

Review and Rationalisation of Collections at The Polar Museum



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Review and Rationalisation Good Practice Case Studies

This case study is one of a series of Good Practice Case Studies, researched and written by the Collections Trust, and funded by Arts Council England. These case studies aim to illustrate how Accredited museums have developed their strategy, policy and practice to meet the needs of their own services, as well as to meet the Accreditation Standard.

This case study explores collections review and rationalisation work which took place at The Polar Museum from 2009 onwards. It is published alongside:

- [A Guide to Selecting a Review Methodology for Collections Rationalisation](#)
- [Good Practice Case Study: Collections Review and Rationalisation at The Shakespeare Birthplace Trust](#)
- [Good Practice Case Study: Collections Review and Rationalisation at North Hertfordshire Museums Service](#)
- [Good Practice Case Study: Collections Review and Rationalisation at Leicestershire County Council Museums Service](#)
- [Good Practice Case Study: Collections Review and Rationalisation at Historic Royal Palaces](#)

The Polar Museum has Full Accreditation status, last awarded in April 2013

Accreditation, Review and Rationalisation

The **Museum Accreditation Standard** requires that Accredited museums have an approved policy for developing collections (also known as an Acquisition and Disposal Policy). (Accreditation Standard 2011, Arts Council England, 2. *Collections. 2.2 Development Policy*)

The policy must include:

- A statement of purpose
- An overview of current collections
- Future themes and collecting
- Themes and priorities for rationalisation and disposal
- Information about the legal and ethical framework for acquisition and disposal of items

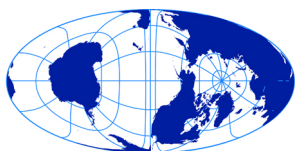
The Collections Development Policy encourages museums to consider rationalisation as a way to address collections management issues and make collections more accessible to visitors and users. Controlled rationalisation enables museums to develop a systematic and strategic approach to effective management and increased use of their collections, allowing them to maximise resources, refocus collecting activity and increase public access.

This case study explores collections rationalisation, placing an emphasis on the need to undertake rationalisation in the context of a planned and formal review of the collections. It focusses on how rationalisation can be linked to disposal, but can also create new and exciting opportunities for reconsidering the way in which museums use collections.

The Polar Museum: Case Study

The **Polar Museum** is part of the University of Cambridge. It holds a unique collection of artefacts, journals, paintings, photographs, clothing equipment, maps and other materials illustrating polar exploration, history and science. It manages its artefacts through four heritage collections: museum collections, a picture library, a library and a sound and film archive. The collecting of material commenced in 1934 and although objects have been added over the subsequent years and now number approximately 10,000, no systematic collections work had been undertaken for approximately 30 years.

Project summary



Scott Polar Research Institute
University of Cambridge

The collections review and rationalisation project was tied closely to a refocus by the museum on making the collections more accessible to the public, continuing to meet the Arts Council England Accreditation Standard and ensuring that the skills required for running an effective museum were present within the staff and volunteer team.

An additional incentive for addressing the collections issues was the Scott Centenary project in 2010; a major fundraising initiative which enabled refurbishment of the galleries and improvements to the overall management, care and use of the collections

The museum was one of a small number of museums selected to form a cohort supported by **Share Museums East** as part of a regional review and rationalisation project. The cohort approach enabled common tools to be developed by the group as well as a supportive environment within which to develop the project.

The project aimed to work on a small but significant number of objects which lacked documentation, were de-contextualised and which had been included in previously uncompleted inventory work; there were approximately 400 of these objects entered on the inventory list with a 'Z' prefix. The museum had limited catalogue information for the 400 objects and the initial focus of the project was to reconcile relevant information with objects.



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Working on object documentation

Project description

A pilot group of 40 objects was selected. A documentation check of paperwork and letters was conducted and objects were measured against the following checklist criteria:

- Provenance
- Resources used
- Collections Policy (Polar Regions)
- Condition
- Duplication
- Health & Safety
- Ownership / Ethically Sound
- Rationalisation Option

Sources outside the museum, including previous professors and staff members were consulted and contributed to the information gathering exercise.

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Locating objects in the stores

'We knew it would be a slow process so we started with a pilot of 40 objects; all objects were photographed and we used a checklist for measuring objects against criteria linked to our collections development policy. The time consuming elements focused around chasing a paper trail and looking for paperwork and letters of ownership. The documentation was essential in confirming ownership and the knowledge that the museum could dispose of an object if required.'

