

# Plan and prioritise for collections care

A Collections Care *How To* Guide



Plan and prioritise for collections care: a Collections Care *How To* Guide  
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# Collections Care How To Guides

This How To Guide is published by Norfolk Museums and Archaeology Service, in partnership with the Collections Trust. Collections care planning involves analysing and assessing your current activity against good practice guidance and the aims of your organisation and setting out achievable goals to improve the care of collections over time.

This guide will explore the role of planning in delivering effective collections care, and give guidance on achieving your goals by efficient planning



A Collections Care  
*How To Guide*



# How to Plan and Prioritise for Collections Care/

Effective planning involves input from people who will carry out the plan and is an activity that takes place at a variety of levels within a museum.

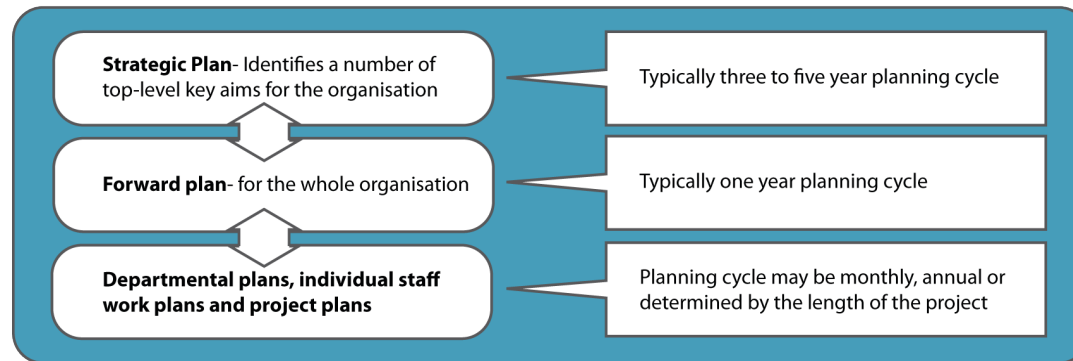
It is an ongoing process that involves :

- developing a written plan
- implementing the plan
- reviewing progress to allow for adjustment and improvement over time

No two organisations will have the same approach to planning, but it is common for museums to have a number of plans functioning at different levels within the organisation and spanning different time periods:

## How does collections care planning fit into the museum's planning cycle?

Every museum should create, implement and review a series of policies and plans which govern its collection care activities. These policies and plans flow directly from the museum's mission statement. This mission/policy/plan structure is often referred to as the 'collections management framework'. In a planning cycle policies and plans are reviewed to measure performance and re-assess goals.



Collections care planning falls into the category of departmental planning in the illustration above and in most cases a collections care plan will be for one year.

## Which areas of work are included in a collections care plan?

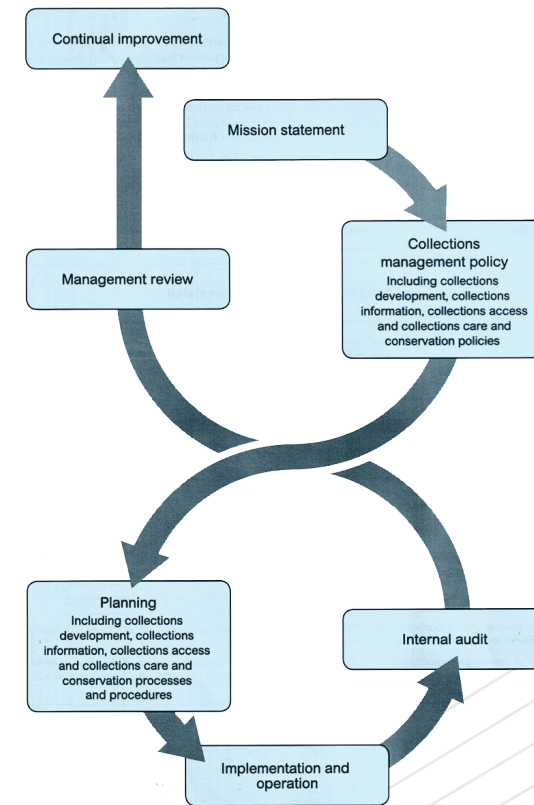
As a rough guide, a collections care plan may cover the following broad areas of activity:

### Preventive Conservation:

- Maintenance and improvements to the building
- Environmental monitoring and control
- Housekeeping and pest management
- Handling and moving objects
- Storage and display materials and methods
- Risk assessment

### Remedial Conservation:

- Object or collection condition assessments
- Planned programmes of treatment for objects



Collections management framework cycle of improvement taken from PAS197. Policies and plans are reviewed periodically to improve performance and re-assess goals

## The process of collections care planning

Planning effectively for collections care activity involves the following six steps:

1. Set up a planning team and a timetable
2. Review your current situation and the context for the plan
3. Review your current practice and define objectives
4. Establish priorities
5. Set achievable and measurable targets for improvement and reducing risk
6. Write your plan and share it

### Step 1

#### Set up a planning team and a timetable

Make sure you include relevant people in your planning activity,

to ensure that appropriate staff and/or volunteers have a say in priorities and feel a sense of ownership and involvement in the success of your plan. Allow and plan for adequate time for people to contribute to your plan.



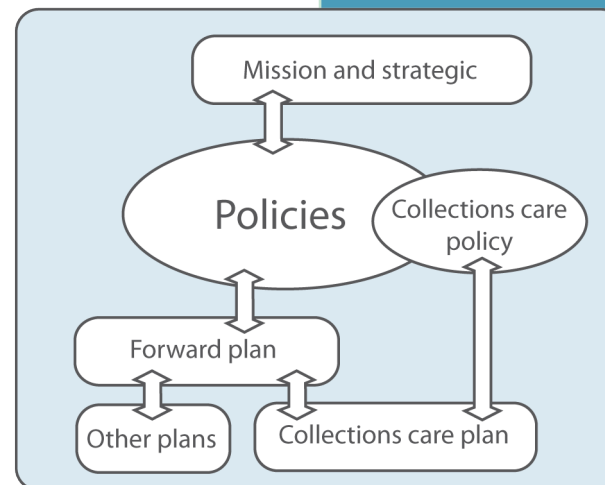
and any wider strategic plans and policies for the museum. This relationship between collections care planning and the wider strategies and policies of the museum is illustrated here-

If you are updating or rolling forward an existing collections care plan, you should take time to examine the success, or failure, of the objectives in the previous plan. At this stage in the process you should also identify any existing budget, or potential sources of funding.

### Step 2

#### Review your current situation and the context for the plan

You cannot plan a specific project, or aim for general improvement, unless you fully understand your starting point. All planning activity should include a review of current practice. This is a chance to reflect on current strengths and weaknesses in the context of your policy on collections care



# Step 3

## Review your current practice and



### define objectives

Once you have a clear overview of your current situation and understand the context, it is often helpful to use existing published standards, or examples of good practice, to help identify areas of need.

#### Use existing standards and good practice toolkits:

- The Museum Accreditation Standard – Accreditation requires museums to implement a Collections Care and Conservation Plan. Accreditation Guidance Sheet 3 contains more information about planning in the context of Accreditation requirements. (see page 11, Where can I find out more?)
- Benchmarks in Collection Care – this can be downloaded as an Excel Spreadsheet or as a pdf and provides a self-assessment checklist for museums, archives and libraries to measure their collections care policies, and activities. It is a useful tool when reviewing activity before creating a collections care plan. (see page 11, Where can I find out more?)

In your detailed review of current practice the broad areas to consider are:

- Collections condition checking
- Environmental monitoring
- Environmental control
- Suitable building – adaptation and maintenance
- Housekeeping
- Remedial conservation programmes

### Using Benchmarks in Collection Care

You may choose to make your own assessment of performance by simply using headings from Accreditation or from Benchmarks. However, many museums find it helpful to use *Benchmarks in Collection Care* to carry out a structured assessment, against which they can plan and measure improvement.

*Benchmarks* allows you to judge your current performance against three levels to get an overview of your current performance in each area. The assessment can be used to provide clear indicators for further improvement in each area. So, if you reach Basic in one area of activity, you can plan, if it is appropriate for you, and in the context of your museums strategic goals, to move to Good in that particular area.

