

SPRING '06

CMC

Newsletter
Spring Issue 2006

Collection Management Policies
REFINING THE COLLECTION:
Creating and Maintaining Collection Policies and Plans.

TAM Annual Meeting, Beaumont, Texas 2006

By Nicola Ladkin, Assistant Director
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POLICY: any plan or course of action adopted by a government, political party, business, or the like, designed to influence and determine decisions, actions, and other matters; a course of action or guiding principle considered to be expedient, prudent, or advantageous (*American Heritage Dictionary*).

COLLECTIONS MANAGEMENT POLICY: a detailed written statement that explains why a museum is in operation and how it goes about its business; it articulates the museum's professional standards regarding objects left in its care; serves as a policy guide for the staff and as a source of information for the public (Malaro, *A Legal Primer*).

Why adopt a collections management policy?

- provides guidance on meeting institutional legal (fiduciary) responsibility and accountability;
- provides direction for staff in work activities and responsibilities;
- provides guidance on consistent decision-making while allowing for flexibility when necessary;
- prevents mistakes being made that have no easy solutions;
- production and revision unites staff in self-evaluation and reflection;
- functions as an informal training tool for new staff;

- functions as an informational document for those outside the institution;
- is required for accreditation by the American Association of Museums
- is required for curatorial facility certification by the Texas Historical Commission.

How is an effective collections management policy produced and maintained?

- involve all staff in drafting and revising the policy;
- consult available resources and example policies;
- address/include all components essential to institutional requirements;
- tailor form and content to institutional needs;
- obtain formal approval of the completed document by the institution's board or entity charged with overall governance;
- provide every staff member with a copy of the policy and require that it be read;
- use the policy; revise the policy on a regularly scheduled basis.

What does an effective collections management policy contain and/or address?

- the purpose of the museum and its collection goals;
- the method of acquiring objects for the collection (acquisition and accessioning);

Collection Management Policies

REFINING THE COLLECTION:

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What does an effective collections management policy contain and/or address? (cont)

- the method of disposing of objects from the collection (deaccessioning and disposal);
- incoming and outgoing loans;
- objects left in the custody of the museum;
- the care and control of collections objects generally;
- access to collection objects;
- insurance procedures relating to collection objects; records that are to be kept of collection activities, when these records are to be made, and where they are to be maintained. (Malaro, *A Legal Primer*).
- Acquisitions
- Scope of Collections
- Legal title
- Held-in-Trust agreements
- Gift agreements/contracts
- Accessioning
- Deaccessioning
- Cataloging
- Loans
- Destructive loans
- Inventory
- Insurance
- Appraisals
- Access to collections
- Record keeping
- Collections care
- Conservation
- Disaster management/emergency preparedness
- Security (Texas Historical Commission, Curatorial Facility Certification program).

References/resources

This list is not comprehensive, but includes some very helpful resources.

American Association of Museums
2005 *Collections Stewardship*
<http://www.aam-us.org/museumresources/accred/index.cfm>
follow link to Collections Stewardship.

Cato, Paisley S., and Stephen L. Williams
1993 *Guidelines for Developing Policies for the Management and Care of Natural History Collections. Collections Forum*, 9(2):84-107.

Malaro, Marie
1985 *A Legal Primer on Managing Museum Collections*, Smithsonian Institution Press, Washington, D.C.

Museum of Texas Tech University
2006 *Collection Management Policy*
<http://www.ttu.edu/museumttu/> follow link to Collection Management Policy.

Phelan, Marilyn E.
2001 *Museum Law: A guide for Officers, Directors and Counsel*, (2nd edition) Kalos Kapp Press, Evanston, IL.

Simmons, John E.
2006 *Things Great and Small: Collections Management Policies*, American Association of Museums, Washington, D.C.

Texas Historical Commission
2004 *Curatorial Facility Certification Program Handbook*
<http://www.thc.state.tx.us/archeology/aacfc.html>
follow link to Handbook.

