Handling Procedures Manual: Creating Training for Staff and Object Handling Culture

Webinar 2

Marie Desrochers
Utah Division of Arts and Museums

February 16, 2023
11 am- 1 pm

NATIONAL ENDOWMENT FOR THE HUMANITIES

UTAHHUMANITIES
Ideas in Action

GOALS

Gain a better understanding of Key Themes...

Key Themes

1. Understand basics of object handling
2. Understand the tension of object handling and collections access
3. Understand creating training and policies for “How to handle” vulnerable objects in your collection

AGENDA

- Program Overview/Housekeeping
- Introductions
- Basics of Object Handling and Access
- What is a Handling Procedures Manual?
- Activity
- Discussion

PROGRAM OVERVIEW: Year at a Glance

The Utah Collections Preservation Program supports **comprehensive preservation training** for collections stewards through quarterly programming.

Each quarter includes 3 free webinars, a two-part in-person workshop, preservation assessments, and the focused training of Collections Preservation Team members.

Access and Artifact Handling	SPRING 2023	January 5, 2023	Workshop 1a, Edge of the Cedars, Blanding
		January 19, 2023	Webinar 1, Digitization and Collections Care
		February 2, 2023	Workshop 1b, Grand County Library, Moab
		February 16, 2023	Webinar 2, Handling Procedures Manual
		March 16, 2023	Webinar 3, Collections Move
Preservation in Storage and Display	SUMMER 2023	April 6, 2023	Workshop 1a, John Wesley Powell Museum, Green River
		April 20, 2023	Webinar 1, Thinking in Systems: Preservation Site Assessments
		May 4, 2023	Workshop 1b, Emery County Archives, Castle Dale
		May 18, 2023	Webinar 2, Preservation through Partnership: Care of Culturally Sensitive Objects
		June 15, 2023	Webinar 3, Preservation of Outdated Media
Environment and Building Systems	FALL 2023	July 6, 2023	Workshop 1a, USU East Prehistoric Museum, Price
		July 20, 2023	Webinar 1, Preservation and Collections Hazards
		August 3, 2023	Workshop 1b, Helper Auditorium, Helper
		August 17, 2023	Webinar 2, Integrated Pest Management
		September 21, 2023	Webinar 3, Collections Management Systems
Risk Management, Emergency Preparedness & Disaster Response	WINTER 2023	October 5, 2023	Workshop 1a, Canyon Country Discovery Center, Monticello
		October 19, 2023	Webinar 1, Emergency Planning: Pocket Response Plan
		November 16, 2023	Webinar 2, Seismic Storage
		November 2, 2023	Workshop 1b, USU Eastern Library Special Collections, Price
		December 21, 2023	Webinar 3, Security for Collections and Access

REGISTER HERE

Scan with your phone or visit www.artsandmuseums.utah.gov/utah-collections-preservation

Workshops are in-person, full-day events, and occur in two parts.

Registration is $10 to cover materials. Please note when registering that you will be expected to attend both Part A and Part B - registration fees covers **both parts** of the workshop.

Scholarships available! to offset costs associated with travel to and from each workshop.

UTAHHUMANITIES Ideas in Action

NATIONAL ENDOWMENT FOR THE HUMANITIES

Utah Division of Arts & Museums

INTRODUCTIONS

Please share the following:

Your name, where you work, and your role

Artifact Handling Training 101

Zoom Poll

What kind of collections does your institution steward?
Does your institution have object handling training?
Do you have a written handling policy?
Who takes collections handling training?

“SIMPLY PUT”…

1. Know what stuff you have
2. Know what stuff you need
3. Know where it is
4. Take good care of it
5. Make sure someone gets some good out of it
6. Especially people you care about
7. And your neighbors

Policies & Procedures

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

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

Western Australia Museum

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

Western Australia Museum

COLLECTIONS MANAGEMENT POLICY

"A collections management policy addresses various aspects of the museum's **collections stewardship responsibilities.**

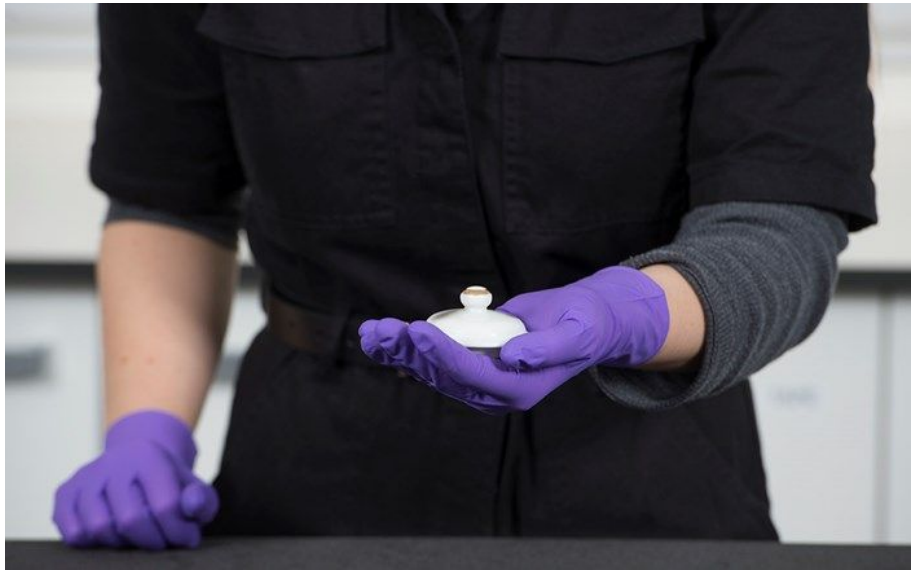
This policy defines the scope of a museum's collection and how the museum **cares for** its collections and makes them **available** to the public.

