



SOCIETY OF
ANTIQUARIES
OF LONDON

Society of Antiquaries of London

Documentation Policy

for Museum Collections at Burlington House
and Kelmscott Manor

Governing Body: Council (the Society of Antiquaries of London)

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1. Statement of Authority

1.1 Mission statement

In 1717 the Society of Antiquaries of London was established as a constituted Society. A Royal Charter of 1751 established the Society with its formal mission and governance system, and provided a framework from which the Society could meet its aims.

“The encouragement, advancement and furtherance of the study and knowledge of the antiquities and history of this and other countries.”

Royal Charter, Society of Antiquaries, 1751

The Society achieves this by promoting and supporting conservation, research and dissemination of the material remains of the past. The care of collections remains central to the Society’s purpose:

1.2 Strategic goals and intentions

- To engage, enthuse and foster the Fellowship and staff in pursuing the aims of the Society to further our understanding of the past and influence the heritage sector and the general public.
- To conserve and develop the research and educational potential of the buildings, collections and library at Burlington House and Kelmscott Manor and to make these resources more accessible to Fellows and the wider public.

1.3 Governance

1.3.1 The Society’s governing body is a Council, subject to annual election, who are responsible as Trustees under the Charities Act (2009). Council determines and approves policy, and the strategic objectives of the Society. Council also delegates responsibility for advice and assistance to a number of Committees, comprising officers and Fellows who have specialist knowledge, understanding and responsibility relevant to each Committee’s remit.

1.3.2 The development of the Society’s collections falls under the responsibility of the Library & Collections Committee, who, along with furthering the Society’s strategic goals and intentions, are charged with:

- Encouraging and supporting the maintenance and development of the museum collections at Burlington House and Kelmscott Manor.
- Ensuring the Library and Museum Collections are adequately conserved, preserved and securely housed.
- Promoting awareness and use of the collections and improving access through temporary loans and exhibitions.
- Improving and widening access to the Library and museum resources and services and making them better known.

- Discussing strategic requirements and priorities which will inform the budget setting for the library and collections and fundraising priorities.

1.3.3 An Advisory Committee for Kelmscott Manor, is additionally responsible for:

- Advising on collection management and the conservation of both the fabric of the buildings and the contents.
- Liaising with the Library and Collections Committee about loans from the collections at Kelmscott.

1.3.4 Policy development and implementation is delegated to the General Secretary and the Head of Libraries & Collections. A Collections Manager is responsible for the day-to-day management and care of the Museum collections at Burlington House. A Property Manager is responsible for the day-to-day management and care of the museum collections at Kelmscott Manor.

2. Documentation aims and accountability

The Society of Antiquaries of London's approach to documentation management aims to:

1. Establish what is in the Society's collections.
2. Clearly establish the Society's legal rights and responsibilities towards its collections.
3. Maintain up-to-date location control, with current (and historic locations where possible) for every object in the collection recorded.
4. Ensure all objects have an accession number that uniquely identifies the object and corresponds to entry documentation (where collecting occurred at a time when formal Collections Trust entry documentation had been introduced to the Society's collections management systems), database records and object history files.
5. Strengthen the security of the museum collections.
6. Ensure objects can be linked to their associated information, and that objects and their associated information can be easily and efficiently retrieved.
7. Improve and extend accessibility to the collections and to collections information, both physically and intellectually.
8. Create a sound foundation in order to explore future digital and remote access initiatives.
9. Improve transparency and accountability for collections.
10. Facilitate and contribute towards other services relating to the museum's collections, such as the Society's loans, exhibition and publications programs.
11. Ensure documentation procedures comply with at least the minimum professional standards, in compliance with SPECTRUM (see section 3).

12. Aim for all the museum collections to feature on one database, with an intention to make this become publicly accessible.

The Society accepts that the nature of its collecting (with acquisition of material beginning in the early 18th century) has created a diverse museum collection with variable levels and quality of associated documentation. The Society is committed to ensuring that all new acquisitions comply with the key documentation management aims outlined in this policy, and that a documentation plan will aim to achieve these aims for objects in the museum collection acquired prior to the implementation of this policy.

3. Ethics, legislation and standards

Collections information will be recorded in compliance with legal requirements, including the Data Protection Act (1998) and the Freedom of Information Act (2000).

Collections information will be acquired, managed, maintained and used in line with the standards outlined in the Museum Association's *Code of Ethics for Museums* (2007), the SPECTRUM standard (2007, 2011) and the (PAS 197) *Code of practice for cultural collections management* (2009).

The Documentation Plan should be read in association with the Society's *Collections Development Policy, Collections Care and Conservation Policy* and the Society's *Future Plan*. To comply with Accreditation requirements, this Policy will be associated with a Documentation Plan, which will be regularly reviewed and will reflect the Society's documentation management aims, as well as its strategic aims and intentions and its available resources.