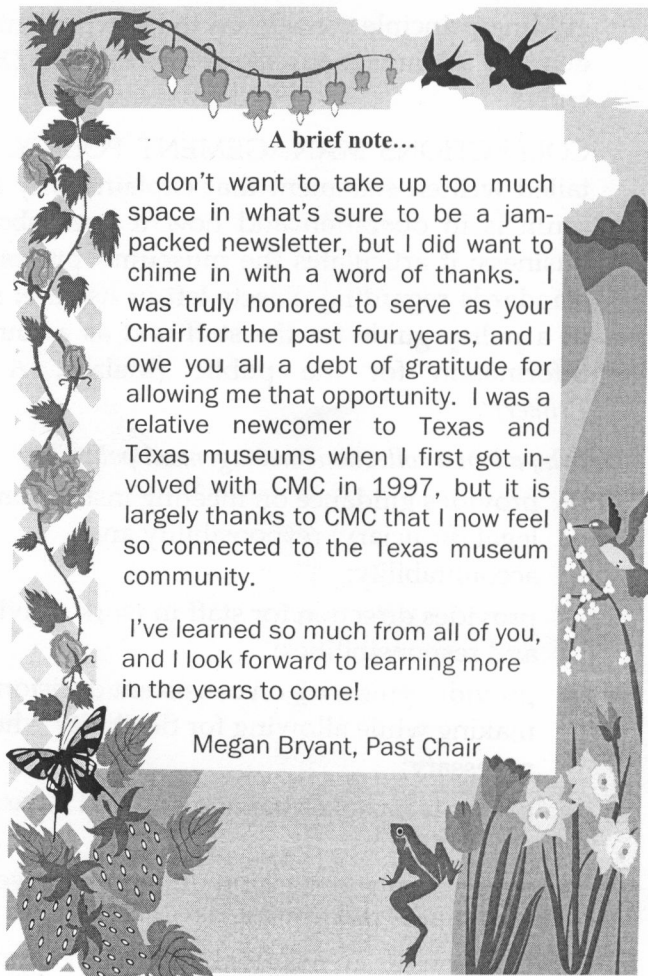
Williams, Stephen L.
2005 *Policy Theory and Application for Museums. Collections Forum*, 19(1-2):32-44.

A brief note...

I don't want to take up too much space in what's sure to be a jam-packed newsletter, but I did want to chime in with a word of thanks. I was truly honored to serve as your Chair for the past four years, and I owe you all a debt of gratitude for allowing me that opportunity. I was a relative newcomer to Texas and Texas museums when I first got involved with CMC in 1997, but it is largely thanks to CMC that I now feel so connected to the Texas museum community.

I've learned so much from all of you, and I look forward to learning more in the years to come!

Megan Bryant, Past Chair



FROM THE CHAIR

I hope everyone is enjoying the Spring. Remember to spend time outside now because soon it will be 100 degrees everyday! And while you are out there on your porch... sipping tea... or some cold wine... think of how wonderful it was to see all your Reggie-friends in Beaumont. (Reggie-friends is a term of endearment for all those who care for collections.) Seeing those Reggie-friends each year, spending time sharing the latest story about delayed shipments, strange acquisitions, non-existent budgets, lack of vacation time, the over-crowded schedule of activities, and so much more – makes my annual meeting experience worth it. Sharing and learning from each of you has made the last fifteen-plus years worth all the work, dust, tears, and the occasional paper cut.

CMC is all about you. And without YOU, we would not need or have CMC. I am honored to be Chair. I have always felt honored to be part of our group. I hope you feel the same way, and I look forward to hearing from you. Write to me with whatever you have in mind. Remember we need ideas for sessions for the next annual meeting. We need help with organization of workshops. We need your involvement to make our project ideas better.

Not all at once now...but do write letting us know what you want to participate in. Meanwhile, I look forward to seeing you in Waco this September for our next workshop "The Many Aspects of Collection Research."

Gabby

Doorstop or Necessary Museum Documentation? Furnishing Plans for Historic Houses

By Stacie Crosetto Flood
Curator, Kell House Museum

What exactly *is* a Furnishing Plan, and what does it do? These questions and numerous others were answered during the "Furnishing Plans for Historic Homes" session of the Texas Association of Museums Annual Conference.