A collections management policy also explains the **roles** of the parties responsible for managing and caring for the museum's collections."

ACCESS & HANDLING

Objects are at the highest risk of damage when they are being handled or moved.

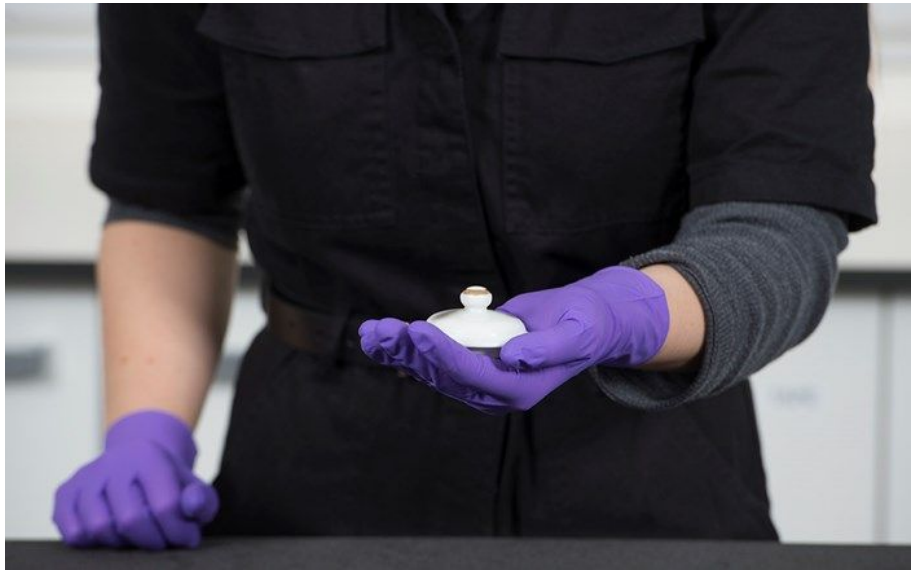
Wherever possible, limit the extent and frequency of handling and moving objects.



National Museums of Scotland

ACCESS & HANDLING

If handling introduces risk, then how do we decide who gets to handle collection objects and how?



National Museums of Scotland

BASICS OF OBJECT HANDLING

Any time we handle a collection object, we are introducing RISK

Ten Agents of Deterioration

Graphic by Centroid PM

HANDLING IS INTRODUCING RISK

- Minimize object handling whenever possible
- Access and Policies: consider who has handling access
- Handling creates opportunities for the impact of physical forces and dissociation
- Create storage that facilitates safe handling

Risk management is a system to forecast risks in advance and take proactive steps to deal with identified risks.

Ten Agents of Deterioration

Graphic by Centroid PM

Preventive Conservation is a system to forecast risks in advance and take proactive steps to deal with identified risks.

Ten Agents of Deterioration

Graphic by Centroid PM

Because we are managing risks, we need to be intentional about object handling, and that means planning before acting.

Ten Agents of Deterioration

Graphic by Centroid PM

OBJECT “TYPES”- Knowing what you have

CERAMIC

PAINTINGS

TEXTILES

PAPER

STONE

WOOD

LEATHER

PLASTIC

BONE

GLASS

PAPER

METAL

METAL

PLANT FIBER

CERAMIC

WOOD

TEXTILE

STONE

PHOTOGRAPH

CERAMIC

CLOSE LOOKING- Knowing what is in front of you.

- What is your object made out of?
- How has it deteriorated over time?
- What are its sensitivities?
- Where is it most stable?

Winterthur Museum, Garden, & Library

ONLY HANDLE IF YOU NEED TO

- Do you really need to handle that object?
- What kind of storage best facilitates access but minimizes handling?

Museum Storage that minimizes handling

RULES AND TOOLS- Plan Your Move and Handling

- Where are you going? Can you get there?
- What tools can you use to more safely move objects?
- Use carts, folders, and boxes to carry objects.
- Avoid stairs and take elevators when possible
- Use two hands and/or two people.