With the exception of accessioning and labelling and marking, the Society will apply this policy to every object that enters the museum collection on loan.

3.1 Procedural standards (minimum)

The Society is committed to following the SPECTRUM standard in the management of its museum collections. Each procedure outlined below should be read along with the Society's *Documentation Procedural Manual*, and alongside relevant Collections Trust standard forms. Appointed staff responsible for carrying out each procedure and for maintaining collections documentation standards are specified in the *Documentation Procedural Manual*.

3.1.1 Object Entry

Objects entering the Society will be accepted for the following purposes:

- Consideration for acquisition into the collections.
- Loans for display or exhibition.
- Loans for identification or research.

No objects should enter the Society's collections without the prior authorisation of the Library & Collections Committee and Council.

Every object entering the museum collection, whether deposited with the Society for its museum collections, or representing an object which would come under the remit of staff managing the museum collection, or an object collected by an individual acting on behalf of the Society's museum collection, will be recorded on an Entry Form, which will be signed by the depositor and by an employee of the Society with collections responsibilities (either the Head of Library & Collections, the Collections Manager, the Property Manager at Kelmscott Manor, or the Visitor Experience Manager at Kelmscott Manor). Copies of the forms will be allocated, filed and archived in line with the standards specified in the *Documentation Procedural Manual*.

The object will be returned if:

- The object is declined as an acquisition into the collection.
- The loan period for display/exhibition, identification or research has ended.

White original copies of Object Entry Forms will be permanently archived in a storage area that is locked/access restricted without authorisation. Pink copies of the Object Entry Form will be given to the donor or depositor. Blue copies of Object Entry Forms will be retained with the object until the accessioning process is completed, before then being archived in the relevant Object History File.

All objects entering the collection will be accessioned by the application of a unique identification number, preceded by the suffix/collections identity code LDSAL (for objects held at Burlington House) or KM (for objects held at Kelmscott Manor). Each object (or in some cases groups of objects) will have a unique database record created, and all physical records relating to the object's history and acquisition will be held in an Object History File.

3.1.2 Acquisition and Accessioning

- Acquisitions will only be made in accordance with the Society's *Collections Development Policy* and with the prior authorisation of the Library & Collections Committee and Council.
- Acquisitions will only be made after appropriate due diligence provenance checks have been carried out.

- All objects due to be accessioned into the collection must have had legal title clearly and unequivocally signed over to the Society through completion of the relevant 'ADDITIONAL AGREEMENT' section of the Object Entry Form.
- In the case of purchases, the vendor must provide a traceable receipt as proof of legal title.
- Acquisition of human remains will be subject to additional considerations laid out in the Society's *Human Remains Policy*.
- Acquisitions will not be accepted if unreasonable conservation costs due to condition at the point of object entry would be incurred by the Society.
- The Society will not accept donations of objects into the museum collections that have conditions (other than statutory conditions) attached.
- Every accessioned item will be recorded in an appropriate accession register. These are in the form of a hard-copy Collections Trust accession register at Kelmscott Manor, and the Collections Management System (currently the Mobydoc Micromusee database) at Burlington House. The accession register at Burlington House is formed from Mobydoc Micromusee database record print-outs bound into an appropriate secure hard-copy form.
- Every newly accessioned item will have a corresponding record added to the Collections Management System (currently the Mobydoc Micromusee database at Burlington House and an Access database at Kelmscott Manor). The Documentation Plan will identify areas of the collection yet to be added to the databases or which have skeletal records only, and will apply a timescale to creation, completion or enhancement of database records.
- The Society will store object entry, condition, contextual and historical information relating to object(s) in the collection in an Object History File. Object History Files will be identified by accession number, and will be cross referenced with the object and information stored on the database.
- Object History Files are stored in an area that is locked/access restricted without authorisation.
- The Society will ensure its inventory is kept up-to-date in order to reconcile historic acquisition records and object information with objects as part of retrospective documentation management.

3.1.3 Cataloguing

The Society takes a common-sense approach towards documentation. Ideally, for the majority of our collections, the aim is to document to individual item level. However, for some collections of material it is neither feasible, practical or possible to document to this level of detail and so group documentation may be used to ensure collections at least possess basic inventory level records. Examples include archaeological archives, or large collections of small but similar objects from the same donor.

- Catalogue records will be created on the database. Records for new acquisitions will be created during the accessioning process. The aim will always be to get objects accessioned and catalogued as soon as possible, and not more than 6 months after acquisition.

