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1: The History Trust of South Australia

The History Trust of South Australia administers the Community Museums Program (CMP). This program was formerly called the Museums Accreditation and Grants Program (MAGP).

About the History Trust

The History Trust is a statutory authority of the South Australian Government, reporting to Parliament through the Minister for the Arts. It was established in 1981 under the *History Trust of South Australia Act (1981, 1995, 2005)* to encourage the research and public presentation of South Australian history and to safeguard South Australia's material heritage.

The Trust's central administration is located at the Torrens Parade Ground, Victoria Drive, Adelaide, but its main public face is presented by three history museums, the Migration Museum, National Motor Museum and South Australian Maritime Museum, and the History Trust Exhibition Gallery. The Trust also assists community museums and historical researchers through its Community History Programs, which include SA History Week and the State History Conference.

History Trust vision

To inspire South Australians to reflect on the present and imagine the future, through an active engagement with their past.

History Trust mission

To bring South Australian history to life and preserve it for future generations. This will strengthen community identity and foster a strong sense of place.

To achieve this, the History Trust aims to:

- present imaginative, innovative and inclusive public programs that enlighten, promote reflection, challenge and entertain
- maintain and develop the State History Collection to best practice standards to preserve South Australia's material history
- foster quality research in South Australian history that is challenging, independent and inclusive
- form partnerships with regional and other community organisations to better present and preserve local histories and collections
- collaborate with regional, national and international partners to make South Australia's distinctive stories better known
- manage resources in an equitable and sustainable manner

2: The Community Museums Program

The History Trust of South Australia established an accreditation and grants program for regional, local and specialist community-based museums in 1982, called the Museums Accreditation and Grants Program (MAGP).

In October 2008 this program became known as the Community Museums Program (CMP).

What does the CMP do?

The Community Museums Program:

- sets standards for community history museums, and
- provides grant funds (currently set at \$150,000 annually)

Standards programs

The Community Museums Program is similar to other Australian and international museums accreditation or standards programs. The programs may differ in detail, but all have the intention of improving and sustaining museums, large and small, and fostering public confidence in the role of museums in the community.

Aims of CMP

Through the Community Museums Program, the History Trust:

- supports regional, local and specialist community history museums to:
 - interpret and present aspects of South Australia's history relevant to their purpose
 - collect, manage and preserve the cultural material that is the evidence of that history
- sets standards across a range of museum activities
- provides advice, assistance and skills development opportunities to help museums achieve, maintain and enhance these standards
- provides access to grant funds for participating museums
- supports the development of a strong network of high-quality community museums throughout South Australia

Who is the Community Museums Program for?

The History Trust invites South Australia's community-based museums to register in the Program. It is open to regional, local and specialist community-based museums that focus on the presentation and preservation of aspects of South Australia's history.

Community-based history museums in the History Trust's Community Museums Program may be called historical societies or associations, preservation societies, historic houses or precincts, interpretive centres, heritage centres, galleries or archives, as well as museums. The word, *museum*, as it is used throughout the Handbook, encompasses all of the above variations.

Benefits of the CMP

Museums participating in the Community Museums Program enjoy the following benefits:

- Access to the History Trust's annual grant funds set aside specifically for CMP museums
- Gaining an understanding of principles and standards essential to museum development, management and sustainability
- Access to ongoing advice, assistance and skills development opportunities on all aspects of museum and collections management
- Enhanced public status, recognition and credibility with their local community, visitors and tourists
- Enhanced status, recognition and credibility with funding providers and sponsors
- Community confidence that the museum operates according to the essential requirements of good museum practice
- Opportunity for self-assessment and continuous improvement
- Basis for arguing for resources and training to meet standards
- Source of pride for museum workers, knowing that their museum is following nationally accepted standards in museum practice
- Promotion on the History Trust's website
- Opportunity to be involved in collaborative history projects, and other History Trust programs such as SA History Week and the State History Conference
- Regional and state-wide networking opportunities with other registered and accredited museums to share ideas, problems, knowledge and resources

Obligations and responsibilities of CMP museums

In joining the Community Museums Program, museums agree to:

- become familiar with and refer to the National Standards for Australian Museums and Galleries, on which the Community Museums Program is based
- monitor and review the museum's ongoing compliance with the National Standards and requirements for participation in the Community Museums Program
- be an active participant in the Community Museums Program
- acknowledge that working in a museum requires special skills and knowledge; and thereby seeks appropriate training and refers to resources on good museum practice
- consult with History Trust staff before developing or beginning significant collection, archival, conservation and interpretive projects
- apply regularly for CMP and other grants to assist in the continuous improvement of museum operations

Joining the Community Museums Program

Participation in the Community Museums Program is set at two levels:

- Registration
- Accreditation

Registration

A registered museum has demonstrated its intention and commitment to applying the standards to its operations and activities, according to its individual circumstances and resources.

Accreditation

An accredited museum has demonstrated its capacity not only to meet the standards required of registered museums, but also to achieve and maintain further standards that demonstrate a high and sustained level of operation. Accredited museums are models of excellence for the community-based museums sector.

The History Trust encourages all registered museums to aim towards accreditation status, and will assist any registered museums who indicate this intention. At the same time, the Trust acknowledges that achieving accreditation may be difficult for some museums.

Becoming a CMP museum

Community-based history museums must be one of the following:

- An incorporated not-for-profit community association
- A branch of the National Trust of South Australia
- A committee of management, appointed under 'Subsidiaries' Section 41 of the *Local Government Act*, or appointed by a parent organisation such as a school, university, church or corporation
- A community service provided by a local council

Not eligible

The History Trust's program is designed for history-focused community-based museums.

Organisations which hold collections, such as a community archives, but do not display their holdings through public display programs, are not eligible to join the Program.

The focus is on South Australian history, and therefore the CMP is generally not open to other types of museums, including art museums, art galleries, or science museums. However, if these museums incorporate aspects of South Australia's history into their public programs and their collections, then they may be eligible to join. The History Trust will consider their eligibility on a case-by-case basis.

The Program is designed for community-managed and publicly-accountable museums. Privately-run museums and collections are not eligible to participate in the Program.

The History Trust will, however, on request, give advice, assistance and skills training to any of the above organisations on matters relating to museums and South Australian history.

Going for CMP registration

Key points:

- A community-based history museum may apply to register in the Program at any time.
- A museum wishing to join the CMP must inform the History Trust of its intention to do so, prior to submitting any formal documentation. This gives the Trust the opportunity to:
 - check eligibility
 - establish a working relationship with the museum
 - explain the process
 - work with the museum to set a reasonable timeline
 - offer advice and answer questions
- The decision to seek registration should come from the museum committee as a whole. A smaller group (committee members and other museum workers) may then be delegated to manage the process, reporting regularly to the main management committee.
- The registration process may take some time; in general, allow 9-12 months.

Steps towards CMP registration

Steps towards registration:

1. The museum contacts the History Trust to indicate intention to apply to join the Program.
2. The History Trust confirms eligibility and establishes a working process.
3. The museum obtains a copy of the CMP Handbook from the History Trust.
4. The museum assesses its operations and programs against the set standards and History Trust requirements, which are outlined in the Handbook, making changes and seeking assistance from the History Trust, as required. Museums should work through the CMP Handbook in the order in which the requirements are presented, as there is a logical structure and the standards build on each other.
5. At the same time, the museum gathers together the written information required to be submitted to the History Trust, as indicated in the Handbook.
6. The museum requests in writing that the History Trust begins the formal assessment process.
7. With this formal request, the museum submits all required written evidence.
8. Once it has reviewed the written submission, the History Trust may request further changes or further information.
9. Once the History Trust is satisfied with the written documentation, it makes arrangements with the museum to conduct a site assessment, according to the requirements set out in the Handbook; again, the museum may be required to make further changes.
10. Once the History Trust is satisfied that the museum meets the required standards, the History Trust recommends the museum's registration to the Chief Executive.
11. The History Trust writes to the museum to inform it of its registration status, and lists any further action agreed between the parties during the assessment process.
12. A Certificate of Registration is presented to the museum for display at the entrance of the museum or other appropriate location within the museum. This is an important public acknowledgement of the participation of the museum in the Community Museums Program.

Once a museum is registered

Registration status is on-going.

The History Trust recommends that registered museums review their operations and programs regularly to ensure that they are continuing to apply and maintain the required CMP standards. History Trust staff are happy to assist in any such review and offer follow-up advice, assistance and training.

