

Review and Rationalisation of Collections at the Shakespeare Birthplace Trust



Contents

- ◇ Review and Rationalisation Good Practice Case Studies
- ◇ Accreditation, Review and Rationalisation
- ◇ The Shakespeare Birthplace Trust: Case Study

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 Shakespeare Birthplace Trust from 2010 onwards. It is published alongside:

- A Guide to Selecting a Review Methodology for Collections Rationlisation
- Good Practice Case Study: Collections Review and Rationalisation at The Polar Museum
- 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 Shakespeare Birthplace Trust museums all have Provisional Accreditation status, the most recent award being June 2014.

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 Shakespeare Birthplace Trust: Case Study

The **Shakespeare Birthplace Trust**, in Stratford-upon-Avon is an independent charity managing five Shakespeare family homes. The Trust holds extensive museum, archive and library collections covering a wide range of subject areas relating to Shakespeare, his life and times and his global legacy.



Project summary

The project commenced in 2010 and focused on review and rationalisation of a collection of late 19th century and early 20th century agricultural objects, which had been collected mainly in the 1970s and 80s.

A shift in emphasis at the Mary Arden's farm site, which had been operating as a wider countryside museum and now, in line with the current strategic objectives of the Shakespeare Birthplace Trust, is a working Tudor farm, provided the impetus for the review.

The project aimed to assess the significance of the objects and their relevance to the Trust's statement of purpose and strategic objectives.

Securing support and funding from the Museums Association (MA) *Effective Collections* programme enabled the project to reach a successful conclusion.

Project description

An initial inventory of the collection was completed, which indicated approximately 700 objects to be reviewed. This enabled all information about an object to be considered, including its acquisition history, accession information, object history file information and conservation records. As a result a clear understanding of title to the object was established. The provision of good basic object documentation was important in enabling this part of the project to progress.

Each object was assessed using basic criteria as a guide and then matched against the current acquisition and disposal policy. The criteria asked four key questions of each object:

- Is the object related to the times of William Shakespeare? (defined as 50 years before and 200 years after his death)
- Is the object related to William Shakespeare's work or life?
- Is the object related in geographical terms of use? (defined as within a 10 mile radius of Stratford-upon-Avon)
- Is there relevance for the object in the Trust's properties, i.e. was it used, produced or associated with any of the Trust buildings?

Following analysis against the criteria, the project concluded that a range of objects should be retained in the collections, whilst others were recommended for disposal.

The Trust followed the MA *Code of Ethics* and the MA *Disposal Toolkit*. With appropriate governing body approval established, the Trust implemented the following:



Items laid out in store following the review

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- Objects on loan to the museum were reviewed; 20 loans were returned to their owners
- If an object had been donated in the 15 years prior to the collection review, or contact had been made with the donor in the past 5 years, then contact was established to discuss options, including, in some instances, return of the object to the donor. This proved to be a positive approach as the museum was able to explain to donors the reasoning behind the disposal
- Objects identified for disposal were advertised for transfer to other museums via the Museums Association 'Find an Object' website; seventy nine objects were transferred to other museums
- A small number of objects were transferred to the Trust's education department for use in handling

- The remaining objects were auctioned, with a specialist auction house selected to conduct the sale. Income received from the sale was ring fenced within a restricted funds project budget, the purpose of which is to develop the collections.



Wagons moved outside ready for the auction

The Trust adopted a robust and transparent communication plan for the collections review.

This was a positive approach enabling stakeholders and everyone interested in the museum to understand the reasoning behind the collections review and the eventual disposal of some items.

Outcomes and lessons learned.

- The grant and support from the MA [Effective Collections](#) project, including the museum's Effective Collections Mentor, Sarah Daly, was instrumental in enabling the project to get started
- Some long standing loans were originally challenging, as information and contact with lenders had lapsed

'The importance of good documentation cannot be stressed enough. The status of some items was ambiguous and researching and locating all the relevant paperwork was crucial to ensuring a successful outcome.'

- All objects sent to auction were sold. This was a positive outcome and the result of selecting a specialist auction house to handle the sale
- The restricted fund, created from the sale of the auctioned objects, supported a range of collections development activity, including the purchase of objects to add to the collections and enhance the current collections development policy
- Managing the media with effective and clear messaging was key to project success

'We received some comments from individuals, which were dealt with on a one to one basis, but on the whole it was a positive exercise and even those who did not like the decisions, fully understood the rationale behind it.'

- Collections review is now an integral part of wider collections management work at the Shakespeare Birthplace Trust and is used to answer a range of questions relating to collections care and use.

Next steps

Since the initial first review of the agricultural collections the Shakespeare Birthplace Trust has embarked on similar reviews with a range of collections. The focus is very much on using collections review to enhance use and understanding of collections and with less focus on disposal. Collections reviews are developed using clear criteria and staff have used the published sources of the East Midlands Reviewing Significance Framework and

the University College London Collections Review Toolkit to create individual criteria for different collections.

Examples of other reviews include:

- A review of costume and its associated archive with the Royal Shakespeare Company focussing on significance, increasing understanding of use and object condition
- A review of the Trust's archaeological collections to better understand their significance and potential use
- A furniture collections review where some items which were set dressing have been disposed of, increasing space in the stores for more relevant permanent collections.

'Since the first project reviewing collections is now seen very much as part of our normal everyday collections activity, we have found it a very positive way to think about our collections strategically. It has given us the confidence to carry on reviewing collections and not to be daunted by it. We have better understanding and knowledge of our collections and we are keen to move on to other subject areas; in the future we will be addressing coins and medals and the art collection.'

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