The Society is committed to ensuring all objects possess a basic catalogue record, containing:

- Accession number (also acting as a record number).
- Object name.
- Number of objects or parts to the object.
- Brief description.
- Provenance.
- Acquisition method, date and source, if known.
- Permanent location.
- A reference to available images.
- Name and date of recorder.

If appropriate or possible, the following additional information will also be recorded:

- Object Entry Form number (or reference to Society *Minutes* if appropriate and if the object represents a historic acquisition).
- Classification information.
- Further descriptive information (weight, dimensions, inscriptions, material etc.)
- Field collection information, if appropriate.
- Production information (i.e. maker, manufacturer, technique etc.)
- Other historic information (i.e. previous associations etc.)
- References to publications or bibliographic information.
- Collections management information (e.g. condition checks, conservation, exhibition, reproduction right, loans etc.)

The collections management systems used as collections catalogues (Mobydoc Micromusee at Burlington House and an Access database at Kelmscott Manor) are backed-up on a nightly basis, with a monthly back-up of all systems archived for 6 months.

3.1.4 Loans-In

Loans-in are only made with the prior authorisation of the Library & Collections Committee and Council, and in accordance with the Society's strategic aims and intentions.

Loans-in may be accepted for the following purposes:

- Display or exhibition.
- Identification or research.
- Photography.

Loans-in will be recorded and formalised on an Object Entry Form **and** by a signed loan agreement.

Loan documentation will be held in the 'Current and Forthcoming Loans In' folder.

Loans-in will be fully recorded, using a regularly maintained loans-in inventory in Excel and a corresponding filing system for hard copy documentation, and will be subject to security and condition checks. At the termination or completion of the loan period, information relating to the loan will be retained and archived for five years after the end of the loan. After this period loans paperwork will be disposed via a secure disposal method, with only the summary sheet and digital information being retained.

In the case of long term/historic loans, the Society will take steps to contact the lender and negotiate either acquisition of the object(s), return of the object(s) or completion of a formal, finite loan agreement if one does not exist, or where a historic loan agreement no longer complies with current collections management standards. If the lender has died, the Society will contact the executor if known, or seek legal advice in order to ascertain their position with regards to acquisition or disposal.

3.1.5 Loans-Out

The Society is committed to sharing objects in its museum collections with a wider audience as far as is reasonable and practical, and has a vibrant and active program of loans out, both within the UK and internationally.

Loans-out must comply with the Society's *Standard Terms and Conditions for the Loan of Objects*.

Loans-out may be accepted for the following purposes:

- Display or exhibition.
- Identification or research.
- Photography.

The Society will only loan-out an object if the lender has signed a formal loan agreement, and complied with all associated terms & conditions. Loans-out will be recorded and formalised an Object Exit Form **and** by the signed loan agreement.

Loan documentation will be held in the 'Current and Forthcoming Loans Out' folder.

Loans-out will be fully documented, using a regularly maintained loans-in inventory and a corresponding filing system for hard copy documentation, and will be subject to security and condition checks.

At the completion of the loan-out, documentation relating to object exit, conservation and condition checks, publication information and research will be retained in the relevant Object History File. Information relating to the loan-out in relation to exhibitions will be retained digitally, including visitor numbers and press/publicity information.

3.1.6 Location and Movement Control

- No museum object will be moved, or location records amended, without permission from the responsible staff detailed in the Society's *Documentation Procedural Manual*.
- A record of up-to date locations for all objects in the Society's museum collections will be maintained.
- Object movement to a store external to the administrative boundaries of the organisation will also be documented on an Object Exit Form (see **Object Exit 3.1.7**).
- Object movement will be recorded on a Collections Trust Object Movement Ticket, and all moves for more than 24 hours (which extend outside normal working hours) will also be recorded on the collections management database and inventory at Burlington House, and on the Access database and inventory at Kelmscott Manor (depending on where the objects are stored/displayed).
- All records of previous locations will be maintained and archived on the collections management database and inventory at Burlington House, or on the inventory at Kelmscott Manor (depending on where the objects are stored/displayed) as an audit trail.

- Staff responsible for location and movement control are specified in the *Documentation Procedural Manual*. Movements carried out by other staff not specified in the *Manual* (excluding moves that take place as a result of disaster response) will be reported to the Head of Library & Collections.

3.1.7 Object Exit

Objects leaving the Society will be authorised for the following purposes:

- Return of loans-in.
- Return of objects left for identification.
- Loans-out.
- Move to an external store.
- Transfer to another organisation.
- Conservation.
- Framing.
- Photography.
- De-accessioning / disposal (including if an object is destroyed).

In the case of objects left with the Society as a loan or for identification, they will only be returned to the depositor on presentation of their copy of the Entry Form, and after signing the appropriate section of the form. An accompanying form of ID may be requested of the depositor before an object is returned.

