

WELCOME!

Museum Skills Lab Collections Planning

While we are waiting for everyone to join, please reply to the following question in chat:

What collections policies, plans, or procedures does your museum currently have?



Museum Skills Lab

Collections Planning

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Introductions

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OVERVIEW

- Collections stewardship
- What is a Collections Plan?
- Why plan?
- How to write the plan
- Activity
- The planning process
- Takeaways
- Continue the conversation

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Collections stewardship

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Thinking big picture

Museums are expected to:

- plan strategically and act ethically with respect to collections stewardship
- legally, ethically, and responsibly acquire, manage and dispose of collection items as well as know what collections are in its custody, where they came from, why it has them, and their current condition and location
- provide regular and reasonable access to, and use of, the collections in its custody

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Thinking big picture (more simply put)

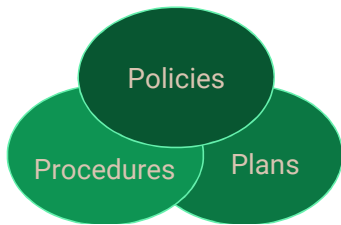
- Know what stuff you have.
- Know what stuff you need.
- Know where it is.
- Take good care of it.
- Make sure someone gets some good out of it . . .
- Especially people you care about . . .
- And your neighbors.



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Policies, plans, procedures



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Policies, plans, procedures

POLICIES

- Standards
- Framework for decision-making
- Define responsibility
- Delegate decision-making
- Not time-limited
- Approved by governing authority

PLANS

- Vision
- Compare existing collection to vision
- Map out specific goals and action steps
- Time-limited
- Approved by governing authority

PROCEDURES

- Instructions
- Operational guides, manuals, handbooks
- Developed at staff level

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Policies, plans, and procedures should be consistent with one another

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What is a Collections Plan?

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Defined by AAM National Standards

"Collections planning is the process of making conscious, proactive choices about what belongs in the collections in light of the museum's mission, purposes, and audiences.

It actively shapes the collections to support the stories the museum intends to tell or the questions its users ask."



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Key characteristics of a Collections Plan

- It gives background information
- Describes the current state of the collection
- Defines the future direction of where a museum wants its collection to go
- These elements translate into a statement of:
 - specific goals
 - action steps
 - timeline

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Time orientated

- Time orientated aspect sets it apart
- Definitive time frame to achieve goals
- Outlines the who, how, and the when
- Entire document is meant to have a certain lifespan



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Collections planning in museums is still rare

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Why plan?

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Reasons for creating a Collections Plan

- Mission alignment
- Resource maximization
- Collection diversification
- Best practices



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POLL

Which to do first: policies, plans, or procedures?

Share your thoughts in chat.



How to write a Collections Plan

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AAM Guide to Collections Planning

The AAM Guide to Collections Planning (Gardner and Merritt 2004)

- Some areas may NOT be applicable
- Other areas may need to be included
- All policies, plans, and procedures have to be customized

Why is this outline any good?

- Information gathered at a 2002 colloquium
- Involved 80 people representing 36 institutions from across the country

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AAM Guide to Collections Planning outline

- Executive summary
- Preamble or introduction
- Setting the stage (background information)
- Intellectual framework (vision for the collection)
- Analysis of the existing collection
- Shaping the ideal collection
- Implementation strategies
- Evaluation
- Review



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Executive summary

- Who, how, where and when of the plan in brief
- Lays out the structure of the document and its contents
- The summary may be the only aspect of the plan people read
- Write this section last



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Preamble

Purpose of the Collections Plan

- Grow collection or fill gaps
- Reduce size of collection
- Align collection with mission
- Create a case for additional funding for acquisitions
- Better reflect your community and diverse voices

Audience for the document

Authority: How the plan was developed, who participated, who wrote it

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Setting the stage

The Collections Plan is only one of a number of documents that guide the museum's decision-making

The Collections Plan needs to acknowledge or reference other deciding documents

- Museum mission or statement of purpose
- Museum vision
- Overview of major points of current strategic plan
- Other relevant plans

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Intellectual framework

- States the rationale for, or theory of, the collections and collecting
- Describes what a museum's collection should ideally look like and how it should function to serve the community
- Helps the museum make better decisions
- Moves the institution from ad hoc, idiosyncratic collecting to strategic, integrated collecting
- From building a collection to shaping a collection

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Intellectual framework: author?

The success of a Collection Plan rests on getting broad support and incorporating diverse viewpoints.

Full range of stakeholders:

- Museum governing authority
- Museum staff
- Museum members
- Audiences
- Communities
- Outside scholars and specialists



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Address collections biases!

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Intellectual framework: tough questions

- Collecting goals and interpretive goals
- New directions and legacy collections
- Current needs and future needs
- Passive collecting and planned collecting
- Institutional goals and collective responsibilities



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Analysis of existing collection

Know your starting point!

- Description/Scope of Collections (*overlap with CMP*)
- History
- Strengths and weaknesses: gap analysis
- Connections to other institutions and their collections

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No museum can collect everything!

Think about which organizations already collect and interpret materials relevant to your mission

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Shaping the ideal collection

Acquisitions and Deaccessions

- Priorities
- Strategies
 - Acquisitions: passive or active?
 - Deaccessions: earmark funds to diversify collection
- Criteria (*overlap with CMP*)



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Implementation strategy

- Action steps
- Assignment of responsibility
- Identification of existing and needed resources
- Timeline of implementation



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Evaluation

- Is the museum achieving what it intended?
- Ensure goals are being accomplished in the prescribed time frame
- Celebrate success



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Reviewing the plan

The plan should be in a constant cycle of review and revision.

Evaluation and Review

- When will it take place?
- Who will do it?



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ACTIVITY

Let's analyze some existing Collections Plans together!

- Break into groups
- Each group will scan through a plan and discuss:
 - What do you like?
 - Does this plan leave out areas of the outline we discussed?
 - Does it include other information?
- Come back together and share your thoughts



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The planning process

The process of collections planning is more valuable than the physical document!

Planning process needs to be an institutional priority

- Support from the top
- Appropriate resources committed
- Integrated into the museum staff's work

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Takeaways

- Collections must be strategically planned
- Policies, plans, and procedures should be consistent with one another
- Collections planning in museums is still rare
- Address collections biases
- No museum can collect everything! Think about which organizations already collect and interpret materials relevant to your mission
- All about process

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Continue the Conversation

- 1 - Handouts + Resource Sheet
- UA&M staff are here for you! Please reach out.
 - jenniferortiz@utah.gov
 - emilyjohnson@utah.gov
- Upcoming Museum Skills Lab: Collections Management Policy
 - June 23, 12PM
- If you can, stick around for Q&A

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- 1 @jenniferortiz@utah.gov & @emilyjohnson@utah.gov to check
AASLH
Assigned to Jennifer Ortiz
Emily Johnson, 5/5/2021