Canadian Conservation Institute

RULES AND TOOLS- Plan Your Move and Handling

Gaylord Archival

TALAS

Object cart - pneumatic wheels and padding reduce vibration during movement,

Field Museum

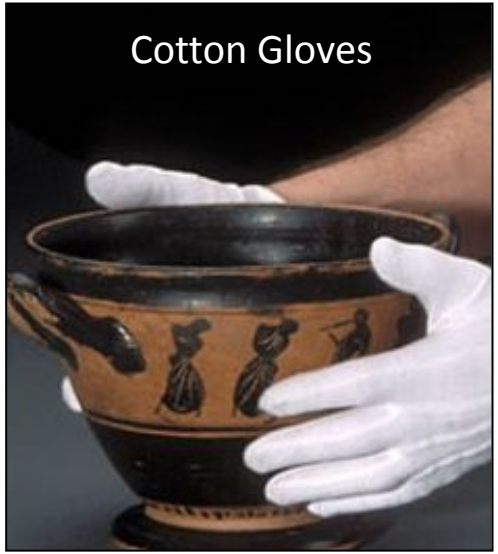
RULES AND TOOLS- GLOVES

GLOVES (NITRILE GLOVES)

- Photographs
- Gilded Frames
- Textiles (can be cotton)
- When in doubt, wear nitrile gloves!!

NO GLOVES (CLEAN HANDS)

- Paper



Nitrile gloves (left) are recommended over cotton gloves (above). Cotton gloves absorb oils from hands, decrease dexterity and can snag or tear paper.

Nitrile gloves are essential to collections care!!!

RULES AND TOOLS- GLOVES

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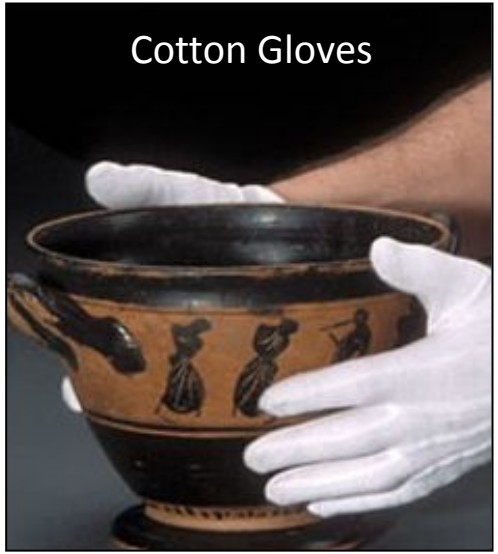

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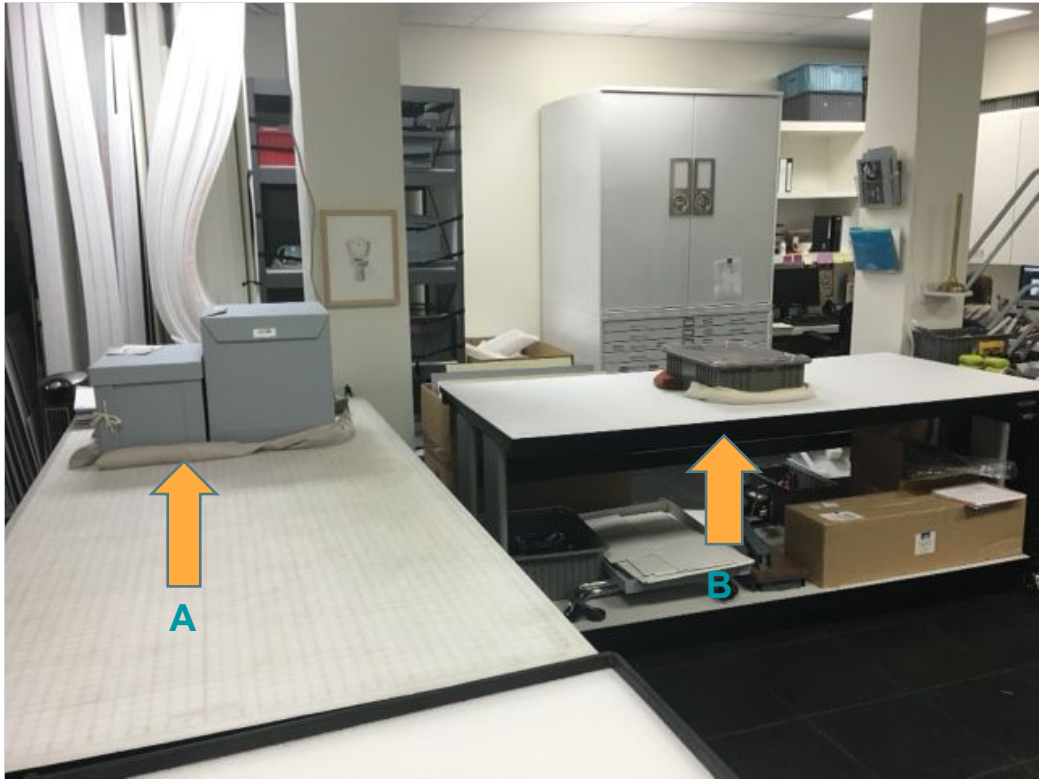
Ashmolean Museum in Oxford “touchometer” from UCL

WORKSPACE

- PLAN your move from point A to point B
- Landing space for objects
- Secure
- Clean and organized
- Padding/containers for objects
- Spacious
- Object snakes/weights/supports



ONE ARTIFACT AT A TIME

- Use common sense and great care!
- Avoid stairs and take elevators when possible
- Use two hands and/or two people.
- Plan ahead to get help if you need it

HAND PLACEMENT

National Museum of Scotland- Frame Handling

HAND PLACEMENT

National Museum of Scotland, Textiles

HAND PLACEMENT

© Government of Canada, Canadian Conservation Institute.