The History Trust also monitors the museum's commitment and intention to maintaining the set standards, through means such as:

- annual CMP questionnaire, which all registered and accredited museums are required to complete
- grant applications
- skills development workshops
- field visits
- informal communication, such as email requests for information or advice
- formal review of museum operations conducted by the History Trust or appointed consultant

Registered museums are eligible to apply for CMP grants. They also receive the Program's newsletter, which is distributed every 2 months to museums in the CMP network. This newsletter provides ongoing advice about museum standards, includes news from the network of registered and accredited museums, and keeps the CMP network informed about grants, workshops and other matters.

Special note: every museum is different

The History Trust acknowledges that community-based history museums will achieve and maintain the required standards, according to their individual circumstances and resources.

Leaving the Program

The History Trust may 'de-register' a museum if:

- the museum no longer wishes to be in the Program
- the museum changes its status to a privately-run museum
- there is a clear lack of commitment to applying and maintaining required standards
- the museum is unviable
- the museum closes
- the museum has inappropriately used History Trust grant monies

Before a museum leaves the Program, any outstanding grant monies must have either been acquitted or returned to the History Trust.

Steps towards accreditation

An accredited museum is able to demonstrate that it has maintained and enhanced the required standards for accreditation over a period of time, and has the commitment, resources and capacity to continue to operate according to these standards of excellence into the future.

Steps towards accreditation:

1. A registered museum must have been in the Program for at least three, but usually around five years, before it can apply for accreditation.
2. The museum informs the History Trust of its intention to seek accreditation, so that the Trust can provide advice and assistance before the museum makes a formal submission.
3. The museum assesses its operations and programs against the set standards and History Trust requirements for accreditation, which are outlined in the Handbook, making changes and seeking further assistance from the History Trust, as required.
4. The museum submits to the Trust a written statement indicating its readiness for accreditation assessment, with an accompanying folder of required written evidence, as set out in the Handbook.
5. Once it has reviewed the written submission, the History Trust may request further changes or information.
6. Once the History Trust is satisfied with the written documentation, it makes arrangements with the museum to conduct a formal site assessment, according to the accreditation requirements set out in the Handbook; again, the museum may be required to make further changes.
7. Once the History Trust is satisfied that the museum meets the required accreditation standards, the History Trust submits a formal recommendation for the consideration and approval of the Board of the History Trust of South Australia.
8. The Board informs the History Trust of its decision.
9. Upon Board approval, the History Trust writes to the museum to inform it of its accreditation status.

Once a museum is accredited

Accreditation status is awarded for a period of five years.

Once a museum has been awarded accreditation status:

- The History Trust will negotiate with the museum on the timing and format of a ceremony to present the museum's accreditation certificate.
- In the grant round following accreditation, the museum is allocated a one-off grant of \$5,000, for a major display or collections management project, as devised in consultation with the History Trust.
- In addition, accredited museums are generally entitled to apply for larger grants than registered museums.
- After five years, the museum's accreditation status is formally reviewed and may either be renewed or the museum reverts to registration status.

Key dates* in the CMP year

February	Newsletter distributed
March	Reminder to acquit outstanding grants
April	Newsletter distributed
May	SA History Week Grant guidelines and application form distributed to all museums in the Program
June	Newsletter distributed 1 June: grant round opens 30 June: grant acquittals due
August	Newsletter distributed 31 August: grant round closes CMP annual questionnaire distributed State History Conference
September	Grant applications assessed and recommendations prepared for the History Trust Board
October	Newsletter distributed Annual questionnaire due for return to History Trust History Trust Board makes its grant recommendations, which are then sent to the Minister for approval
November - December	Minister approves grant recommendations
December	Newsletter distributed Applicants informed of outcome of grant application
January – March	Museums send grant invoices to History Trust for processing
January - April	Distribution of grant cheques

****These dates may change***

Current CMP museums

A list of current CMP museums and their contact details is available on the History Trust website:

www.history.sa.gov.au

History Trust's annual CMP grants program

The History Trust has an annual allocation of grant funds to distribute to CMP museums. The amount currently available for distribution is \$150,000 pa.

The grant round opens each year on 1 June and closes on 31 August, unless otherwise advertised.

These grants assist CMP museums to:

- maintain the required standards
- present, improve and change displays
- manage and care for collections

The History Trust encourages CMP museums to apply for funds for specific projects in their museums. Viewed over the long term, the grant fund supports museums to continuously improve programs and operations, in line with the CMP standards and requirements.

Guidelines, acquittal requirements and an application form are sent to CMP museums each year, prior to the opening of the grant round in June.

This grant information is also available on the History Trust's website, www.history.sa.gov.au. A list of recipients from the previous financial year is also available on the website.

Other funding programs

The History Trust encourages registered and accredited museums to apply to other grant programs for funding assistance.

Other relevant grant fund providers include:

- Arts SA
- Country Arts SA
- Department of Veterans' Affairs
- National Library of Australia
- Office for Volunteers
- South Australian Tourism Commission

For information on South Australian funding sources:

Australian Parliamentary Library: www.aph.gov.au

Service SA Grants Directory: www.service.sa.gov.au

South Australian Grants Register: www.southaustralia.biz

Community Grants: www2.familiesandcommunities.sa.gov.au

For information on Commonwealth Government funding sources: www.grantslink.gov.au

Advice, assistance and skills development opportunities

The History Trust offers CMP museums the following support and services:

- Advice on grants and administration of the annual grant fund
- Advice and assistance, through phone calls, newsletters, emails and field visits; in particular for collection, archival, conservation, and interpretive projects including displays and guided tours
- Skills development workshops on many aspects of museum operations, interpretive programs and collections management
- Referrals to other professional assistance, including museum consultants, conservators, historians, cataloguers and designers
- Guidance on sources for history research, interpretive projects and museum management, through the History Trust's library and resource centre

Skills development

Working in museums requires special skills.

The History Trust offers a range of skills development workshops.

These workshops:

- can be delivered to individual museums or to a regional grouping
- can be tailored to suit individual museum circumstances
- are generally offered free of charge

The History Trust conducts many of its skills development workshops with other agencies, such as Artlab Australia and the National Trust of South Australia.

Skills development programs include:

- Strategic planning for museums
- Working in museums: an overview
- Writing policies and procedures
- Cataloguing and collection records management
- Significance assessment of collections
- Caring for collections (preventive conservation), including:
 - Risk assessment and risk management
 - Storage and handling
 - Cleaning
 - Display techniques and supports
 - Disaster preparedness and response
- Managing community archives
- Planning display and interpretive projects
- Writing for displays and interpretive projects
- About the Community Museums Program

3: Using this Handbook

This Handbook is the essential manual for the History Trust's Community Museums Program (CMP).

The Handbook:

- explains the scope of the Community Museums Program (CMP)
- outlines the relationship between the History Trust of South Australia and the network of community-based museums already in, or seeking to join, the Community Museums Program
- explains the relationship between the CMP and the National Standards for Australian Museums and Galleries (2008)
- sets out the national standards that the CMP follows, and explains specific History Trust requirements for CMP museums
- offers advice on how to understand and implement the standards and meet the specific History Trust requirements
- lists essential resources

The Handbook is intended as a ready reference for museum management committees and workers. The word 'workers' refers to both volunteers and paid staff.

Museums are required to keep the Handbook in an easily accessible place in the museum's work area.

The Handbook should be used in conjunction with other museum management resources.

This Handbook (November 2008) replaces the previous manual, *Handbook for Registered and Accredited Museums* (November 2003).

4: What is a museum?

- A museum helps people understand the world by using objects and ideas to interpret the past and present and explore the future.
- A museum preserves and researches collections, and makes objects and information accessible in actual and virtual environments.
- Museums are established in the public interest as permanent, not-for-profit organisations that contribute long-term value to communities.

Museums Australia Inc 2002

Museums Australia recognises that museums of science, history and art may be designated by many other names, including galleries and keeping places.

In addition, the following may qualify as museums for the purposes of the above definition:

- (a) natural, archaeological and ethnographic monuments and sites and historical monuments and sites of a museum nature that acquire, conserve and communicate material evidence of people and their environment;
- (b) institutions holding collections of and displaying specimens of plants and animals, such as botanical and zoological gardens, herbaria, aquaria and vivaria;
- (c) science centres;
- (d) cultural centres and other entities that facilitate the preservation, continuation and management of tangible or intangible heritage resources (living heritage and digital creative activity);
- (e) such other institutions as the Museums Australia National Council consider as having some or all of the characteristics of a museum

5: National Standards for Australian Museums and Galleries: Principles and Standards

Part A: Managing the Museum

Principle A1 **The museum has a sound legal and management framework that follows recognised museum ethics and protocols.**

Supporting Standards

- The museum is properly constituted.
- The museum has a governing or managing body that takes overall responsibility for the museum.
- The museum maintains contact with relevant peak bodies and networks.
- The museum operates in accordance with a recognised code of museum ethics.
- The museum abides by international, national and state/territory protocols relating to museum practice, moveable heritage, heritage places and fabric.
- The museum complies with Australian federal, state/territory and local laws, by-laws and regulations.