'Having good documentation and photographic evidence to show clearly that an object had decayed helped immensely in demonstrating our case to the governing body.'

Volunteers and interns supported paid staff in the matching of objects with information. This proved to be a very positive approach and worked well, individuals concentrated on a few objects at a time and were able to make significant progress on the overall project, as well as having an achievable target and finite end to their work.

The collections review process resulted in:

- A number of objects being identified and matched with accession numbers and information
- The identification of several objects which did not fit with the central polar theme of the collections development policy and were identified for rationalisation
- A number of objects in such poor condition they were not fit for any useable museum purpose.



Working in the Archives

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Following the Museums Association (MA) [Code of Ethics](#) and using the MA [Disposal Toolkit](#) as a guide, the objects identified for rationalisation from the pilot were offered through the Museums Association [Find an Object](#) portal; no museum expressed an interest.

A number of disposals were approved by the governing body. However, the museum was concerned that all objects, even those at the end of a useful life, should serve a positive purpose. To this end, several items were repurposed within the museum for handling and schools use, whilst those in extremely poor condition proved useful as teaching aids for the conservation team, demonstrating the damage caused by inadequate collections care.

There were several remaining items, two of which were deaccessioned and repurposed as part of the [Curating Cambridge](#) programme. An artist worked with the objects, deconstructing them to create a new and vibrant artwork.

'It was been very interesting working with artists and enabling moribund collections to come to life again.'

Following the initial pilot of 40 objects the remaining 'Z' items were reviewed and rationalised, using the approach learned in the pilot project.

'We used the tools to develop a bespoke framework for our collections and also our management and decision making structures.'

Outcomes and lessons learned.

- A sizeable collection of material which was lacking associated information, particularly donor information, has been worked through and addressed
- The museum has a greater and better understanding of the collections and how best to use them
- To complete the process properly and comprehensively can be a slow process and the use of volunteers and interns was crucial to its success

- For any rationalisation or disposals project the documentation confirming provenance is incredibly important
- The MA Disposal Toolkit was important in supporting strong management recommendations and justifications for the decisions made about the collections
- A number of items were disposed of, but the emphasis was always on reuse, so some items were moved into a handling collection and other objects marked for transfer to different museums
- The museum stores have been reordered in a different way, which has assisted research and very clearly enables a visual representation of taxonomic development of collections
- The museum has increased and improved use of spaces – the process encouraged improved management of stores and has brought similar types of materials together.

‘It is a positive change to know exactly where everything is and to have made use of the rationalisation process to enable us to upgrade our storage and make it more accessible to our users.’

‘Do it! It is the most illuminating process and we have learnt so much from it. We are much more confident about making collection disposals because we have a strong framework within which to do it.’

Next steps

The project has been judged a success by the museum with a reinvigoration for research and collections work and a better understanding of the collections and how best to use them. Staff have gained the confidence and tools to consider reviewing other areas of the collection.

The museum will continue to use the process to enable greater knowledge and understanding of collections, with selective parts of the collections being worked on at one time; the museum finds having smaller targets is important in celebrating the progression of collections projects.

There is finite space for storage, which has also obliged the museum to look for different ways to use areas of the collections. This has included repurposing items for handling and work with schools and has freed up resources for other areas of collections. In particular, there is a current focus on using collections review methods to identify gaps in the collections and enabling the museum to do more about contemporary collecting.

Case Study published by the Collections Trust, November 2014, with funding from Arts Council England

Appendix 1: The Polar Museum, Scott Polar Research Institute Collections Rationalisation Plan

Prepared by Heather Lane and Willow Silvani, The Polar Museum, Scott Polar Research Institute

Date: 08 March 2012

Agreed by/Date: 14 March 2012

Next review date- 2014 [date tbc]

Mission statement and how collections are used to achieve our mission

The mission of the Polar Museum is to promote understanding and appreciation of the cultural heritage resulting from the exploration and scientific study of the Polar Regions by organisations and individuals of all nations, but particularly by those of Great Britain.

This is achieved, for public benefit, by collecting, documenting, preserving, exhibiting and interpreting material evidence resulting from past human activity in the Arctic and Antarctic, and also by promoting interest in, and understanding of the heritage through education and outreach, by making the Institute's collections and associated information available to all.