HAND PLACEMENT

National Museum of Scotland, Object Handling

HAND PLACEMENT

HAND PLACEMENT

National Museum of Scotland, Object Handling

UNDERSTAND YOUR OBJECT

Even brief visual condition assessments inform decisions about handling and moving objects. Understanding your object's sensitivities and composition is necessary. Take your time, and plan.

CCI 125773-0015
Figure 35. This treadle sewing machine table was lifted appropriately at the cast iron base with gloved hands.

© Government of Canada, Canadian Conservation Institute.

BREAK (5 Minutes)

WHY MAKE AND USE A HANDLING MANUAL

1. Policies set standards for your institution, and help you enforce them
2. Training creates a positive path to minimize improper handling of objects, promoting preservation
3. It creates a culture of transparency and shared responsibility for direct collections care
4. Encourages thoughtful consideration of object use to promote preservation

A HANDLING MANUAL SHOULD ADDRESS

1. Who is allowed to handle collections in your museum?
   a. Is supervision required?
   b. Is training required?
2. How should your collections be handled?
   a. Glove vs. clean hands policies
   b. Workspace requirements
3. Object and Human Safety
4. Re-training

EXAMPLES OF EXISTING GUIDES

Winterthur Museum, Care in Handling, Chapter 1, Objects

8,504 views • Oct 30, 2013 30 DISLIKE SHARE SAVE ...

[Winterthur Museum, Garden & Library]

Winterthur Museum, Care in Handling, Chapter 2, Textiles
Kathan L
4.6K views • 8 years ago

Winterthur Museum, Care in Handling General Session,...
Kathan L
7.6K views • 8 years ago

Winterthur Museum, Care in Handling, Chapter 5, Paintings
Kathan L
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Relaxing Jazz Music - Background Chill Out Music -...

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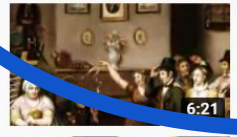
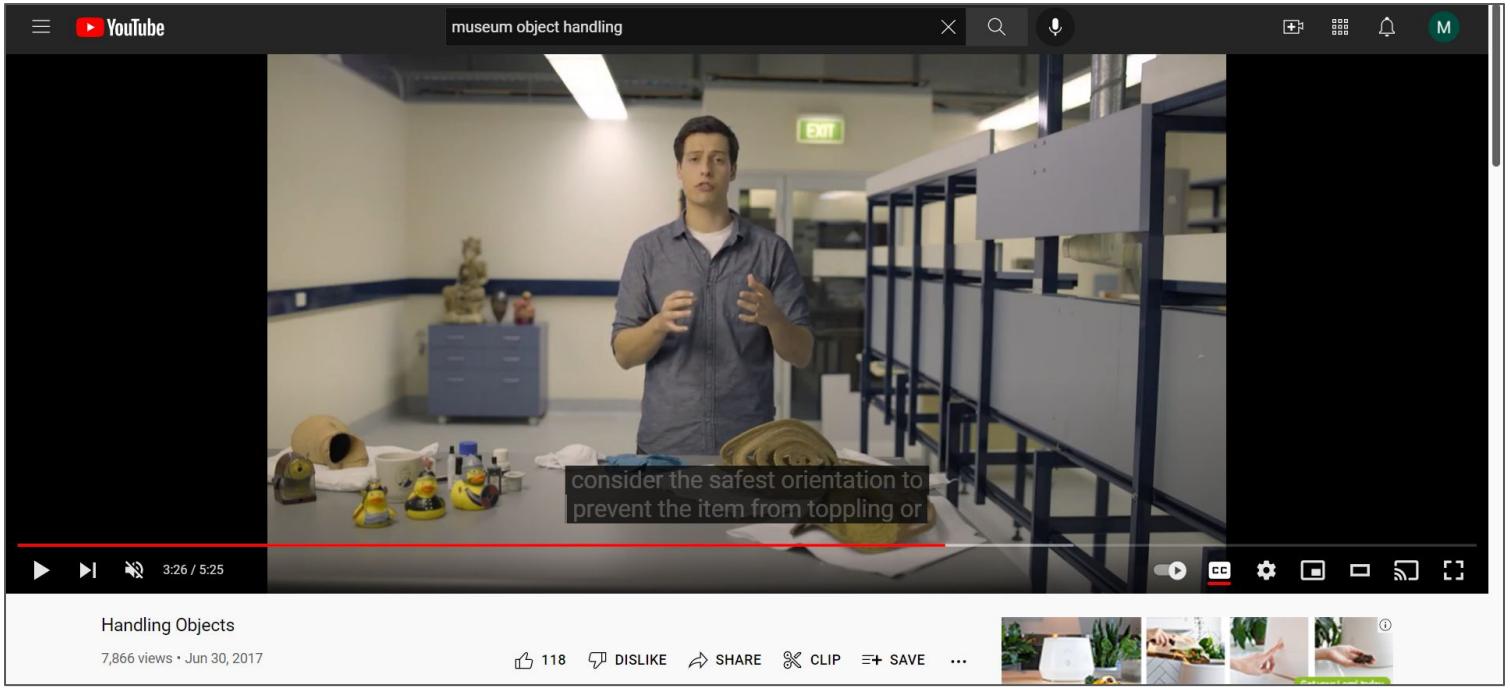


Winterthur Museum, Care in Handling, Chapter 5, Paintings
Kathan L
4K views • 8 years ago

Relaxing Jazz Music - Background Chill Out Music -...