Principle A2 **The museum is effectively managed, sustainable and publicly accountable.**

Supporting Standards

- The museum has a written Statement of Purpose.
- The museum works to formal, written policies and procedures that cover its management, responsibilities, programs and services, and reflect its Statement of Purpose.
- The museum has a viable, current Forward Plan that covers all aspects of museum operations.
- The museum uses an effective information and records management system.
- The museum uses sound financial management and reporting practices and procedures, and is financially viable.
- The museum identifies and assesses risks and has strategies in place to manage them.

Part A: Managing the Museum (continued)

Principle A3 **The museum manages its workers to make the best use of their skills and knowledge, and to achieve the museum's purpose.**

Supporting Standards

- The museum defines its key roles and tasks, and recruits and appoints suitable people for specific roles.
- The museum defines and communicates the duties, rights and responsibilities of the museum and its workers.
- The museum acknowledges that museum work involves special skills, and gives workers opportunities to acquire or enhance these skills.

Principle A4 **The museum is a secure, well-managed facility that presents a positive public image.**

Supporting Standards

- The museum has security of tenure for its premises.
- The museum dedicates appropriate spaces to all activities.
- The museum conserves, maintains, protects and documents its assets.

PART B: Involving People

Principle B1 The museum is used, supported and valued by diverse communities as a worthwhile place where people can express, share and discover significant stories, ideas and objects.

Supporting Standards

- The museum includes a range of people in its operations and programs.
- The museum carries out its activities as part of a broader community and contributes to community events.

Principle B2 The museum presents its most significant collection items, stories and themes through engaging exhibitions and programs.

Supporting Standards

- The museum selects significant collection areas, stories or themes to highlight, based on what is most relevant to its purpose and audiences.
- The museum's exhibitions, activities and events are based on sound research and current museological practices.
- The museum's exhibitions, activities and events actively encourage lifelong learning.

Principle B3 The museum is committed to its current and potential audiences, and caters for their needs and interests through its communications, programs and services.

Supporting Standards

- The museum knows who its current and potential audiences are and has strategies to attract and retain them.
- The museum promotes its collection, key attractions, programs and services.
- The museum provides information to help visitors locate the museum and find their way around while they are there.
- The museum has regular opening hours.
- The museum offers visitors a welcoming experience, and its workers respond appropriately to visitor enquiries and feedback.
- The museum's public programs are as accessible as possible to people of all ages and abilities.

Part C: Developing a Significant Collection

Principle C1 **The museum's collection represents the significant stories and interests of its diverse and changing communities.**

Supporting Standards

- The museum develops its collection to reflect its unique purpose and the significant stories and interests of its diverse and changing communities.
- The museum knows the significance of its collection.
- The museum aims to have unconditional legal ownership of its collection.
- The museum has an effective system to record and retrieve information about its collection.
- The museum makes its collection accessible in digital formats and in online environments, as resources permit.

Principle C2 **The museum preserves its significant collections for future generations.**

Supporting Standards

- The museum makes decisions on preventive conservation based on current conservation advice and practices.
- The museum actively strives to create and maintain an appropriate and stable environment for its collection.
- The museum's display, storage and handling methods minimise risks to its collection.
- The museum makes decisions about conservation treatments based on current conservation advice and practices.
- The museum has identified, and is able to respond to, all potential threats to its collection.

6: Requirements for CMP registration and accreditation

Guiding framework:

National Standards for Australian Museums and Galleries

The CMP requirements follow exactly the National Standards for Australian Museums and Galleries (2008), which were developed by the National Standards Taskforce between 2006 and 2008.

The vision of a viable and sustainable museum sector for Australia is encompassed in these standards.

The National Standards official online version

The full National Standards document is freely available online to all collecting organisations across Australia, through the Collections Australia Network,

http://www.collectionsaustralia.net/sector_info_item/107

The National Standards document is also available through the History Trust's website,

www.history.sa.gov.au

Structure of the CMP Handbook

The CMP Handbook follows the structure of the National Standards for Australian Museums and Galleries.

The CMP requirements are therefore structured in three parts:

- **Part A: Managing the Museum**
- **Part B: Involving People**
- **Part C: Developing a Significant Collection**

These three parts encompass:

- **Principles (National Standards)**
- **Standards (National Standards)**
- **Benchmarks (National Standards)**
- **CMP Evidence (for CMP registration and accreditation)**
- **Tips (relevant to CMP and South Australia)**
- **Resources (relevant to CMP and South Australia)**
- **Consolidated checklists (for CMP registration and accreditation)**

The National Standards

There are nine **Principles**, which encompass core museum philosophy and practices.

There are thirty-nine **Standards**, which outline the criteria to be met as museums put the principles into action.

The **Benchmarks** are points of reference to assist museums wishing to demonstrate that they are working towards meeting specific standards.

Tips are practical pointers and suggestions relating to specific benchmarks.

Resources are books, online publications and websites relevant to the museum activities encompassed by individual benchmarks.

How does the CMP Handbook differ from the National Standards document?

The CMP Handbook uses the Principles, Standards and Benchmarks from the National Standards without alteration.

In addition, the Handbook lists the evidence required for registration and/or accreditation in the Community Museums Program.

Museums should take note of all of the benchmarks outlined in the National Standards. The Community Museums Program, however, does not necessarily require evidence for all of the benchmarks, especially from museums seeking entry into the Program at registration level. In some cases, accredited museums are required to meet some benchmarks that registered museums are not, in order to demonstrate a higher level of operation.

The National Standards Tips and Resources sections have been edited by the History Trust for the CMP Handbook, so that they relate directly to South Australia, the CMP requirements and to South Australian community-based history museums.

National Standards Tips and Resources relevant to art galleries have been omitted from the CMP Handbook as art galleries are generally ineligible to join the Community Museums Program.

There are extensive Appendices in the National Standards online document, including a glossary of terms.

The CMP Handbook also contains consolidated checklists of evidence required for CMP registration and accreditation.

Resources

There are many books, online publications and websites that cover various aspects of museum management and operations. Many of the books and other published reference materials are also available online.

A full listing of these resources is in the online version of the National Standards, on the Collections Australia Network website, www.collectionsaustralia.net.au. This online version has handy, direct hyperlinks to most of these resources.

The History Trust has included only a selection of the available resources in the CMP Handbook. The History Trust holds copies of the books listed in the Handbook, and has downloaded and printed a copy of the online publications that are also listed. These resources are available for reference at the History Trust's head office in Adelaide, but are generally not available for loan.

In the CMP Handbook the History Trust has listed only the main web address for online publications. To find the actual resource, click onto Resources, Sector Info or Publications.

Of particular relevance are the following resources:

- Museums Australia, *Museum Methods: a practical manual for managing museums*, 2002
- Heritage Collections Council, *reCollections*, 1998 (now available online at www.collectionsaustralia.net.au)
- Collections Australia Network, www.collectionsaustralia.net.au. This immensely valuable website is constantly updated with new advice and resources. Go to Sector Info.



CMP Help Sheets

The History Trust provides further information and assistance in a designated section for the Community Museums Program on the History Trust website, www.history.sa.gov.au.

These **CMP Help Sheets** include templates, policy models, advice, hints and links to other useful websites. These additional resources will be added to and amended as required over time.

Explanation of symbols and abbreviations

The following symbols and abbreviations are used extensively in the following sections of the Handbook:

R & A	Required for both CMP registration and accreditation
A	Required for CMP accreditation only
R	Required for CMP registration only
	Required written evidence
	To be assessed on the museum site by History Trust staff

Part A: Managing the Museum

Principle A1: The museum has a sound legal and management framework that follows recognised museum ethics and protocols.

Standard A1.1

The museum is properly constituted.

Benchmarks

- A1.1.1 The museum operates within an appropriate legal framework.
- A1.1.2 The body responsible for the governance of the museum is a legally constituted entity.
- A1.1.3 There is a 'wind-up clause' outlining procedures should the museum be 'wound-up' or dissolved.
- A1.1.4 The 'wind-up clause' states that the collection would be disposed of according to recognised museum ethics.

CMP Evidence

R & A Copy of certificate of incorporation, or other legal framework



R & A Copy of museum's constitution, or other guiding document



R & A 'Wind-up clause' in constitution or other guiding document



Standard A1.1: Tips & Resources

A properly constituted museum

A properly constituted museum can:

- have its own constitution, or
- be part of a properly constituted body, such as an incorporated association, a company or a government agency (which may then provide Terms of Reference for a museum committee or appointed manager)
- be constituted by an act of parliament

Incorporation Acts exist in each Australian state and territory to set the legal framework for incorporated organisations. In South Australia, the relevant Act is the *Associations Incorporation Act 1985*.