#### Identify areas in need of work or improvement

Having carried out a detailed review under

different collections care headings, you will end up with a set of areas in which you can improve your collections care activities. These areas will be shaped into specific objectives in step 4.

### Old Stables Museum

#### Benchmarks assessment



#### Housekeeping

*We meet the Benchmarks 'Basic' level in all our housekeeping activity.*

*We plan to move to the 'Good' level in the following areas:*

- 1. Create a written cleaning specification for all storage and display areas*
- 2. Create a quarantine area for all incoming objects*

#### Environmental Monitoring

*To meet the Basic level we will do the following:*

- 1. Record and retain all environmental monitoring data we collect in the stores and display areas*
- 2. Review our procedures for calibrating environmental monitoring equipment*



# Step 4

## Establish priorities

### Write up your list of objectives



Once you have considered all sources of information available you and created a list of objectives you need to assess your objectives in the context of your strategic plans. Some objectives will be long term projects that extend beyond the life of your plan and others will be single tasks, however all objectives must be 'SMART'. You will probably not have the resources to achieve your list of objectives. So you will need to prioritise.

### So how do you prioritise?

There are many pressures on budgets and staff time and it important to consider collections care planning within the wider strategic priorities for the museum. For example: does the museum have an exhibition programme, or an active lending programme that might affect your priorities for remedial conservation? Possible sources of information to help you prioritise:

- Carrying out a Benchmarks in Collection Care assessment – this shows your performance against nationally developed levels and allows you to measure your progress in Basic, Good and Best levels of performance.
- Collection condition reports – these may be carried out on groups of individual objects or, may assess the storage and overall condition of groups of stored items. The reports might highlight the need for improvements in storage or for remedial conservation on individual items.
- Exhibition plans – planned exhibitions may have identified objects that require conservation before they can go on display.
- Loans requests – borrowing institutions may be responsible for the costs of conservation work prior to a loan taking place. Likewise, if you are borrowing material you may need to allocate budget towards packing materials, courier costs and conservation.
- Risk assessments – risk assessment should be carried out regularly to provide detailed information on risks to the collection and suggestions for mitigating risk. This is a crucial source of information for planning improvement as you will want to tackle areas of high risk before lower risks.
- Budget and sources of external funding - how much money do you have to help deliver the plan over the planning period? Can you apply for external funding?
- Staff time – how much staff time can be allocated and do you have the necessary expertise?

The objectives and tasks in your table should be SMART:

**S** - Specific

**M** - Measurable

**A** - Achievable

**R** - Realistic

**T** - Time specific

### *Example of an objective*

#### **Objective 2B – Commission and install an environmental monitoring system for the Back Lane Store.**

This will involve the collections manager working with the conservation team to identify the best solution within a budget of £15,000. The work should be completed in time for the start of the Old Stables renovation project to allow for monitoring and control of the environment during the temporary re-location of archaeological collections to the Back Lane Store.

### **Remember to keep communicating your plans**

Include as many people as possible in the discussions about priorities to make sure you consider all angles and ensure that staff and volunteers understand the reasons for the final prioritised decisions.





# Step 5

## Set achievable targets for improvement and reducing risk

Once you have a prioritised list of objectives you need to work out the detail and forecast how you are going to achieve your list within the constraints of your resources. A straightforward way to do this is to set them out in a table format and break each objective down into tasks. Each task can then be allocated to an appropriate staff member with a completion date, milestones and an identified budget as shown in the extract below.

Objective	Task	Staff	When by	Resources
2B - commission environmental monitoring system	Seek quotes from three suppliers	Collections manager	Mid feb	No cost
2B	Liaise with Estates on electrical work required for installation.	Collections manager	Mid feb	£2,000

This is the detailed planning stage when you examine whether the objectives are achievable within the time and resources available. At the end of this process you will be ready to write up your plan into a coherent document.