Stage 1: Foundation for Collections Rationalisation

Definition of Collections Rationalisation

For the purposes of this plan rationalisation is defined as improving public benefit by refining a collection in line with the museum's mission statement.

Principles of Collections Rationalisation

See the attached copy of Principles at the end of this plan

Overview of collections

The Museum's collections are considered to be of national and international importance. The collections form part of an international centre for research and reference relating to the science, exploration, history, geography and environment of the Arctic and Antarctic. Although artefacts relating to polar exploration and research may be found in several British collections, the Polar Museum is the only one with permanent displays on a range of Arctic and Antarctic expeditions and on polar science and geopolitics. It is also the only one within a UK Higher Educational Institution.

The Museum's collection consists of:

- Arctic collection: (600+ items) illustrative of Arctic material culture, such as clothing, textiles and transportation.
- Arctic exploration (1500+): material relating to a range of expeditions, including those of Sir John Franklin, John and James Clark Ross, Buchan and Back and Nares.
- Antarctic collections: (3000+ items) artefacts relating to the history and technology of exploration, from 1885 to the present, including R.F. Scott's last letters, Amundsen's sextant measurements of the position of the South Pole and Captain Oates' sleeping bag; sledges, foodstuffs and equipment from 20th and 21st century expeditions.
- Scrimshaw collections (78 items)
- Paintings (2500+ items) including over 500 watercolours and around 300 sketches by Edward Adrian Wilson and the earliest extant sketches on paper made by Canadian Inuit.

The Museum displays approximately 400 items and rotates around 25 items through the permanent displays each year. A further subset of items from the reserve collection is included in temporary displays each year. There are on average three such special exhibitions each year.

All reserve collections are stored on site, but negotiations with the University are in progress to acquire suitable offsite storage if needed, in conjunction with the other University museums, to accommodate acquisitions received in the next fifteen years. There is no immediate urgency but additional storage for long objects would be desirable.

Items are lent to other accredited/national museums and galleries on request, with the approval of the Management Committee. There are on average around six requests for material each year for national and international exhibitions, ranging from single items to larger collections.

Items currently on loan to the Polar Museum amount to 508 in total (328 objects, 180 artworks). Of these, the majority are on very long term (so-called 'permanent' loan) where the Museum is making efforts to ensure that ownership is transferred. Approximately 40 items are recent short-term loans for fixed periods, usually renewable on a five-yearly basis.

Collections in relation to Forward Plan and Acquisition and Disposal policy

Our aims for rationalisation of the collections are included in the Museum's Forward Plan and Acquisition and Disposal policy and are consistent with the current scope of the collections. Current work is revealing materials which appear to be outside our collecting areas and which are inconsistent with the ways in which the collection might develop in the future. Further work is needed on the provenance of these items.

This plan relates to the Museum's strategic aims for collection development as outlined in paragraphs 6 and 10 of the Forward Plan for the period 2012-2014 (currently under revision). Copies of the draft Forward Plan and Acquisition and Disposal Policy are on file.

Key collection management and/or other issues affecting public benefit which have motivated this Plan

This plan has been developed in response to the recognition of the obstacles to collection development presented by a group (ca. 289 items) of decontextualised objects identified after the inventory project, which was completed in 2009. These objects require research to identify whether they are of intrinsic interest, how they may relate to the existing collections, whether they are items which have been accessioned but cannot be identified as they no longer retain their original numbering and whether they may be of value for research or display.

Further work is required to identify the potential public benefit of this material in relation to possibilities for research, display, handling and education and outreach programmes.

We recognise the difficulties arising in the management of a further set of materials within the collections on long-term loan, where the loan was intended to be permanent, which is no longer a category used within professional museum practice. Research needs to be carried out to identify the current owners before contact can be made to resolve the transfer of title.

Intended outcomes from collections rationalisation related to public benefit

The public will benefit in three ways:

- The Museum will have a clearer idea of and enhanced information about what we hold, and will be able to pass this information onto researchers, visitors and other user groups.
- This research will give us potential for new displays and exhibitions, widening the scope of material on display, attracting a broader range of visitors and enhancing their enjoyment and learning.
- Material may be disposed of by depositing at a more appropriate institution where *it will be more accessible to the public by being better used for research or handling or for display.*

Overview of Collections Rationalisation potential

The majority of the collections have been subject to a major inventory control programme over the past two years. We have identified a group of 289 de-contextualised objects, numbered with a 'Z' prefix (meaning not properly accessioned) within our collections that have rationalisation potential. A number of these objects are textiles or clothing, which may be included as having rationalisation potential for this project, but the work may be done at a later date as part of a longer-term textile storage project. It is likely that these 'Z' numbers will be found to correspond to earlier accession records for items for which the current location is unknown.