Many South Australian community museums are independently incorporated organisations. Some are managed under Section 41 of the *Local Government Act 1999*. Others are branches of the National Trust, which was established by an act of parliament.

The constitution as a guiding document

The museum's constitution, or other guiding document such as a Terms of Reference, is an important document. It guides the roles, functions and responsibilities of the museum's governing body and/or management committees, or appointed manager.

It should be available for ongoing ready reference, be reviewed regularly and be included in induction processes, especially for new members of the museum's governing or managing body.

The governing entity and collections

The governing entity is normally the legal owner of the collections.

'Wind-up clause'

Incorporation Acts require an organisation's constitution to include 'wind up' procedures.

Museums should make an important distinction between assets, such as property, equipment, fixtures and fittings, and the collection, which should not be disposed of in the same way as other assets. The Museums Australia *Code of Ethics* (1999) requires museums to make provision in their constitution 'for the disposal of property and collections to properly constituted organisations with similar aims'. Depending on the museum's legal framework, this 'wind-up clause' may be in the museum's Terms of Reference or Collection Policy.

Museums registered as Deductible Gift Recipients with the Australian Taxation Office must include specific wording to define their 'wind-up' procedures in their constitution.

Standard A1.1: Tips & Resources (continued)

Books and online publications

N E Renton, *Guide for Meetings and Organisations*, vol 1: *Guide for Voluntary Associations*, 7th edition, LBC Information Services, Sydney, 2000

Kate Reynolds, *Just A Tick: A Best Practice Guide for Committees and Boards of Management*, Volunteering SA, Adelaide, 1999, revised edition 2002

Museums Australia, *Code of Ethics for Art, History and Science Museums* (1999), at www.museumsaustralia.org.au

Websites

Information on the *Associations Incorporation Act 1985* and the *National Trust of South Australia Act 1955*

www.legislation.sa.gov.au

Information on local councils

www.legislation.sa.gov.au

Online library on museum management and governance, Simpsons Solicitors, Sydney

www.simpsons.com.au/






Standard A1.2

The museum has a governing or managing body that takes overall responsibility for the museum.

Benchmarks

- A1.2.1 The museum's guiding document defines the roles of the governing body and its office-bearers.
- A1.2.2 The governing body ensures that the roles and responsibilities associated with running the museum are clearly defined and allocated.
- A1.2.3 The governing body meets regularly, works to a formal agenda, and records minutes of its meetings.

CMP Evidence

R & A	Description summarising the functions and activities of the museum	
R & A	List of designated roles and responsibilities for the museum's governing body or management committee	
R & A	List of designated roles and responsibilities to ensure that all museum tasks are well-managed	
R & A	Copy of meeting agenda template	
R & A	Minutes of meetings over last financial year	

Standard A1.2: Tips & Resources

The organisation's functions and activities

This comprehensive description should refer to the museum's varied functions and activities, which may include:

- operating a museum and managing a museum site
- doing displays
- developing a collection
- running events and community and school activities
- responding to public enquiries and managing a research centre/service
- fundraising and earning income (e.g. from a rental property)
- organising an annual program of speakers/events
- commercial hire of museum site

Key responsibilities of the governing body or management committee

Roles are often defined in the museum's constitution or other guiding document and may include the roles of President, Vice-President, Secretary, Minute Secretary and Treasurer.

Some of the key responsibilities of a museum's governing or managing body may include:

- Having publicly transparent and accountable procedures for appointing members to governing boards and/or management committees
- Defining roles and responsibilities for the governing or managing body and its office-bearers
- Defining the staffing structure (paid and/or voluntary) and associated key roles and tasks required to manage the museum effectively
- Ensuring that the governing or managing body
 - meets regularly
 - works to a formal agenda
 - records, validates and protects minutes of meetings (especially decisions made)
 - holds, or reports to, an annual general meeting (where required)
 - provides or contributes to a written annual report
 - manages finances appropriately, including keeping accurate financial records and having these records audited, or independently checked, annually
 - complies with Australian Taxation Office requirements.

Standard A1.2: Tips & Resources (continued)

Roles and responsibilities for museum tasks

Roles and responsibilities to ensure that the museum is well-managed might include:

- director or manager, with delegated authority from the museum's governing body
- curator/curatorial team, who look after the collection
- display coordinator/team, who develop the museum's displays and other interpretive programs
- OHS&W officer/team, who take responsibility for worker and visitor safety
- marketing officer/team, who oversee publicity and promotion
- grants officer/team, who take responsibility for sourcing, applying for and acquitting grants
- guides, who give tours and present special programs
- events coordinator/team
- research coordinator/team, who do research, answer public enquiries and organise the research files, books and other resources

Resources

There are many good resources readily available to assist governing or management bodies of museums to establish and maintain best practice in fulfilling their legal and ethical responsibilities.

Induction

An induction process helps new members of the governing body learn about their responsibilities.

Books and online publications

Museums Australia, *Museum Methods: a practical manual for managing museums*, 2002

David Fishel, *The Book of the Board: Effective Governance for Non-profit Organisations*, The Federation Press, 2nd edition 2008

N E Renton, *Guide for Meetings and Organisations*, vol 1: *Guide for Voluntary Associations*, 7th edition, LBC Information Services, Sydney, 2000

N E Renton, *Guide for Meetings and Organisations*, vol 2: *Guide for Meetings*, 7th edition, LBC Information Services, Sydney, 2000

Kate Reynolds, *Just A Tick: A Best Practice Guide for Committees and Boards of Management*, Volunteering SA, Adelaide, 1999, revised edition 2002

Museums Australia *Code of Ethics* (1999), at www.museumsaustralia.org.au

Websites

Website designed for community groups

www.ourcommunity.com.au

Online library on museum management and governance, Simpsons Solicitors, Sydney

www.simpsons.com.au


Standard A1.3


The museum maintains contact with relevant peak bodies and networks.

Benchmarks

A1.3.1 The museum subscribes to, or keeps in touch with, relevant professional associations and networks.

CMP Evidence

R & A List of organisations to which the museum belongs, or has close association with 

A Membership of Museums Australia 

Standard A1.3: Tips & Resources

Relevant national peak bodies and networks for South Australian community museums

National peak bodies include:

- Museums Australia (MA)
- Collections Council of Australia (CCA)
- Collections Australia Network (CAN)
- Australian Institute for Conservation of Cultural Material (AICCM)
- Federation of Australian Historical Societies (FAHS)
- Australian Council of National Trusts

CMP accredited museums are required to take out membership of Museums Australia, which is the peak professional body for museums and museum workers in Australia.

Some South Australian museums are also members of relevant international associations.

Relevant state peak bodies and networks for South Australian community museums

State peak bodies include:

- History Trust of South Australia
- Museums Australia (SA branch)
- History Council of South Australia
- Historical Society of South Australia
- National Trust of South Australia
- Council of Historic Railways & Tramways of South Australia (CHRTSA)

Websites

Museums Australia	www.museumsaustralia.org.au
Collections Council of Australia	www.collectionscouncil.com.au
Collections Australia Network	www.collectionsaustralia.net.au
Australian Institute for Conservation of Cultural Material	www.aiccm.org.au
Federation of Australian Historical Societies	www.history.org.au
Australian Council of National Trusts	www.nationaltrust.org.au
History Trust of South Australia	www.history.sa.gov.au
Museums Australia, SA Branch	www.museumsaustralia.org.au/site/sa.php
History Council of South Australia	www.historycouncilsa.org.au
Historical Society of South Australia	www.hssa.org.au/
National Trust of South Australia	www.nationaltrustsa.org.au/
Association of Tourist & Heritage Rail Australia	www.athra.asn.au/

Standard A1.4





The museum operates in accordance with a recognised code of museum ethics.

Benchmarks

- A1.4.1 The governing body formally adopts for the museum either the Museums Australia or the ICOM code of museum ethics.*
- A1.4.2 The code of ethics is referred to and followed by the governing body and by all museum workers.
- A1.4.3 The governing body and all workers have easy access to the code of ethics, which is also included in workers' induction and training materials.

*For CMP museums, the preferred code is the Museums Australia Code of Ethics.