EXAMPLES OF EXISTING GUIDES



Western Australia Museum

Museums & Galleries of NSW

ABOUT PLACES PROGRAMS RESOURCES EXHIBITIONS ABORIGINAL GRANTS EVENTS JOBS ARTICLES

Handling Museum Objects

- Aboriginal
- Access
- Collection care
- Collection management
- Disaster
- Digital
- Education
- Exhibition
- Grants and funding
- New facilities
- Organisation management
- Research

Inspecting and cataloguing objects. Photo by Vanessa Low / M&G NSW

Western Australia Museum

EXAMPLES OF EXISTING GUIDES

Museum of London

e-learning / Handling Museum Objects /

SECTION 1

Home

Print

Introduction (5 of 8)

What equipment will I need?

When handling museum objects, you will need a range of equipment to protect yourself and the object.

Personal Protective Equipment (PPE)

You should always wear the appropriate Personal Protective Equipment (PPE). For almost all objects, this will include:

- Gloves (as discussed previously)
- A lab coat or protective apron

For objects that are particularly dusty or dirty – or stored in a dusty or dirty environment – you may also want to wear a dust mask, which will protect you from inhaling dust and mould. Dust masks come in a range of styles, from basic mouth covers to those with filters. For most museum objects, a basic dust mask will be all the protection you will need.

Back

NEXT

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EXAMPLES OF EXISTING GUIDES

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MENU

Canada.ca > Culture, history and sport > History and heritage > Museology and conservation > Preservation and conservation > Preventive conservation and risks > Preventive conservation > Preventive conservation guidelines for collections

Handling heritage objects

Janet Mason

Handling heritage objects is part of CCI's Preventive conservation guidelines for collections online resource. This section presents key preventive conservation considerations for safe handling practices with regards to heritage collections.

Table of contents

- Handling: key considerations
  - Handling: risks to heritage objects
    - Physical forces
    - Contaminants
  - Handling: risks to handler
- Strategies for safe handling of objects
  - Prior to handling
    - Understand the object
    - Clear the way

Canadian Conservation Institute

COLLECTIONS PRESERVATION

EXAMPLES OF EXISTING GUIDES

UNIVERSITY OF ALASKA MUSEUM OF THE NORTH

Exhibits and Design

Object Handling Procedure

Proper object handling and careful movement of objects is an integral part of preventive conservation. When you move objects you increase the risk of damage and loss because you are both handling them and changing their location. **Moving puts an object at its greatest risk.**

Before you move objects within the museum for dusting, cleaning, or any other purpose, know and follow the procedures in order to help reduce the risk of damage to you and the object. Plan before handling or moving any museum objects. Think through your plan so that you lift and move objects properly. With advanced planning, you can keep movement of objects to a minimum. **The less museum objects are handled, the longer they will survive.**

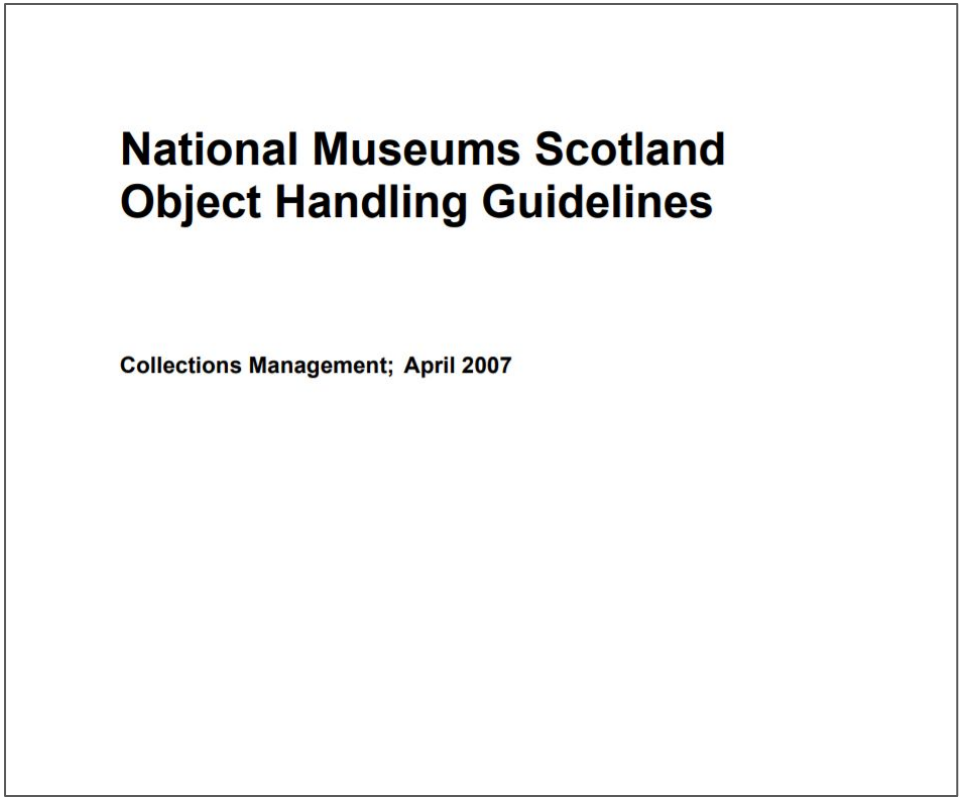
A. Basic Handling Practices
When you handle objects, act safely, conservatively and carefully for you and the object. Follow these basic standards to prevent damage to objects:

1. Handle objects only when necessary.
   - Treat every museum object as if it was irreplaceable and the most valuable piece in the collection.
   - Never hurry.
   - Take no risks.
2. Prepare to move objects safely.
   - Keep hands clean, even when wearing gloves.
   - Wear appropriate gloves to protect objects from contaminants such as dirt, salts, acids, and oils on your hands. Beware of fabric gloves catching on ruff surfaces.
   - Avoid wearing anything that might damage objects by scratching or snagging the surface (for example, rings and other jewelry, watches, belt buckles, nametags, service badges).
3. Create a good environment and use appropriate tools.
   - Allow yourself plenty of space in which to work.

[University of Alaska: Museum of the North]

COLLECTIONS PRESERVATION

EXAMPLES OF EXISTING GUIDES

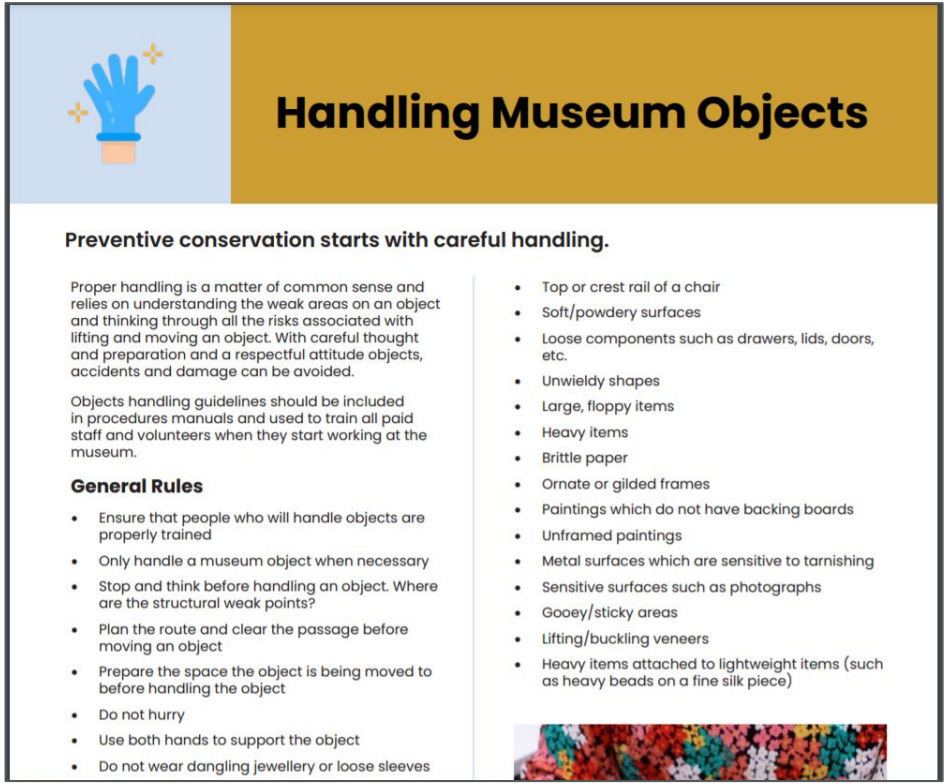


National Museums Scotland Object Handling Guidelines

Collections Management; April 2007

National Museums Scotland

EXAMPLES OF EXISTING GUIDES



Handling Museum Objects

Preventive conservation starts with careful handling.

Proper handling is a matter of common sense and relies on understanding the weak areas on an object and thinking through all the risks associated with lifting and moving an object. With careful thought and preparation and a respectful attitude objects, accidents and damage can be avoided.

Objects handling guidelines should be included in procedures manuals and used to train all paid staff and volunteers when they start working at the museum.

General Rules

- Ensure that people who will handle objects are properly trained
- Only handle a museum object when necessary
- Stop and think before handling an object. Where are the structural weak points?
- Plan the route and clear the passage before moving an object
- Prepare the space the object is being moved to before handling the object
- Do not hurry
- Use both hands to support the object
- Do not wear dangling jewellery or loose sleeves

- Top or crest rail of a chair
- Soft/powdery surfaces
- Loose components such as drawers, lids, doors, etc.
- Unwieldy shapes
- Large, floppy items
- Heavy items
- Brittle paper
- Ornate or gilded frames
- Paintings which do not have backing boards
- Unframed paintings
- Metal surfaces which are sensitive to tarnishing
- Sensitive surfaces such as photographs
- Gooey/sticky areas
- Lifting/buckling veneers
- Heavy items attached to lightweight items (such as heavy beads on a fine silk piece)

[Museums and Galleries of New South Wales]

EXAMPLES OF EXISTING GUIDES

HYRUM CITY MUSEUM

Collections Handling Guide

The Hyrum City Museum has created this object handling guide as a resource to museum staff, interns, and volunteers who do work on the collections in the form of inventorying, condition reporting, accessioning, cataloging, moving, storing, exhibiting, and other handling of objects.