The Society reserves the right to dispose of any objects deposited (and not accessioned) that a depositor has not come to collect within 4 months of notification that the objects are ready to be collected, and if no attempts have been made to collect the objects(s).

The Society reserves the right to dispose of any objects deposited (and not accessioned) in order to preserve and conserve its museum collections (i.e. in the case of infestation, chemical or hazard risk to the wider collections or building).

Every object exiting the museum collection will be recorded on an Exit Form, which will be signed by the remover/recipient and by an employee of the Society with collections responsibilities (the Head of Library & Collections, the Collections Manager, the Property Manager at Kelmscott Manor, or the Visitor Experience Manager at Kelmscott Manor). Copies of the forms will be allocated, filed and archived in line with the standards specified in the *Documentation Procedural Manual*.

White original copies of Object Exit Forms will be permanently archived in a storage area that is locked/access restricted without authorisation. Yellow copies of Object Exit Forms

will be given to the remover/recipient. Blue copies of Object Exit Forms will be archived in the relevant Object History File.

3.2 Procedural standards (additional)

3.2.1 Conservation

All conservation work will be recorded on the collections management database. The following information will be recorded:

- Date of conservation work.
- Type of conservation work (i.e. consolidation, repair, re-varnish etc.).
- Who carried out the work (i.e. name of the conservation organisation *and* the specific conservator).
- A summary of the conservation treatment report, including a brief description of treatment methods and materials.
- Recommendations for subsequent care, handling and storage.
- Images of objects before and after treatment.
- A reference specifying where to access the full conservation report (for pictures, this will be in the Picture Conservation History Files. For all other objects, conservation records will be held in the Object History Files).

See The Society of Antiquaries of London *Care and Conservation of Collections Policy* (section 4.8).

3.2.2 De-accessioning

- Accession Registers will be amended to record the date and circumstance for the de-accessioning.
- The relevant object or collections records on the collections management database will not be deleted but will be retained and the disposal recorded.
- If no collections management database record exists due to documentation backlogs, a new record will be recorded to document the disposal.

3.2.3 Object marking

The Society will label and/or mark all objects entering the permanent museum collection in order to maintain a clear connection between the object and its associated information.

Labelling and marking techniques used will:

- Be appropriate for the object.

- Be appropriate for the material the object is made from.
- Be durable yet reversible.
- Consider the object's aesthetic and conservation condition.
- Comply with guidelines and recommendations made in the *Collections Trust Labelling and Marking Museum Objects Booklet*.

Loans In will be labelled where possible (using tie-on labels only) with a reference/Entry Form number for the purposes of location control and information management during the period of the loan.

The Society will comply with the guidelines provided by the *Collections Trust Labelling and Marking Museum Objects Booklet*. The Society will also take advice on the best way to mark objects in consultation with conservators where necessary.

4. Access to collections information

The Society is committed to working towards improving access to collections information. Some collections information can currently be accessed publicly via an online interface of the database provided by the Archaeology Data Service. This ensures there is a level of access to collections information available to the public and researchers, and this accessibility is something which the Society intends to work on improving and building on in the future.

The Society also hopes to enhance its online resources in order to further promote its collections and make associated information more accessible.

5. Security of collections information

The Society is committed to ensuring the physical security of its records. Operational procedures ensure access restrictions are in place to limit and control physical access to areas in which collections records are stored and maintained.

- Collections information will be recorded on a collections management system (currently a Mobydoc Micromusee database at Burlington House, and an Access database at Kelmscott Manor). The Mobydoc Micromusee database will be maintained by Montal, an external IT support service, and through membership subscription to the Mobydoc Micromusee User Group and Mobydoc support services. The Access database will also be maintained by Montal, an external IT support service. The collections management system (and all network drives) is backed-up on a nightly basis, with a monthly back-up of all systems archived for 6 months. Staff will also ensure that hard copy back-ups are created after substantial

changes or additions have been made to the collections management database, or to any associated collections inventories in Excel.

- Security copies of the accession registers will be maintained in the form of good-quality photocopies, bound together regularly in a secure form for Kelmscott Manor and duplicate print-outs of object records from Mobydoc Micromusee at Burlington House. The locations in which security copies of the accession registers are maintained and stored are specified in the Society's *Documentation Procedural Manual*.
- Physical access to areas in which collections are stored, or where collections information is held, is restricted. Keys are held by relevant staff only.
- Security of collections information is included in the Society's Risk Register, which is reviewed annually by the General Secretary and reported on to Council.

References

SAL Documentation Plan

SAL Documentation Procedural Manual

SAL Collections Development Policy

SAL Collections Care and Conservation Plan