CMP Evidence

R & A	Copy of minutes of meeting at which the governing body or management committee formally adopted the Museums Australia Code of Ethics	
R & A	Copy of the Code of Ethics readily available for reference by the museum's governing or managing body, and workers (current and new)	
A	Forms signed by all relevant workers, stating that they have read and agree to abide by the Code of Ethics	
A	Explanation of how the museum demonstrates a clear commitment to the Code of Ethics in relation to caring for its collection	

Standard A1.4: Tips & Resources

Adopting the Code of Ethics

Museums registered and accredited in the Community Museums Program (CMP) are asked to adopt and abide by the Museums Australia *Code of Ethics*.

Where a CMP museum is part of a larger umbrella organisation, such as a local council, only the museum's direct managing body and workers are expected to be familiar with the Code of Ethics.

The National Trust of South Australia also requires its branches to abide by its code of ethics.

Using Codes of Ethics

The Museums Australia and ICOM (International Council of Museums) codes of ethics are fundamental and essential documents to assist governing or managing bodies, and all museum workers, to understand the particular ethical issues and responsibilities involved in looking after significant sites and collections.

The statements in the codes are a useful checklist against which a museum can review and update its current policies and practices. There are guidelines on:

- acquiring, borrowing and lending, and displaying collections
- the responsibilities involved in preserving and conserving collections, and managing any restoration projects in ways that maintain the object's authenticity and integrity, and minimise damage and deterioration
- disposing of objects and collections appropriately
- community consultation, including consulting with Indigenous and culturally and socially diverse groups on how their stories and objects are collected and presented in displays and public programs
- worker responsibilities and employment
- conflict of interest

Making information available

Museums can make information on the adopted code of ethics available to all committee members and workers through means such as a staff information folder, or induction manual, or some other appropriate process. A simple Lever Arch file or other folder is ideal; alternatively, some museums might prefer to circulate electronic copies.

Caring for collections in accredited museums

Accredited museums can demonstrate their commitment to the Code of Ethics through:

- written conservation treatment plans, which are approved by the museum's management committee, prior to conducting any interventive work on objects, such as restoration work
- written significance assessments on key collection items

Standard A1.4: Tips & Resources (continued)

Books and online publications

Museums Australia, *Museum Methods*, 2002

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Code of Ethics (Museums Australia): a summary*

Museums Australia, *Code of Ethics for Art, History and Science Museums* (1999), at www.museumsaustralia.org.au

International Council of Museums, *ICOM Code of Ethics for Museums*, 2006, at www.icom.museum




Standard A1.5

The museum abides by international, national and state/territory protocols relating to museum practice, moveable heritage, and heritage places and fabric.

Benchmarks

- A1.5.1** All museum policies, procedures and programs are developed and carried out with reference to relevant, current protocols.
- A1.5.2** Workers are given appropriate information to assist them in understanding, and working with regard for, protocols relevant to Indigenous arts and cultures, and other relevant protocols.

CMP Evidence

R & A	Copies of relevant protocols available for the museum's governing or managing body, and all museum workers	
R & A	Museum's acknowledgement of the Indigenous owners and custodians of the land on which the museum is sited	
A	Forms signed by all relevant workers, stating they have read and agree to abide by the museum's protocols	

Standard A1.5: Tips & Resources

Indigenous protocols and acknowledging Indigenous owners and custodians

The History Trust encourages CMP museums to find ways of implementing the principles and recommendations of Museums Australia's *Continuous Cultures: Ongoing Responsibilities*.

Where relevant, museums are encouraged to work with local Indigenous people and involve them in their programs and activities. Museums are ideally placed to work with Indigenous people and organisations to explore past and present relationships between Indigenous and non-Indigenous people.

Museums should consult with Indigenous communities or organisations before stories, objects or pictorial material relating to Indigenous people are collected, copied or displayed. Local Indigenous communities have a right to know what Indigenous items, including objects and photographs, might be held in their local museum. It is important that they determine who has access to such items and if and how these items may be displayed.

As a first step, CMP museums are required to acknowledge the Indigenous owners and custodians of the land on which the museum is sited.

This acknowledgement may be in the form of a notice in the visitor orientation area, other appropriate space, or on the museum's website.

This notice may have wording, such as:

The (museum) acknowledges the (Indigenous group) as the traditional owners and custodians of the lands of (district, town, suburb, site). We honour and respect their ongoing cultural and spiritual connections to this country. We aim to respect the cultural heritage, customs and beliefs of all Indigenous people.

If relevant, museums can work with local Indigenous people on the wording of this acknowledgement. Alternatively, the museum may decide to install a display in collaboration with local Indigenous groups. Or a museum may invite local Indigenous groups to provide their own 'Welcome to Country' statement.

Museums may have photographs of Indigenous people on display or stored in hard copy or digital format. Common practice in museums and libraries is to have a 'cultural sensitivity warning' alerting Indigenous visitors, researchers and viewers to the fact that the display or collection contains images of Indigenous people who may be deceased. This message helps to avoid causing offence to Indigenous people.

Standard A1.5: Tips & Resources (continued)

Other relevant protocols

There are relevant protocols relating to:

- museum practice
- moveable heritage
- heritage places and fabric
- indigenous arts and cultures
- the return of cultural objects

The following codes and protocols are relevant:

AICCM Code of Ethics and Code of Practice, on the care and management of moveable heritage, such as historical collections

Australia ICOMOS Burra Charter, on the care and management of heritage places, buildings, sites and fabric

Museum's Australia Indigenous protocols, as set out in *Continuous Cultures: Ongoing Responsibilities*, which guides museum practice in the representation of Indigenous people in museums, and the return of human remains and cultural artefacts

Museums Australia's Cultural Diversity Policy, which guides museum practice in the representation and inclusion of cultural and social diversity in museums

AICCM is the Australian Institute for the Conservation of Cultural Material Inc and is 'the national organisation for conservators and people interested in the preservation of cultural material'. Australia ICOMOS is a branch of ICOMOS, which is 'an international non-government organisation of professionals dedicated to the conservation of the world's historic monuments and sites'.

Other Museums Australia policies

Museums Australia has also developed the following policies:

- women's policy
- gay and lesbian policy
- museums and sustainability

Making protocols available

Copies of protocols can be included in a staff information folder (hard copy or electronic), in induction materials or through some other suitable means.

Standard A1.5: Tips & Resources (continued)

Books and online publications

Museums Australia, *Museum Methods*, 2002

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Indigenous acknowledgement: examples*
- *Cultural sensitivity warning: examples*
- *Protocols for museums: a summary*

Australia ICOMOS *Burra Charter*, 1999, at www.icomos.org/australia

AICCM *Code of Ethics and Code of Practice*, 2005 at www.aiccm.org.au

Department of the Environment, Water, Heritage and the Arts, *The Protection of Australia's Movable Cultural Heritage Act 1986*, at www.environment.gov.au/

Australia Council guides to producing Indigenous Australian performing arts, music, visual arts, writing and media arts, at www.australiacouncil.gov.au

Websites

Museums Australia

www.museumsaustralia.org.au

International Council of Museums

www.icom.museum

Aboriginal and Torres Strait Islander Library and Information Resource Network (ATSILIRN) Protocols

www.aiatsis.gov.au

Standard A1.6

The museum complies with Australian federal, state/territory and local laws, by-laws and regulations.

Benchmarks

A1.6.1 The museum's policies and procedures show an awareness of the laws and regulations that apply to its collection, site, management and programs.

CMP Evidence

There is no evidence required for A1.6.

The History Trust will not monitor whether or not CMP museums comply with Australian laws, by-laws and regulations.

Although CMP museums are not required to present evidence of compliance to the History Trust, this does not absolve museums from meeting their legal obligations and keeping up to date with current legislation.