Collection area	Estimated number	Rationalisation potential
Arctic material culture	600	No
Arctic exploration material	1500	No
Antarctic material	3000	No
Paintings	2712	No
Textiles	1059	Yes
Scrimshaw	78	No

An alternative means of considering the problem would be to address known issues, as follows:

Permanent	Estimated number	Rationalisation potential
'Permanent' loans	508	Yes
De-contextualised objects	289	Yes

Stage 2: Preparing for Collections Rationalisation

Methodology for review of collections to identify items for rationalisation

Key drivers to keeping material:

- Public benefit
- Reputation and profile
- Deliver strategic ambitions

Material in the following categories will be considered for rationalisation:

- Objects that fall outside the museum's collection development policy
- Objects which are shown within the catalogue as being on 'permanent loan'
- Objects that have little or no contextualisation or provenance information
- Objects for which there is no reasonable expectation of being useful for display, research or education and outreach.
- Material deteriorated beyond any useful purpose (e.g. through decay or infestation)
- Unnecessary and/or poor quality duplicates
- Where there is no reasonable expectation that SPRI will be able to provide suitable levels of curation or collections care and where an object would receive a better standard of care, be more publicly accessible or be more effectively used at another institution
- Material which poses a threat to other objects or people and is therefore inaccessible (e.g. through infestation or health and safety concerns)
- Objects on long-term loan, where the original owners cannot be traced after an appropriate Due Diligence attempt to return the object has been made, but only where such objects fall outside the museum's collection development policy.
-

Assessing items for rationalisation

Object Assessment forms:

- Collections assessment and rationalisation options
- Collections assessment
- Condition reporting - prompt sheet
- Decision to dispose checklist
- Action once decision is made checklist
- Assessing the benefits

These form and checklists will be tested and refined during the pilot project phase.

Staff/volunteers who will work on collections rationalisation

- Heather Lane – Librarian and Keeper of Collections
- Willow Silvani – Asst. Collections and Loans Registrar
- Sophie Row Conservator (in post by April 2012)
- Christine Rozeik – Conservator (in post by May 2012)
- 1 volunteer 1 day a week

We will write a role description and recruit to a voluntary placement (museum intern, current SPRI volunteer or qualified person seeking current work experience) to start work in early 2012.

Overall management responsibility and reporting arrangements for rationalisation

Heather Lane – Librarian and Keeper of Collections – has overall responsibility for rationalisation.

A weekly and monthly rationalisation meeting cycle will be instated between Heather, Willow Sophie, Christine and the volunteer. The volunteer will report to Willow who will report to Heather.

Other resources required [e.g. finance, space, equipment, training]

- Finance - Project will be financed from the existing budget, supplemented by part of the Effective Museums grants for work on the textile collection and on the pilot rationalization project.
- Space - Two areas of workspace inside and outside Museum Store A have been identified as suitable for this project.
- Equipment - Good supplies of all the equipment required are already in stock.
- Training - Willow Silvani will investigate training and other resources available within and beyond the University to strengthen her skills in working with volunteers. Training for the volunteer will be provided in-house.

Overall timescale

This project is to be built into the Forward Plan for the period 2012-2014. This is viewed as a process for gradual completion in the medium term.

Published standards and guidance

- Museums Association: <http://www.museumsassociation.org/> (Code of Ethics and Disposals Toolkit)
- Arts Council England (ACE) formerly MLA: <http://www.arstcouncil.org.uk/> (The Museum Accreditation Standard)
- Collections Trust: <http://www.collectionstrust.org.uk/>
- BSI: PAS 197 Code of Practice for Cultural Collections Management (PAS 198 due out end 2011 – will borrow from Cambridge University Library)

Basic workplan

Starting dates will be added for the work when the SPRI forward Plan 2012-2014 is completed. This is likely to coincide with the appointment of a new Conservator, who is expected to be in post by April.