The session was planned and chaired by Susan Smyer, who is currently the Collections Manager of the Battleship Texas State Historic Site but who has also worked in many other historic structures. Susan has found herself repeatedly asking, "Is this the way this museum is supposed to look? Is this the way these people lived?" These are the sort of questions that a Furnishing Plan is designed to answer.

Susan began by introducing Winnie Trippet, who works with the Chief Curator of the Texas Parks and Wildlife Department in Austin. Winnie then dove right into the material by defining a Furnishing Plan as "A site specific plan primarily used for houses to document a room-like space." The plan supports the mission statement and the interpretive plan for the site. It is the beginning, and answers many questions that all of us in historic buildings find ourselves asking daily.

The Furnishing Plan provides a single source for consistent and accurate information about the site. It is the basis for docent manuals, tours, and interpretive activities. It ensures the compliance with the site's mission statement. It is a guide for future planning, acquisitions, and deaccessions. It documents and explains how information was obtained (both the site and the collections) and how it is to be used. It allows for continuity and stability for the site during changes in staffing and organization. It is a tool for deflecting unwanted acquisitions. And, due to its size, it often serves as a good doorstop.

With everything that it can do, why don't we all have a Furnishing Plan? The process of undertaking the creation of one can seem like a daunting task. Thankfully, Winnie walked the attendees through the process.

First, the site and its needs should be assessed. The time period and interpretive theme should be determined first. This will provide a basis for the rest of the procedure. Then the space and contents should be evaluated, determining what, if any, structural changes need to be made. Photographs can be very useful in this

Doorstop or Necessary Museum Documentation? Furnishing Plans for Historic Houses *continued*

part of the process. All site documents should then be gathered and reviewed. An evaluation of how the site is currently interpreted and operated should be conducted to decide if any changes should be made to better present the site. And answers should be found to the questions: How will the site and objects be used? How do tours flow? What type of interpretation is best suited to the site?

Next, the scope of the project needs to be defined. This step includes obtaining proper approval, reviewing and evaluating funding, and determining who needs to be involved in the project and in what capacity. By this time the scope of the plan can really be determined. Asking questions is integral to the process. How much of your current collection is appropriate? If significant work needs to be done to the structure, where will the contents be housed? What is the format of the finished project (binder, bound, etc.)? And what will the process be for making changes and updates in the future?

To move on, detailed information will need to be gathered. All primary and secondary sources need to be collected. Copies of all plans, surveys, policies, tours, etc. will be needed. The catalog and accession records for all existing artifacts will also be required, as well as written descriptions.

In sitting down to actually write the plan, a framework needs to be built. The simplest way to do this is to determine the elements of the plan and make a table of contents. This should include an introduction (with information about the furnishing plan itself as well as the collections and plans for future collections), the historical background (including household inhabitants), the description of the historical building and architecture, the external features (wells, outhouses, etc.), and an appendix. A chronology should be developed, including significant changes in structures such as disasters, changes, change in use, and significant family changes.

All framework information should be taken into account when developing the plan room by room. It is helpful to organize information by room, noting references for style and reviewing available technology. Another suggestion Winnie had was visiting similar and related sites (sites from the same time period, economic standing, etc.). The objects wanted in each room should be listed based on history, dates, mission statement, theme, and budget. A detailed list of all objects that the Museum lacks, but needs, should be made, including options for what to use, in the case the preferred object cannot be found. Then a description of each room can be written, generally by style, characteristic, and typical room for each room and then specific for that particular site. This should also include the floor plan of the site as well as an object sheet for each object.

In finishing the Furnishing Plan, the remaining sections of table of contents should be completed and

the contents of the appendix compiled. Winnie strongly suggested having several people proofread the rough draft before printing and distributing. She also emphasized that the Furnishing Plan should be written, even if it isn't possible to implement it at the time.

Wally Saage, the Curator of Collections for the Heritage Society in Houston, followed Winnie at the podium. He emphasized thinking outside of the box, and spoke on how a disaster such as a flood, while not something any of us want to see, can also provide opportunities to implement new Furnishing Plans and introduce new technology.