Standard A1.6: Tips & Resources

Laws and regulations which may be relevant to museum activities

Laws and regulations may vary from state to state, while different by-laws may apply in different local government jurisdictions. In the museum context, areas of activity that have legal implications include:

- advertising and publishing (in addition to copyright, legal issues could include moral rights, or defamation)
- building works
- classification of content of exhibitions and other programs
- financial management
- firearms
- food and liquor sales and/or service
- handling/working with dangerous goods, hazardous materials or firearms
- insurance
- managing heritage buildings and fabric
- managing staff
- managing volunteers
- market research
- occupational health, safety and welfare (OHS&W)
- operation of steam boilers and pressure vessels
- operation of vehicles, including forklifts
- protection of built and moveable cultural heritage
- records management
- urban planning
- working with children

Laws and legal principles in the following areas can also have relevance for museums:

- equal employment opportunity
- freedom of information
- intellectual property
- privacy
- public liability
- racial vilification
- sedition
- universal access

Books and online publications

Australian Copyright Council, *Galleries and Museums; an introduction to copyright*, 2006

Australian Government, Office of the Privacy Commissioner, *National Privacy Principles* (2008)

Beth M Robertson, *Oral History Handbook*, 5th edition, Oral History Association of Australia (South Australian Branch) 2006

Standard A1.6: Tips & Resources (continued)

Museums Australia, *Museum Methods*, 2002

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Privacy statement: examples*

Websites: general

Collections Australia Network (especially Sector Info)

www.collectionsaustralia.net.au

Arts Law Centre of Australia

www.artslaw.com.au

Simpson Solicitors, Sydney

www.simpsons.com.au/

Websites: specific

Copyright

Australian Copyright Council

www.copyright.org.au

Equal opportunity and racial vilification

Equal Opportunity Commission which administers the South Australian *Equal Opportunity Act 1984* which covers disability, race, age, sex, sexuality, marital status and pregnancy and the *Racial Vilification Act 1996*

www.eoc.sa.gov.au

Firearms

South Australian Police administers the Firearms Act and Regulations and the Weapons Legislation. Contact the Firearms Branch or your local police station

www.sapol.sa.gov.au

Food

South Australian Department of Health administers the Food Act 2001 and Food Regulations 2002

www.health.sa.gov.au

Freedom of Information

State Records of South Australia administers Freedom of Information legislation in South Australia

www.archives.sa.gov.au

Liquor

Office of the Liquor & Gambling Commissioner administers the Liquor Licensing Act

www.olgc.sa.gov.au

OHS&W

Safework SA provides information on the South Australian Occupational, Health, Safety and Welfare Acts and Regulations

www.safework.sa.gov.au

Privacy

Office of the Privacy Commissioner

www.privacy.gov.au

Protection of movable cultural heritage

Department for the Environment, Water, Heritage and the Arts administers the *Protection of Movable Cultural Heritage Act 1986* which protects Australia's significant cultural heritage objects from export

www.environment.gov.au

Part A: Managing the Museum

Principle A2: The museum is effectively managed, sustainable and publicly accountable.

Standard A2.1

The museum has a written Statement of Purpose.

Benchmarks

A2.1.1 The Statement of Purpose outlines the museum's

- focus, scope or speciality
- underlying philosophy
- core functions
- physical area
- communities
- audiences

CMP Evidence

R & A

Copy of museum's Statement of Purpose



Standard A2.1: Tips & Resources

Statement of Purpose

The museum's Statement of Purpose outlines the reason why the museum exists, what it does and for whom.

For CMP museums, it is important that the Statement of Purpose sets out the particular aspects of South Australia's history that the museum aims to preserve and present.

This Statement guides the museum's goals, strategies, policies, programs and services.

Guide to defining the purpose of museums

The Statement of Purpose should be guided by the concepts embodied in the Museums Australia definition of a museum (2002):

A museum helps people understand the world by using objects and ideas to interpret the past and present and explore the future. A museum preserves and researches collections, and makes objects and information accessible in actual and virtual environments. Museums are established in the public interest as permanent, not-for-profit organisations that contribute long-term value to communities.

Books and online publications

Heritage Collections Council, *reCollections*, 1998

Jennifer Colbert, *Strategic Planning Manual*, Museums Australia, 1998

Museums Australia, *Caring for Our Culture: National Guidelines for museums, galleries and keeping places*, 1998

Museums Australia, *Museum Methods*, 2002

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Statement of purpose: examples*

Websites

Museums Australia

www.museumsaustralia.org.au

Collections Australia Network online *reCollections*

www.collectionsaustralia.net.au






Standard A2.2

The museum works to formal, written policies and procedures that cover its management, responsibilities, programs and services, and reflect its Statement of Purpose.

Benchmarks

- A2.2.1 The museum's governing body adopts relevant written policies and procedures for the museum.
- A2.2.2 The governing body and museum workers have copies of relevant current policies and procedures.
- A2.2.3 Relevant museum policies and procedures are made public.
- A2.2.4 Policies and procedures are reviewed regularly, and updated as required.

CMP Evidence

R & A	Copy of museum's current policies and procedures	
R & A	Copy of meeting minutes where policies and procedures were formally adopted	
R & A	Policies and procedures available for the museum's governing body or management committee, workers, and public (where relevant)	
A	Records showing that policies and procedures have been reviewed and updated in last 1-3 years	
A	Forms signed by all relevant workers, stating that they have read and agree to abide by the museum's policies and procedures	

Standard A2.2: Tips & Resources

Written policies and procedures

Written policies and procedures will help museums to:

- undertake tasks in a coordinated and consistent way
- ensure that workers undertake tasks in appropriate ways
- ensure a smooth succession from committee to committee

Policies and procedures reflect other guiding documents

Policies and procedures are an essential part of the museum's guiding documents. Other guiding documents include the museum's Constitution or Terms of Reference, Statement of Purpose, Forward Plan and Code of Ethics.

Other external guiding documents might also include a local government cultural development plan or a state government forward plan or cultural heritage policy.

Required policies and procedures

Museums will vary in the policies and procedures they need to have, according to the scope of their operations and programs.

Policies and procedures common to all museums, however, relate to the development, management and care of the museum collection, to interpretation and museum workers, visitors and users.

All CMP museums, therefore, and whether registered or accredited, are required to have **three key written policies**:

1. Collection Policy, consisting of the following sections:

- **acquisition**, including collection aim, collecting areas, collecting criteria and collecting process
- **cataloguing** (documentation) procedure, including management of collection records and databases, and management of non-core collection items
- **outward and inward loans**
- **de-accessioning** guidelines and **disposal** procedures
- **preventive conservation strategy**, including managing the museum environment, preserving items on display and in storage, cleaning and handling, and pest management
- **collection access**

For information about writing a Collection Policy, see C1.1

Standard A2.2: Tips & Resources (continued)

2. Interpretation Policy, consisting of:

- **key stories, topics, themes/ideas** that the museum presents through displays and other interpretive programs, such as guided tours, education programs, handouts or brochures, and web-based programs
- **methods and approaches** used to research, develop, design and present displays and other interpretive programs

For information about writing an Interpretation Policy, see B2.1

3. Visitor Services Policy, consisting of:

- management of tours and bookings, including cancellation procedures
- marketing and promotion
- managing enquiries and requests for access to the collection and research files
- visitor orientation, opening and closing hours, recording visitor numbers and visitor types
- museum security procedures
- visitor facilities and safety
- visitor access
- sale of merchandise and other financial transactions
- management of events
- key information about the museum, its policies, programs and services
- recording and reporting accidents and incidents
- emergency and evacuation procedures
- responding to visitor complaints

For information about writing a Visitors Services Policy, see also B3.5

Workers Policy

A fourth key policy for museums is a **Workers Policy**, consisting of:

- induction procedures
- rights and responsibilities of volunteers (volunteer guidelines)
- conditions of employment for paid workers (where relevant)
- OHS&W guidelines

See also A2.6, A3.1, A3.2 and A3.3

For CMP registration and accreditation, museums are only required to have two parts of this Workers Policy. These are the induction procedures and volunteer guidelines.

Standard A2.2: Tips & Resources (continued)

For CMP registration and accreditation, the History Trust does not monitor a museum's compliance with OHS&W legislation, or require to see its written conditions of employment for paid staff (if relevant).

Digitisation guidelines

Where relevant, the museum should also develop **guidelines for digitisation** projects. Refer to C1.5.

Additional useful documents and policies

Depending on the nature of the museum, the following policies and procedures may also be relevant, but they are not required for registration or accreditation in the Community Museums Program:

- access policy, e.g. for people with disabilities and special needs
- commercial activities policy
- conflict of interest policy
- contractors and artists policy
- education and lifelong learning policy
- fraud policy
- fundraising and sponsorship policy
- information management policy (for record-keeping)
- sustainability policy
- whistleblower policy
- working with children policy

Policies and procedures in the National Standards document

There are references to policies and procedures throughout the National Standards document.

These references include:

- A1.5: to assist in applying museum protocols
- A1.6: to assist in complying with federal, state and local laws, by-laws and regulations
- A2.6: to assist in managing risks, including OHS&W guidelines
- A4.3: to protect the museum's assets and consider the sustainability of natural resources
- B2.1: for the interpretation and presentation of the museum's collections, themes and stories
- C1.1: for the development and management of the collection
- C1.4: for the management of collection records
- C1.5: for digital collections
- C2.1: for the development of a preventive conservation strategy for the collection
- C2.5: for the development and implementation of a disaster preparedness and response plan for the collection

Standard A2.2: Tips & Resources (continued)

Dating and updating policies and procedures

Make sure that policies and procedures are dated on approval, and that updates are also dated. This is often referred to as document version control.

Policies and procedures should be reviewed regularly. It may help to do this according to a set timetable, e.g. annually or at least every 3-5 years.

Consultation

It may be appropriate to consult relevant stakeholders when policies or procedures are reviewed.

