Use the digital camera stored in the equipment cupboard. To take a recognition shot of the object. Save the photo as a JPEG in the following directory on network. L:\CS\Musherit\Collections Management\Object Photos.

Where appropriate link the object to its temporary number using one of the appropriate methods:

d. Attach a Tyvek label to the object
e. Place the object in a specimen bag which itself is numbered

Place the object into the museum store or straight into the gallery where appropriate.

Transfer the details from the Entry Form to the Object Entry and Access loans database. Record the current location of the object.

Loan Renewals:

Run the loans to renew query through the Access Loans database to track loan expirations L:\CS\Musherit\Collections Management\Loans. Where the museum would like to renew a loan, send out a copy of the renewal letter and form found here: L:\CS\Musherit\Collections Management\Loans\Renewals and save each batch in an appropriately named folder in the same directory.

Loan Returns:

Where the Museum or lender wishes to return the loan, the Exit Procedure must be followed.

3.3.6 Loans Out Procedure

a. Accreditation standard definition for Loans:

The museum must maintain records of all loans, whether incoming or outgoing. Loans should be for fixed terms and for a stated purpose. There may be an option for renewal at the end of the term. The phrase ‘permanent loan’ is ambiguous and must be avoided. The museum must operate an effective collection management regime which includes auditing loans on a regular basis. It is also advisable to review periodically the terms and conditions relating to all loans.
b. Scope Note

Loans out are objects which belong to the museum and are temporarily lent to another institution for conservation, research, exhibition or display. Where loans of objects from our collections are agreed the ‘Loans Out’ form and procedure is followed.

c. Description of Loans Out Procedure

The Museum will lend objects to other institutions but will require information about the purpose of the loan, duration and borrower’s environmental and security conditions before making a decision to lend objects. Typically it will require a completed UKRG facilities report and a signed loan agreement.

Exit Form:

Exit forms must be completed accurately by a member of the museum staff to capture the following pieces of information:

- Name and contact details of the person removing the object,
- Name and contact details of the recipient.
- Accurate description of the object, including condition assessment, ID number and an insurance valuation.
- Stated reason for the loan
- Date for return
- Signed by recipient and Museum representative.

The form is copied, with the master filed in the object file, and a copy given to the recipient.

Loan Agreement:

The Museum will issue a loan agreement which will include terms regarding insuring the items, transport arrangements and any costs involved. This can be found on the reverse of the Object Exit Form.

Condition Assessment:

The condition of the object will be assessed by a member of staff and where necessary a full report will be written and photographs taken by the Collections Officer.

Documenting Loans Out:

In the Access loans database, create a Loans Out record and attach it to the object. Complete the borrower record with information from the Exit form.

Enter date for return on Museum Outlook calendar.

Returning Loans Out:
When a loan is returned the Collections Officer will check the condition of the object against the condition report and the photograph.

The Exit form will be signed by a member of staff to confirm the objects were returned in good condition.

Finally the object’s loan and location record on Calm must be updated and the object relocated to its normal location.

### 3.4 Documentation Quick Reference Guide

#### 3.4.1 Accessing Object Information

To access the full information for any of our objects, you will probably need to find out its ID number from CALM. This is partly a security measure which means that only people with access to CALM (which is controlled) can access our full records.

1. Open Calm by double clicking on the desktop icon
2. Click ok when the Login screen appears already completed
3. Enter User ID
   - user
4. Enter Password
   - ********
5. Press OK
In the ‘Any text field’ type in your search term, and click Find.
| | The search function is not as good as Google so you may have to play around with search terms to find your object. |
| | |
| | Click on this icon to see all of your results. |
| | |
| | Then single click on the record you are interested in to read through it. |
| | |
| | The object id number should be at the top of the record. |
If you want any additional information about the object than you can find on CALM, try looking in the object history file. You’ll need the object ID number. If the number starts with an ‘M’ you need to look through the accessioned records which are in the top two drawers of the locked filing cabinet in the corridor above the museum store (temporary location). If the number starts with a ‘T’ you will want the bottom two drawers of the same filing cabinet.

The filing cabinet key locked within the cabinet in the LSL office (temporary location).

3.4.2 Finding an Object
Scroll down the calm record to the **CurrentLocn** part of the screen and read what it says in the greyed out Location field.

If it is in the gallery the code will look like this Museum of Croydon/Area2. The area relates to which part of the Museum the object is in.

If it is in the store it will start with Museum Store. The rest of the code means:
Museum Store/MEZ50/A:
Museum store/mezzanine level/bay 50/box A

Museum Store/PR1:
Museum Store/painting rack and rack number

Museum Store/RR2/C/80:
Museum Store/roller racking and rack number/shelf letter/box number

3.4.3 Entry Procedure

Please try your hardest **not** to accept any unsolicited objects but if you can’t get out of it follow the entry procedure.

The entry procedure should be used to record anytime an object enters the museum as donation, loan or for identification.

Open up this spreadsheet:
L:\CS\Musherit\Collections Management\Documentation Procedures\Forms\Entry form running numbers.xls

Enter the detail of this entry against the next available number.
Open the Entry form which is here:
L:\CS\Musherit\Collections Management\Documentation Procedures\Forms\entry_form.doc

Print off a double sided entry form and number it using the next available running number from Excel.

Then fill in your details, the depositor’s details, object information and complete the tick box explaining the reason for the deposit.

Make sure you both sign it.

Photocopy both sides, and give the copy to the depositor.

3.4.4 Exit Procedure

The Exit procedure should be used to record why an accessioned object or loan leaves the building. Exits should always be planned.