Citing "A Public Trust at Risk" by the Heritage Trust and IMLS, Wally informed us that 20 percent of Collections Institutions in the United States have no environmental controls, 65 percent have experienced collections damage due to improper storage, 80 percent do not have emergency plans or staff to carry them out, 70 percent do not have a current assessment of the collections in their storage, and 77 percent do not allocate funds for preservation of the collections in their budgets. These statistics illustrate the point that we all have quite a lot to do and not enough funding to do it all. Wally reminded us that, though we are all "little guys," we still need to get the furnishing plan done so that we can be better prepared.

Using his personal experiences with the Pillot House, he discussed a flood that he dealt with, and how this let him incorporate more modern, less obtrusive technologies into the house. These helped return the home to the original look, as was preferred in the Furnishing Plan. Without a comprehensive plan in place at the time the disaster strikes, things will generally return to the way they were before the disaster. Research contained within the Furnishing Plan can help persuade Board members and docents to change the way a home is interpreted, he pointed out.

What is key to understand is that the Furnishing Plan is not "just a good doorstop," it's an invaluable tool for organizing and planning the collections of the museum housed in an historic structure, as well as guiding future restoration in the event of mishap or disaster.



Walk that Talk?

Interpretation in the Historic House Museum

by Robyn Lorraine Lee

Manager Historical Park of Denton County & Bayless-Selby

Walls form a gathering place, gathering together and forming a shelter within which lives are lived. It is the architecture itself, the placement of those walls, that marks the way, or truly guides one through a structure. I suggested that the Representative House Museum offers a unique opportunity to meet a particular interpretive challenge, one that highlights a way of life lived between all those walls, rather than any particular individual or family. The Bayless-Selby House Museum, in the Historical Park of Denton County, of which I am manager, is just such a museum. None of the furniture exhibited in the museum belonged to either the Bayless or Selby families, so stories from their point of view cannot be told. Instead, the museum is an artistic presentation of formerly-unrelated pieces now placed side by side. The interpretive lecture may also be an artistic presentation questioning all those possible worlds exhibited, linking to ideas of craftsmanship, tools required, colors used, why some and not others. The 2006 calendar for the very successful lecture/tour series that I present in the museum revealed some two dozen topics with somewhat fanciful titles such as "Victorian Wallpapers: 'What do we do with our walls?'" That was actually a question asked by art critic Clarence Cook in 1880, and "Victorian Hardware: What Closes, Locks & Latches." I attribute the success of these lectures to the intention that they be not only informative, but also that they allow the visitor an opportunity to pause for a moment to think about another time from the point of view of a way of life. Rather intense "looking" is required, but many visitors realize that, given the opportunity, walls, and the things gathered between the walls, may indeed bring meaningful expression once more to that which was "once" upon a time.

Barbara Judkins, Museum Educator at the Farmers Branch Historical Park, Farmers Branch, agreed that a way of life is often missed when visitors insist on knowing only "what" something is and perhaps "how" it worked rather than to ask "What would it be like to live with such an article as a spinning wheel?" "Who would spin?" "What would be spun?" A spinning wheel was a very good example, according to Barbara, of how to turn a phrase to tell stories about a way of life.

Ware Petznick had much to say, along with a wonderful power point presentation, about how to interpret from the point of view of generations of a family. The attendees of TAM and LAM were the first visitors to have seen the newly-restored third floor of the McFaddin-Ward House Museum in Beaumont for which she has been responsible since she became Curator in January 2005. The décor for the third floor focuses on the lives of the McFaddin men, Perry Jr. and Caldwell, who lived there during the late 1910s and early 1920s. Interpretation for this floor will differ significantly from that for the other two floors where the walls speak so strongly of the women, Ida McFaddin and Mamie McFaddin Ward. Ware noted that as in the Bayless-Selby House, so too at McFaddin-Ward, the third-floor interpretation will need to address the representational aspects of the stories to tell because the furnishings are not placed as the house had been lived in by the family.

I thank the Collection Managers' Committee for granting me the scholarship to help defray expenses at the TAM Annual Meeting in Beaumont.

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