Making policies and procedures available to the public

Some policies and procedures, either whole or in part, should be available publicly, for members of the wider community, donors, stakeholders, visitors and other users.

The core museum policies and procedures to make public might include:

- Collection Policy
- Interpretation Policy
- Visitor Services Policy
- Volunteer guidelines (part of the Workers Policy)
- Forward Plan

And also, if relevant

- commercial activities policy
- contractors and artists policy
- education and lifelong learning policy
- fees and charges for enquiries and copying
- privacy statement
- research policy
- sustainability policy
- whistleblower policy
- working with children policy

Books and online publications

Museums Australia, *Museum Methods*, 2002

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Volunteer guidelines*
- *Visitor Services Policy*
- *Workers Policy*

Websites

Collections Australia Network (CAN)

www.collectionsaustralia.net.au

Standard A2.3

The museum has a viable, current Forward Plan that covers all aspects of museum operations.

Benchmarks

- A2.3.1 The Forward Plan reflects the museum's Statement of Purpose.
- A2.3.2 The Forward Plan is informed by the relevant policies and strategies of government and of other organisations.
- A2.3.3 The Forward Plan sets realistic time frames and identifies how and where the resources needed to achieve each goal will be obtained.
- A2.3.4 Museum activities clearly reflect the goals outlined in the Forward Plan.
- A2.3.5 The Forward Plan is reviewed regularly, and is revised if the museum's priorities and needs change.

CMP Evidence

R & A

Copy of museum's current Forward Plan



Standard A2.3: Tips & Resources

Naming a Forward Plan

A Forward Plan may also be known as a Strategic Plan, Business Plan, Corporate Plan or Operational Plan.

What is in a Forward Plan?

The Forward Plan should begin with the museum's Statement of Purpose and should be presented in a format that clearly sets out the following:

- goals for the short term (1 year) and for the longer term (e.g. 3-5 years)
- strategies to achieve these goals
- who is responsible
- resources/budget secured and/or required
- timeline and deadlines
- date for review

The Forward Plan should be updated regularly, preferably annually, and achievements noted.

A Forward Plan can also include a statement about the museum's strengths, weaknesses, opportunities and threats (also known as a SWOT analysis).

What does a Forward Plan cover?

The Forward Plan should cover all aspects of museum activities, and may include:

- managing and improving the museum site
- developing and managing the collection
- improving the care, storage and display of the collection (preventive conservation)
- developing and delivering the museum's interpretation and display program
- organising special events and activities
- staffing and skills development
- involving the community; audience development; partnerships; promotion and marketing

The standards and benchmarks in the National Standards can assist museums to identify gaps and areas for improvement.

Relating your Forward Plan to broader strategies

It may be appropriate to align the museum's Forward Plan with the strategies and policies of government and other organisations. For example:

- South Australia's Strategic Plan (SASP)
- *Creative Communities: guidelines for developing and maintaining an arts and cultural policy* (Local Government Association, South Australia)
- *South Australia Cultural Tourism Policy* (South Australian Tourism Commission 2008)
- State Tourism Plan (draft 2008)

Standard A2.3: Tips & Resources (continued)

Consultation and inclusion

It may also be useful to invite key community stakeholders to your forward planning day/meeting, such as representatives from local government, schools, economic, tourism or cultural development boards, and other history and heritage groups.

Books and online publications

Jennifer Colbert, *Strategic Planning Manual*, Museums Australia, 1998

Museums Australia, *Museum Methods*, 2002

South Australian Tourism Commission, *South Australia Cultural Tourism Policy*, 2008

South Australian Government, *South Australia's State Strategic Plan*, at www.stateplan.sa.gov.au

Local Government Association, *Creative Communities: guidelines for developing and maintaining an arts and cultural policy*, at www.lga.sa.gov.au

Websites

Online website for community groups

www.ourcommunity.com.au

Standard A2.4

The museum uses an effective information and records management system.

Benchmarks

- A2.4.1 Legal and operational records are kept of the museum's programs, activities and workers.
- A2.4.2 An effective system is in place to manage, and retrieve information from, the museum's records.
- A2.4.3 An annual report is produced and made available to the public.

CMP Evidence

R & A Records of museum's operations and history



R & A Copy of museum's latest annual report



R & A Copy of museum's Privacy Statement



Standard A2.4: Tips & Resources

What operational records to keep?

Records may include:

- annual reports
- financial records
- evidence of key decisions affecting policies and ongoing operations, such as meeting minutes and resolutions of the governing body
- personnel records (paid and/or voluntary)
- key administrative files

Records can be paper and/or electronic.

The museum's operational records are separate from the museum's collection records system, which is covered in C1.4.

Managing records

Records should be:

- appropriately organised
- backed up/duplicated as appropriate
- kept in accordance with operational policies and guidelines
- kept up-to-date
- stored at a central location
- labelled
- secure

Museums affiliated with government may have record-keeping responsibilities under relevant local, state and national legislation.

Documenting the museum's history

Material that documents a museum's own history is also worth retaining. For example:

- audio and video recordings
- promotional brochures
- evidence of museum events and community participation
- display handouts and catalogues, education materials
- media coverage (e.g. newspaper clippings)
- invitations
- merchandise samples
- photographs

Remember to date these records.

Annual report

The annual report of a museum that is part of a larger organisation may be included in that of the parent body or organisation.

Privacy

The National Privacy Principles apply to museums, as museums routinely gather and retain personal information about donors, oral history interviewees, workers and so on in their operational and collection records.

Museums should write a short statement of compliance with the National Privacy Principles and establish procedures to ensure that personal information is not disclosed inappropriately in the public arena.

Standard A2.4: Tips & Resources

Books and online publications

J Bettington et al, *Keeping Archives*, 3rd edition, Australian Society of Archivists, 2008

National Archives of Australia, *Keep It for the Future: how to set up small community archives*, Commonwealth of Australia, 2007

Standards Australia, AS ISO 15489: Records Management, 2004

Museums Australia, *Museum Methods*, 2002

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Privacy Statements: examples*

Websites

Office of the Privacy Commissioner, National Privacy Principles

www.privacy.gov.au

Australian Society of Archivists (Privacy Policy)

www.archivists.org.au




Standard A2.5

The museum uses sound financial management and reporting practices and procedures, and is financially viable.

Benchmarks

- A2.5.1 An annual financial plan or budget covers all aspects of the museum's operations and programs and reflects priorities in the Forward Plan.
- A2.5.2 Records are kept of all income and expenditure.
- A2.5.3 All mandatory financial requirements are fulfilled.
- A2.5.4 Financial controls are in place to prevent error and fraud.
- A2.5.5 Income is generated by the museum's operations.

CMP Evidence

R & A	Copy of latest annual audited/checked financial statement	
R & A	Guidelines and/or procedures for financial transactions, as required	
A	Copy of current annual budget (income and expenditure)	

Standard A2.5: Tips & Resources

Long-term and short-term financial planning

Museums should consider aligning financial planning and management with both short-term and long-term goals, as set out in the museum's Forward Plan.

Annual operating budget

Museums should consider setting annual operating budgets and income/sponsorship targets for:

- site management and improvements
- staffing needs and skills development
- resources and equipment
- displays and events
- collection records management
- improving the care, storage and display of the collection
- marketing and promotion
- fundraising

Good financial planning includes quarterly and half-yearly reviews of the annual operating budget. It is appropriate, too, to incorporate into budget considerations the depreciation and replacement of 'large ticket' items, such as computers and photocopiers.

Annual operating budget for accredited museums

CMP accredited museums are required to have an annual operating budget.

Registered museums are encouraged to do the same, but it is not a requirement at registration level within the CMP.

Mandatory requirements

These might include:

- meeting the requirements and regulations of the Australian Tax Office
- acquitting grants on time

What records to keep?

Financial records that should be kept might include:

- annual audited/checked accounts
- bank statements
- details of grants received and acquitted
- tax invoices
- till and other receipts

Financial controls

Useful controls include:

- having financial records prepared and verified or audited annually by a suitably qualified person
- procedures and training for workers to help to ensure that sales and other financial transactions are handled appropriately
- a fraud policy

Standard A2.5: Tips & Resources (continued)

Generating income

In order to be financially viable, museums need to generate income from their own operations.