Collection area	Action	Personnel	Timescale
De-contextualised objects: Textiles	Audit of Museum Store B	WS/Vol/Conservator	June 2012 - June 2014
	Assess against criteria	WS/HL	
	Match Z against unlocated	WS/Vol	
	Decision to dispose or accession	HL/WS > LAM	
	Put decision into effect	HL/WS	
De-contextualised objects: Other	Identify locations and group items by type to aid expert	WS/Vol/Conservator / Expert	April 2012 - Oct 2013
	Assess against criteria	WS/HL	
	Match Z against unlocated	WS/Vol	
	Decision to dispose or accession	HL/WS > LAM	
	Put decision into effect	HL/WS	
'Permanent' loans	Generate list of lenders	WS	June 2014 - June 2016
	Research provenance	NAB/Vol	
	Contact lenders or estates	HL	
	Assess against criteria	WS/HL	
	Decision to dispose or accession	HL/WS > LAM	
	Put decision into effect	HL/WS	

Stage 3: Implementing Collections Rationalisation

This Stage will follow the process in the Museum Accreditation standard and the MA's Disposal Toolkit but allow for differences in the case of options such as loans and handling material. The main steps will be:

a) Selection of items

Based on written criteria

b) Checking ethical and legal considerations

We will observe the considerations as set out in the Museum Accreditation standard and the MA Code of Ethics. We will check all original documentation (e.g. provenance files) for any donor/funding body conditions or requirements. Legal considerations include checking recommended disposal methods for potentially hazardous materials in the collection (poison in medical kits etc), carrying out due diligence on ownership of material on loan.

c) Deciding on specific rationalisation option

Appropriate option chosen from range listed in the Principles of Collections Rationalisation. Decisions to be made by the Keeper in conjunction with the Asst. Registrar and after consultation with other team members.

d) Taking formal decision on rationalization

Recommendations are made by the Keeper and Assistant Registrar, which are put forward at the Library, Archives and Museum (LAM) Collections Management Committee, and then formally ratified by the SPRI Management Committee (SPRI governing body).

e) Deciding how consultation and communication will take place

We will increase communication within other departments within SPRI and within other University departments about the rationalisation programme, and also with a wider audience via our online website conservation blog: <http://www.spri.cam.ac.uk/museum/conservation/>. At the point where decisions to dispose are taken, we would open this consultation and communication process to the wider public through additional channels (e.g. newsletters, web site, email, meetings with volunteer group, etc). In certain circumstances, we may elect to involve local or national media.

f) Seeking a new owner if necessary

We will produce formal written criteria to decide against.

g) Confirming new arrangements or re-evaluating options for rationalisation

A copy of the Disposal flowchart is attached. Decisions will be evaluated, challenged if a member of the team/other has an opinion, and then ratified formally. Not all material will be disposed of; it is likely that some may be re-allocated.

h) Implementation will be tested on a small group of materials and the process will be refined as appropriate.

A two month pilot project beginning in January 2012 – the pilot project will target a small group of materials representing known problematic areas:

- Where there is little or dubious provenance information which needs more research

