

Template 1: Collections Rationalisation Policy

Please note that the commentary given in italics is for guidance and does not form part of the template.

Principles of collections rationalisation

Name of museum:

Date of document:

Document approved by:

'Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.'

Museums Association - definition of a museum

Definition of Collections Rationalisation

'Improving public benefit by refining collections in line with the museum's statement of purpose.'

Principles

1 Collections will be used to achieve our purpose

[Insert statement of purpose/mission statement]

2 Collections will be used effectively to benefit the public

Public benefit is achieved by using the collections for Display/ Research/ Handling/ Demonstration/ Spares/ Set dressing. This activity may be organised by the museum or by other organisations to which we lend items.

It is necessary, from time to time to reassess collections' potential for public benefit in relation to our purpose, plans and policies as well as to take account of changes to legal and ethical considerations. Our users will benefit from good collection management practices which improve the potential for the effective use of the collections.

3 Collection Rationalisation will cover a range of options

Benefit to the public must be demonstrated in the choice of option made. Alternatives, not in order of priority are:

Allocating items a different use within the museum

Returning items on loan

Recalling items on loan to other organisations

Converting loans to the museum to gifts to the museum

Disposal by gift to another Accredited museum or if this is not possible to other organisations or individuals

Disposal by sale to another Accredited museum or if this is not possible to other organisations or individuals

Disposal in cases of restitution, repatriation or spoliation

Disposal by recycling

Disposal by destruction – full or partial, in cases where no other option exists

4 Collections rationalisation will observe the ethical and legal considerations outlined in the Museum Accreditation standard and the MA Code of Ethics

Ethical matters relating to collections rationalisation include the process taking place:

- within a clearly defined collections policy
- on the advice of a range of staff (not an individual)
- when agreed by the governing body in the case of disposal
- with the intention that items remain in the public domain whenever possible
- when it is unlikely to damage public trust in museums

- when it is likely to increase public benefit deriving from the collections
- when financially-motivated disposal is only implemented in exceptional circumstances

Decisions made relating to collections rationalisation may be affected by legal restrictions arising from factors such as:

- legislation relating to the governing body of the museum [and its charitable status]
- legislation relating to the museum's collections
- the governing constitution of the museum
- museum management agreements
- conditions attached to gifts, bequests, purchases, loans and grants
- the ownership of items including those not yet accessioned into the collection

If doubts on legal restrictions exist, appropriate advice will be sought.

5 The collections rationalisation process and its documentation will take account of the requirements of the Museum Accreditation scheme, the MA Code of Ethics and the guidelines in the MA Disposal Toolkit

In addition to ethical and legal matters, the implementation of the rationalisation process must demonstrate that the requirements have been met and guidelines followed. The process will differ depending on whether items are to be permanently disposed of from the collection, whether they have or have not been accessioned into the collection or are on loan to or from the museum. Documentation requirements are given in the museum's Documentation Procedural Manual.

6 The selection of items for rationalisation and the choice of a new owner will be subject to formal processes and written criteria with assistance from appropriate specialists

Formal processes and criteria will ensure that consistency and transparency in collections rationalisation can be demonstrated. Specialist knowledge and advice will support the museum to make informed decisions on how the public benefit potential of items can best be achieved.

7 Our plans, policies and collection management arrangements will be reviewed and amended as necessary to reflect any changes in our approach to the development and use of the collections

Collections rationalisation provides an opportunity to review plans, policies and practices relating to acquisition, disposal, loans and other aspects of collection management to ensure that the collections are being used effectively for public benefit. Any changes made will be consistent with the prevailing Museum Accreditation standard and with ethical and legal considerations.

8 Public trust in the museum as holders of the collections will be maintained by consultation and communication

We recognise the need to raise understanding both inside and outside the museum of the public benefits arising from collections rationalisation. This includes respecting the sensibilities of those who have donated items to the museum, stakeholders and special interest groups.