Open up this spreadsheet:
L:\CS\Musherit\Collections Management\Documentation Procedures\Forms\Exit form running numbers.xls
Enter the detail of this exit against the next available number.

Open the Exit form which is here:
L:\CS\Musherit\Collections Management\Documentation Procedures\Forms\exit_form.doc

Print off a double sided exit form and number it using the next available running number from Excel.

Fill in who has removed the object (could be a courier) and who received the object (could be a museum).

Complete the object information table as far as you can. Tick the relevant box about the reason for the exit. (Don’t worry about entering the loan conditions.)

Make sure you both sign it.

Photocopy both sides, and give the copy to the remover.

### 3.5 Loans Database Guide

Loans in are managed in the Access database located here:
L:\CS\Musherit\Collections Management\Loans\Loans2.mdb

All other electronic data is obsolete including CALM. Object history files contain current and historic documentation.
### 3.5.1 Opening the database

Open the database by navigating to `L:\CS\Musherit\Collections Management\Loans` and double clicking `Loans2.mdb`

Click **open** when the Security Warning dialogue appears

![Security Warning](image)

This file may not be safe if it contains code that was intended to harm your computer.
Do you want to open this file or cancel the operation?

[Open] [Cancel]

Make sure Forms is highlighted on the left hand side and double-click **Contributer1**
This is the main part of the database and probably the only bit you’ll need to use.

### 3.5.2 Searching for lenders

To search for a lender press ctrl+f or click the binocular icon.

Configure the search box options as below

- **Look in**: Contributor1
- **Match**: Any Part of Field
Type the first or last name into the box and click **Find Next** until you find the correct record.

On the screen you can see the lender’s name or their next of kin. You can also see information about the objects we have on loan. At the bottom of the screen you can see the lender’s address.

### 3.5.3 Creating new lenders

To add a new lender, click on this button at the bottom of the screen.

Fill in the lenders details according to the data standard.
### 3.5.4 Object and address information

<table>
<thead>
<tr>
<th>![Mouse]</th>
<th>If you want to edit an object or address you need to click on the <strong>Open Objects Form</strong> button or the <strong>Open Address Form</strong> button.</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Mouse]</td>
<td>To Add a new object to a lender whilst on the lender’s record, click the <strong>Open Objects Form</strong> button</td>
</tr>
<tr>
<td>![Mouse]</td>
<td>Click on this button at the bottom of the screen</td>
</tr>
<tr>
<td>![Keyboard]</td>
<td>Fill in the details about the object on the form.</td>
</tr>
<tr>
<td>![Mouse]</td>
<td>To ensure the object links to the correct lender, select their name from the <strong>Contributor</strong> drop down.</td>
</tr>
<tr>
<td>![Info]</td>
<td>If you have just added the lender’s details and they do not appear in the drop down list. Close the object record and return to the lender’s record. Use the arrows at the bottom of the screen to navigate to the next record and then come back to the lender you</td>
</tr>
</tbody>
</table>
are working on. Click on the **Open Object Form** again. Remove the filter by clicking on the funnel icon, then click the binocular icon to search for the object number. Now you should be able to link it to the correct lender.

To close the object form, click the red cross in the right hand corner of the window. Or if it’s maximised the black cross under the main window’s red cross.

The address form works in exactly the same way.

### 3.5.5 Searching for objects

If you want to search for any object from the object form. Launch the form by clicking on the **Open Object Form** button. And then click on the filter icon so that it is no longer coloured.

To search for an object press ctrl+f or click the binocular icon.
Configure the search box options as below

Look in – Objects

Match – Any Part of Field

Type in your search term into the box and click **Find Next** until you find the correct record.

### 3.5.6 Creating new object types

If you want to add a new type of object to the drop down list, you will need to edit the ObjType table. To do this go to the main database screen. Along the left hand side select table. Double click on ObjType.
This will open up the table which looks like an Excel spreadsheet.

To add a new term click in the empty cell at the bottom of the list and enter your term. Access will automatically assign a unique number to the ObjTypeID field for you.

### 3.5.7  Creating new associations

If you want to add a new type of association to the drop down list, you will need to edit the Association table. To do this go to the main database screen. Along the left hand side select table. Double click on Association.
This will open up the table which looks like an Excel spreadsheet.

To add a new term click in the empty cell at the bottom of the list and enter your term. Access will automatically assign a unique number to the AssocID field for you.

### 3.5.8 Loan Renewals

If you want to identify which loans are about to expire and need renewing you need to run the Loans to Renew report. To do this go to the main database screen. Along the left hand side select reports. Double click on Loans to Renew.
This will open a dialogue box asking you to enter a date.

Enter the date from which you want to start searching for loan renewals. (There are historic expired loans where we have lost touch with the lender). Normally enter the date from when you last renewed a batch of loans. Then click OK.

You will then see a similar box for you to enter the date from which you want to stop searching for loan renewals. Often this is the end of the following month.
You will then get a report from which you can see which loans need renewing.

3.5.9 Loan Returns

If you want to identify which loans need to be returned you need to run the Loans to Return report. To do this go to the main database screen. Along the left hand side select reports. Double click on Loans to Return.

This will open a dialogue box asking you to enter a date.
Enter the date from which you want to start searching for loans to return. (There are historic expired loans where we have lost touch with the lender). Then click OK.

Enter Parameter Value

Type the ending date DD/MM/YYYY

[Enter]

You will then see a similar box for you to enter the date from which you want to stop searching for loan returns. Often this is the end of the following month.

You will then get a report from which you can see which loans need returning.

End of document.