All individuals handling museum objects will go through a basic training to ensure they know how to properly handle objects to minimize risk or damage to the object following museum best practices and standards. Volunteers should be retrained in these techniques at least once a year.

Proper object handling and careful movement of objects is an integral part of preventive conservation. When you move objects, you increase the risk of damage and loss because you are both handling them and changing their location. *Moving puts an object at its greatest risk.*

Plan before handling or moving any museum objects. Think through your plan so that you lift and move objects properly. With advanced planning, you can keep movement of objects to a minimum. *The less museum objects are handled, the longer they will survive.*

Proper handling is a matter of common sense and relies on understanding the weak areas on an object and thinking through all the risks associated with lifting and moving an object.

Hyrum City Museum- Courtesy of Courtney Cochley

A. General Practices
B. Guidelines for Areas of Vulnerability
C. Glove Policy
D. Equipment/Materials
E. Planning a Move or Handling
F. Damage
G. Personal Safety Guidelines
H. Waiver

Handout

Object Handling Guide Template

Utah Collections Preservation Program
2/17/2022

Institution:
Who: **Required training:** **Re-training required every:**
A. General Practices:
B. Guidelines for Areas of Vulnerability:

A. General Practices

- Ensure that people who will handle objects are properly trained
- Only handle a museum object when necessary
- Stop and think before handling an object. Where are the structural weak points?
- Plan the route and clear the passage before moving an object
- Prepare the space the object is being moved to before handling the object
- Do not hurry
- Use both hands to support the object
- Do not wear dangling jewellery or loose sleeves
- Make sure hands are clean and wear fitted gloves

B. Guidelines for Areas of Vulnerability

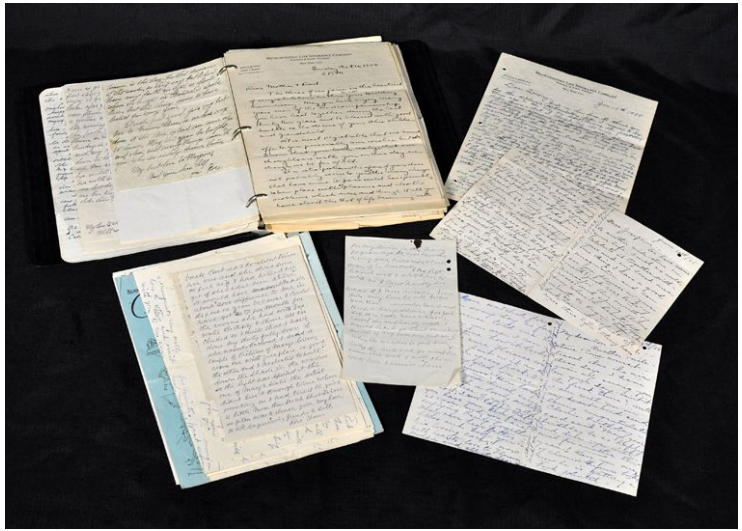
Know your object and its existing condition issues before handling. Understand its sensitivities and areas where breakage is likely to occur

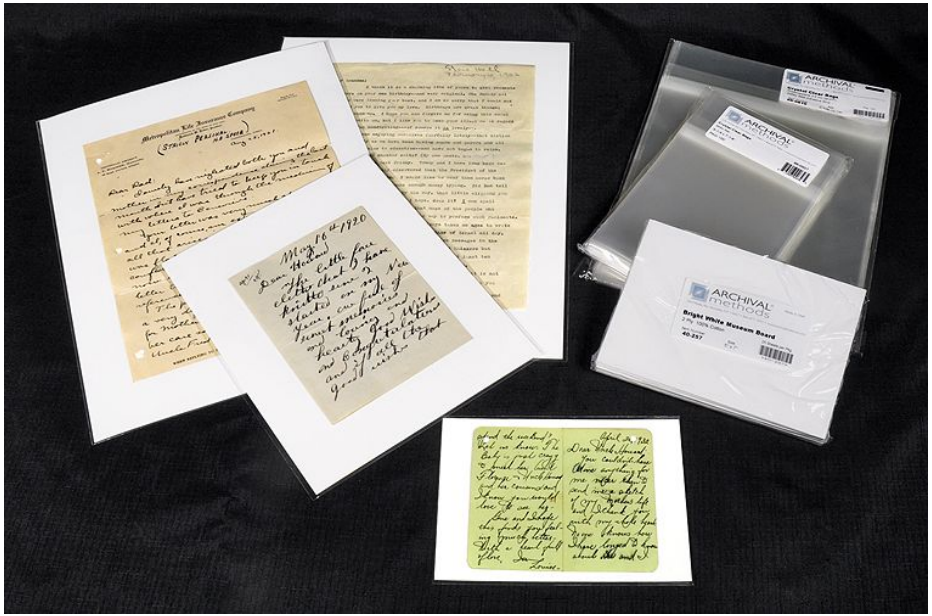
C. Glove Policy- Keep it simple

GLOVES* (NITRILE GLOVES)** ~~NO GLOVES* (CLEAN HANDS)**~~

- Always wear gloves when handling objects

D. Equipment/Materials





Handling boards and mats such as these make handling fragile manuscripts much safer

Archival Methods Blog

E. Planning a Move or Handling

Who do you need to help you? What tools do you need?
Where are you going each step of the way?