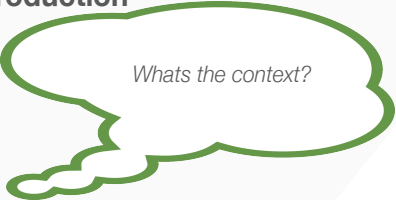
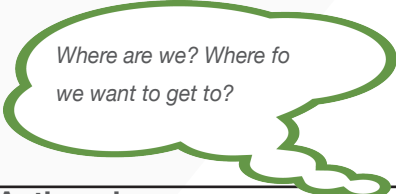
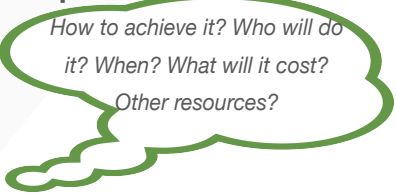
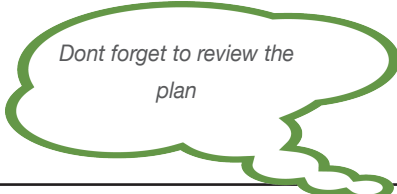


# Step 6

## Write your plan and share it

Once all of these steps are completed you can write your plan.



<b>Introduction</b>  <p><i>Whats the context?</i></p>	<p>This will describe the context for the plan, its relationship to the mission statement, existing policies and strategic plans and give an overview of your current situation, strengths and weaknesses. If you are reviewing a previous plan, you should provide an overview of what you achieved, an analysis of why you did not achieve any unmet targets and a statement of what you plan to do about it, if anything.</p>
<b>Detailed review &amp; objectives</b>  <p><i>Where are we? Where fo we want to get to?</i></p>	<p>This might contain a detailed breakdown of your current situation under each collections care heading with a statement of what you aim to achieve: your objectives. It is helpful to use numbering so each objective can be easily identified and referred to in the action plan and when reviewing and reporting on the plan later on.</p>
<b>Action plan</b>  <p><i>How to achieve it? Who will do it? When? What will it cost? Other resources?</i></p>	<p>A detailed action plan is best presented as a table. Each objective will be listed with reference to the relevant Strategic Objectives from the Museums overall Forward Plan. The Objective should then be broken down into tasks with staff, resources and budget identified and milestones and deadlines to allow for effective monitoring</p>
<b>Review date</b>  <p><i>Dont forget to review the plan</i></p>	<p>All plans should have a named person responsible for the plan and a date for review.</p>



**Don't forget to:** review your progress regularly - update your plan in the light of your review - build in time to repeat the process in time for the next review date to ensure ongoing progress and improvement.

# Where can I find out more?

## More about managing risk as part of the planning process

***Assess and manage risk in collections care: a Collections Care How To Guide***, (2012), Norfolk Museums and Archaeology Service.

[http://www.sharemuseumseast.org.uk/shares/resource\\_125.pdf](http://www.sharemuseumseast.org.uk/shares/resource_125.pdf)

***Risk Management and Disaster Planning for Museums***, (undated), S-Tech insurance Services Ltd.  
<http://www.collectionslink.org.uk/discover/site-information/890-s-tech-guide-to-risk-management-for-museums>

## More about planning for collections care

***Collections Management: a practical guide***, (2009), Collections Trust.  
<http://www.collectionslink.org.uk/shop>

***Publicly Available Specification 197:2009 Code of practice for cultural heritage collections management***, (2009), BSi (PAS197)

***Accreditation Scheme, overview of the scheme***  
<http://www.artscouncil.org.uk/what-we-do/supporting-museums/accreditation-scheme/>

***Accreditation Resource list, (2011), Arts Council England***  
<http://www.collectionslink.org.uk/programmes/museum-accreditation/1262-accreditation-resource-list>

***Accreditation Guidance Sheet 3: Collections Management Plans and Procedures***, (2011), Collections Trust  
[http://www.collectionslink.org.uk/media/com\\_form2content/documents/c1/a562/f6/FactSheet3\\_Collections\\_Management\\_Planning\\_and\\_Procedures.pdf](http://www.collectionslink.org.uk/media/com_form2content/documents/c1/a562/f6/FactSheet3_Collections_Management_Planning_and_Procedures.pdf)

***Benchmarks in Collections Care, (2011), Collections Trust***  
<http://www.collectionslink.org.uk/programmes/benchmarks-for-collections-care/691-benchmarks-in-collection-care-for-museums-archives-and-libraries>