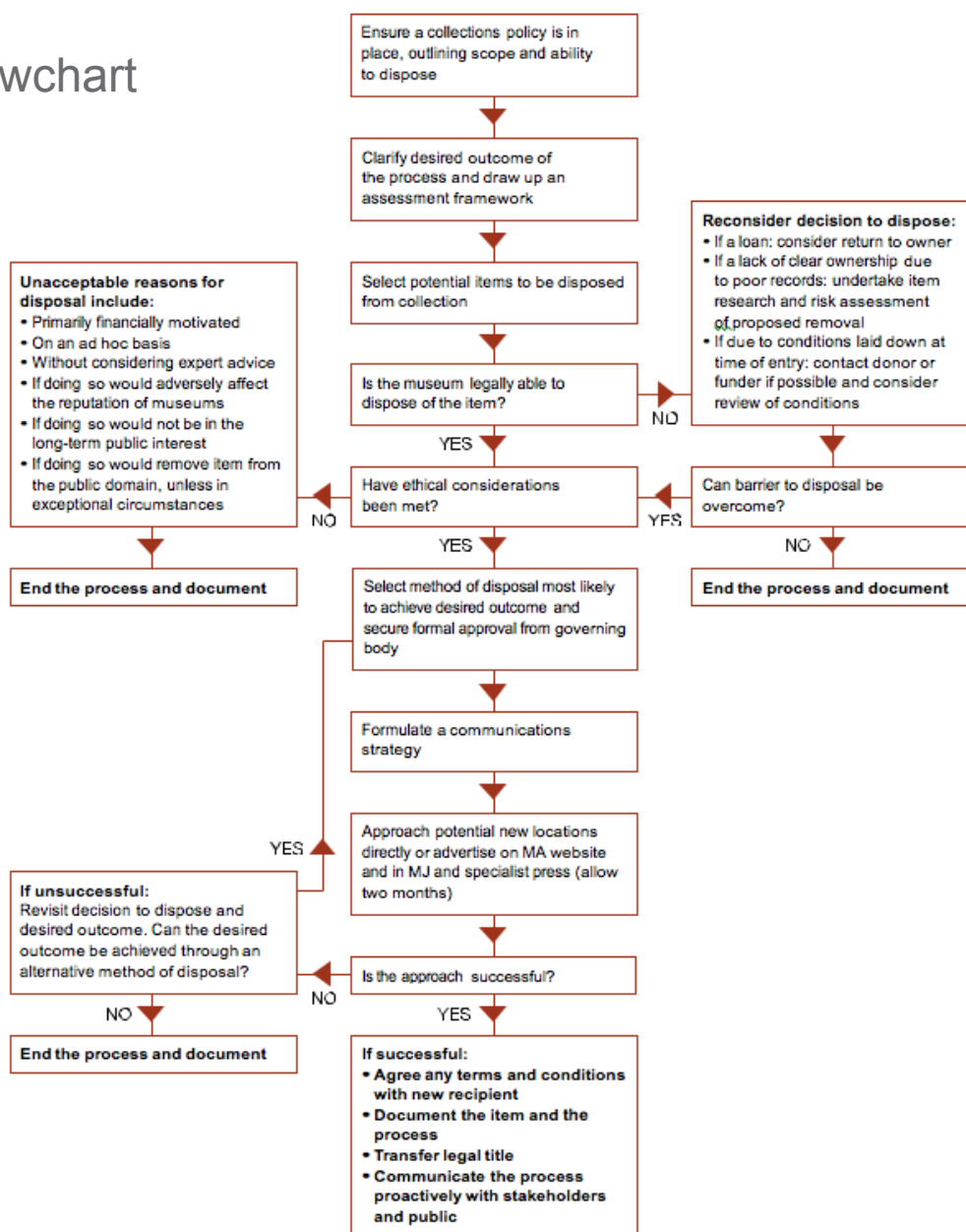
- Objects that may already be accessioned but are detached from that information
- Objects that can be accessioned into the collection with modicum of research subsidiary elements to identify:
- Objects include hazardous materials (e.g. poison)
- Objects do not fit in with the SPRI collection development policy

Stage 4 Post-rationalisation action

On completion of the process, or at key stages as appropriate, we will amend the museum’s plans, policies and processes as necessary. Review to be carried out by Librarian and Keeper of Collections and the Assistant Collections and Loans Registrar.

- All policies must reflect current practices and lessons learnt.
- All processes must be consistent with Accreditation standards.
- Known inconsistencies in plans, policies and processes will be amended (changing filing/storage locations, updating job titles/responsibilities, etc).

Disposal flowchart



The Polar Museum, Scott Polar Research Institute Principles of Collections Rationalisation

“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

Principles

1. Collections will be used to achieve our mission

The mission of the Polar Museum is to promote understanding and appreciation of the cultural heritage resulting from the exploration and scientific study of the Polar Regions by organisations and individuals of all nations, but particularly by those of Great Britain.

This is achieved, for public benefit, by collecting, documenting, preserving, exhibiting and interpreting material evidence resulting from past human activity in the Arctic and Antarctic, and also by promoting interest in, and understanding of the heritage through education and outreach, by making the Institute’s collections and associated information available to all.

2. Collections will be used effectively to benefit the public

Public benefit is achieved by using the collections for display, research, handling, demonstration or 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 mission, 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 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
- Converting long-term loans into gifts
- Recalling items on loan to other organisations
- Disposal by gift to another Accredited museum or to other organisations or individuals
- Disposal by sale to another Accredited museum or 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 governance of the museum and its charitable status as part of the University of Cambridge
- 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 be different 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 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.