Natural History Museum London

F. Damage

Some objects, such as this deteriorated plastic, will become damaged with even the most careful handling

New York Times

G. Personal Safety Guidelines

The Field Museum

Objects themselves commonly have toxic residues such as arsenic or other chemical pesticides

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G. Personal Safety Guidelines

Potential Collections Hazards

- Pesticides
- Firearms and explosives
- Biological disease
- Mold
- Asbestos
- Radioactive materials
- Toxic chemicals or elements

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H. Waiver

H. Waiver:

I, _____, have completed all necessary handling training and agree to adhere to the guidelines listed above. I understand that object handling is a privilege, and my inability to adhere to the guidelines above may cause my handling privileges to be revoked. I will participate in annual object handling retraining on _____.

Signature: _____

Date: _____

Collections Supervisor:_____

Date: _____

H. Waiver

Training completed

Handling Privilege

Retraining schedule

Signature

Supervisor

H. Waiver:

I, _____, have completed all necessary handling training and agree to adhere to the guidelines listed above. I understand that object handling is a privilege, and my inability to adhere to the guidelines above may cause my handling privileges to be revoked. I will participate in annual object handling retraining on _____.

Signature: _____

Date: _____

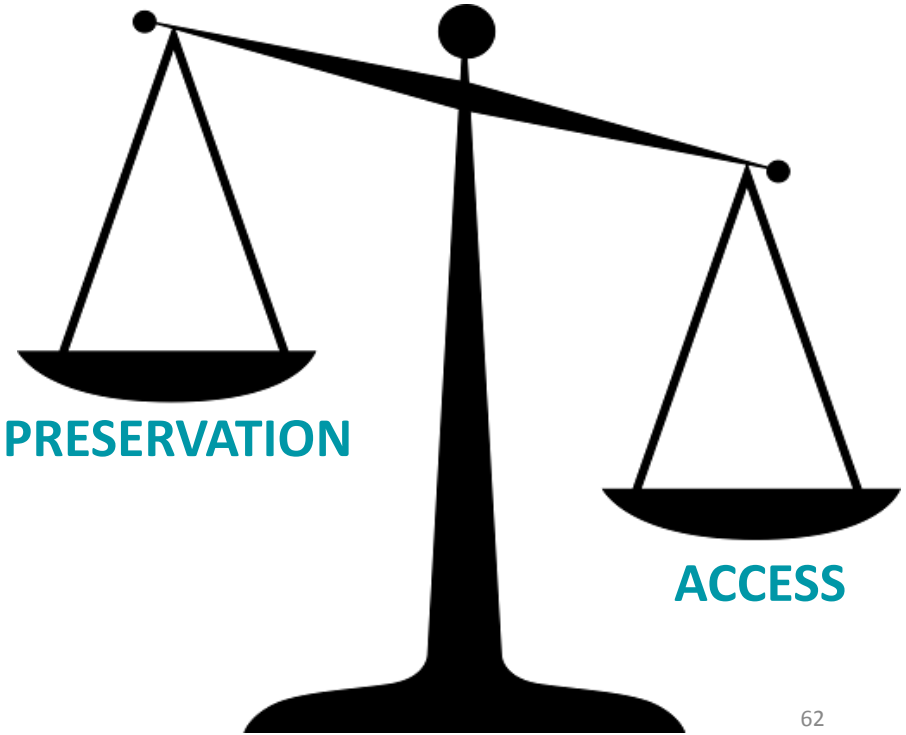
Collections Supervisor:_____

Date: _____

Who is allowed to handle collections in your museum?

- The public
- School groups
- Family and friends
- Tribal representatives
- Education staff
- Donors
- Researchers
- Facilities staff
- Volunteers
- Government representatives
- Janitorial staff
- Curators

Who is allowed to handle collections in your museum?



ACTIVITY

In a breakout room:

How could you implement this template and handling policy at your institution?

Beyond the template what else do you feel needs to be included in a collections handling manual? What is missing?

Summary & Discussion

- Object Handling Training and written policies can be powerful tools for preservation
- A written Handling Manual establishes and helps enforce standards for handling
- Decisions about who gets handling privileges is risk management and requires careful consideration of mission and access at your institution

Thank you!

Marie Desrochers | mdesrochers@utah.gov
https://artsandmuseums.utah.gov/utah-collections-preservation/

This project was made possible in part by the National Endowment for the Humanities.

NATIONAL ENDOWMENT FOR THE HUMANITIES

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Ideas in Action

Utah Division of Arts & Museums