Income sources might include:

- admission fees
- fundraising
- research and copyright/reproduction fees
- sale of merchandise
- venue hire

Recurrent or project funding might include:

- grants
- local government or other financial support for wages or operational costs
- sponsorship

In-kind support might include:

- work carried out by volunteers
- donated materials or resources
- donated services

Books and online publications

Jennifer Colbert, *Strategic Planning Manual*, Museums Australia, 1998

Kate Reynolds, *Just A Tick: A Best Practice Guide for Committees and Boards of Management*, Volunteering SA, Adelaide, 1999, revised edition 2002

N E Renton, *Guide for Meetings and Organisations*, vol 1: Guide for Voluntary Associations, 7th edition, LBC Information Services, Sydney, 2000

N E Renton, *Guide for Meetings and Organisations*, vol 2: Guide for Meetings, 7th edition, LBC Information Services, Sydney, 2000

Regional Arts Australia, *Creative Volunteering – No Limits: Carry Out Business Planning*, 2003

Websites

Australian Parliamentary Library's information about grants

www.aph.gov.au

Service SA's list of grant providers

www.service.sa.gov.au,

Online website for community groups

www.ourcommunity.com.au

Australian Taxation Office

www.ato.gov.au

Australian Federal Police (advice on reducing risk of armed robbery)

www.afp.gov.au

Independent Commission Against Corruption (advice on cash handling policies and procedures)

www.icac.nsw.gov.au

Regional Arts Australia

www.regionalarts.com.au

Volunteering Australia

www.volunteeringaustralia.org

Standard A2.6

The museum identifies and assesses risks and has strategies in place to manage them.

Benchmarks

- A2.6.1 Risk management is part of the museum's strategic and financial planning, through up-to-date policies, procedures and strategies.
- A2.6.2 Occupational health and safety (OH&S) obligations are fulfilled.
- A2.6.3 Adequate and appropriate insurance cover is maintained for the site, buildings, workers, visitors, the governing body, and the collection.
- A2.6.4 All required certificates and licences have been obtained and are kept current.

CMP Evidence

R & A Explanation of ways that the museum manages risks



Standard A2.6: Tips & Resources

What is risk management?

Risk management is about identifying and responding to current and potential risks, and the impact they might have on the operations and future of the museum and its collection.

Risks should be reassessed on an ongoing basis, as new risks may arise.

Why is risk management important?

Setting strategies to manage risks is an essential task for a museum's governing body or management committee.

Risks are many and varied, and can affect a museum's:

- brand and reputation
- legal status, performance and viability
- site, buildings and resources
- business/commercial operations
- collections
- finances
- visitors and their safety
- workers and their safety

Risks affecting museums

Some risks that might affect museums include:

- fraud and theft
- vandalism and arson
- bushfire, flood, storms, earthquakes and other natural events
- building works
- poor building and equipment maintenance
- moving the collection or collection items
- poor display environment and techniques that expose collections to damaging dust and pollutants, light, pest infestations, dampness, temperature and relative humidity fluctuations
- lack of sufficient number of workers
- worker age profiles and abilities
- poor work practices
- threat of closure and subsequent dispersal of collection
- financial debt
- loss of key records
- war and terrorism

Explanation of ways that the museum manages risks

During the site assessment, the History Trust will ask key questions about the following:

- the risks the museum faces
- strategies the museum has adopted in order to minimise these risks
- strategies the museum has put in place to protect the collection, the public and the museum's workers

Standard A2.6: Tips & Resources (continued)

Occupational Health, Safety and Welfare

Museums have legal obligations to provide for workers' occupational health, safety and welfare.

It is essential that museums have written policies and procedures.

For the Community Museums Program, however, the History Trust will not monitor or review a museum's compliance with this legislation.

Books and online publications

L Conole et al (eds), *Heritage Artefacts – Hands On Hands Off? Activating Heritage Artefacts – The Conservation and Safety Issues*, Scienceworks, Spotswood, Victoria, 1993

Museums Australia, *Museum Methods*, 2002

Volunteering Australia, *Running the Risk? Risk Management Tool for Volunteer Involving Organisations*, 2003, at www.volunteeringaustralia.org

Museum & Gallery Services Queensland, *Risk Management Fact Sheet*, at www.magsq.com.au

Websites

South Australian legislation www.legislation.sa.gov.au

South Australian Occupational, Health, Safety and Welfare Acts and Regulations www.safework.sa.gov.au

Simpsons Solicitors, Sydney www.simpsons.com.au

Part A: Managing the Museum

Principle A3: The museum manages its workers to make the best use of their skills and knowledge, and to achieve the museum's purpose.

Standard A3.1

The museum defines its key roles and tasks, and recruits and appoints suitable people for specific roles.

Benchmarks

- A3.1.1 The governing body includes an appropriate mix of skills and experience.
- A3.1.2 An organisational chart outlines all reporting and supervisory structures.
- A3.1.3 There are position descriptions or task sheets defining key roles and tasks of all workers.
- A3.1.4 Efforts are made to ensure that the museum will have suitably skilled workers to meet its future needs.
- A3.1.5 New workers are actively recruited for specific roles, tasks and projects, using appropriate selection processes and criteria.
- A3.1.6 Appointment procedures are fair, transparent, and consistent with legal requirements.
- A3.1.7 Additional workers are called on for special projects, as required
- A3.1.8 There are enough workers to meet day-to-day management and program requirements.

CMP Evidence

R & A Discussion on how the museum ensures that there are suitable people to carry out key operations and functions



A Copy of position descriptions and/or task sheets for key roles and tasks



Standard A3.1: Tips & Resources

Enough people with the right skills

It is important to try to have enough people with the right skills to carry out the day-to-day and long-term functions and operations of the museum.

Issues to consider include:

- the length of time individuals are likely to stay in their roles and who might have the skills and knowledge to replace them
- are there people who could be trained up or specially recruited?
- what about a mentoring program?
- developing a succession plan may help

Key roles and tasks

In a museum, workers may be engaged in the following roles and tasks:

- managing the collection, including donations, documentation (cataloguing), storage
- research and handling public enquiries
- developing and installing displays
- cleaning displays and collection items
- greeting visitors and other front-of-house duties
- taking guided tours and other visitor-related programs
- coordinating education programs for schools
- writing and editing for publications and displays
- responsibility for OHS&W and visitor safety
- maintenance of displays, galleries, buildings and gardens
- marketing and publicity
- preparing grant applications and seeking sponsors
- managing budgets
- volunteer coordination and training
- liaising with community and stakeholders
- organising community events and activities
- maintaining the museum's records management system
- managing the photographic collection, including digitisation projects
- purchasing equipment and supplies

See also A1.2

Recruiting workers

Look for people with appropriate experience, interests, qualifications and skills.

Appointment procedures

Australian employers are required by law to adhere to the principle of equal opportunity, to provide for diversity in the workplace.

Standard A3.1: Tips & Resources (continued)

Additional workers

The museum might engage other experts as:

- commissioned artists
- consultants
- contractors
- volunteers

These experts might include:

- accountants and auditors
- actors and performers
- artists and artisans
- conservators
- curators
- editors
- graphic designers and printers
- historians
- researchers and writers
- taxidermists
- tradespeople
- trainers, presenters and speakers

Books and online publications

Museums Australia, *Museum Methods*, 2002

Museums & Galleries NSW, Fact sheet: *Volunteer Succession Planning: A Practical Guide*, at www.mgnsw.org.au

Museums & Galleries NSW, Fact sheet: *Volunteer Succession Planning: Skills Audit*, at www.mgnsw.org.au

Volunteering Australia, *National Standards for involving volunteers in not for profit organisations*, 2001, at www.volunteeringaustralia.org

Volunteering Australia, *National Standards Implementation Guide for not for profit organisations involving volunteers*, 2003, at www.volunteeringaustralia.org

Heritage Collections Council, *reCollections*, 1998, at www.collectionsaustralia.net.au

Standard A3.2

The museum defines and communicates the duties, rights and responsibilities of the museum and its workers.

Benchmarks

A3.2.1 Written statements define the duties, conditions of engagement, rights and responsibilities of:

- the museum
- paid workers
- volunteer workers

A3.2.2 New workers receive an induction on their specific roles and tasks, and on the organisation.

CMP Evidence

R & A Induction materials provided for new workers



R & A Copy of museum's volunteer guidelines outlining the rights and responsibilities of the museum and its volunteers



Standard A3.2: Tips & Resources

Statements outlining duties, rights and responsibilities

Paid workers should be provided with written conditions of employment, and these should reflect federal and state requirements.

Conditions of employment are particularly relevant to museums that employ site wardens. It may be important to give site wardens clear guidelines on who has responsibility for the care and management of the collection.

For volunteers, their duties rights and responsibilities should be outlined in volunteer guidelines, which should acknowledge the efforts of volunteers and explain why and how the museum counts volunteer hours.

Volunteer guidelines might also cover:

- insurance for volunteers
- rights and responsibilities
- induction procedures and training opportunities
- who volunteers report to

CMP museums are required to have written volunteer guidelines.

Induction for new workers

CMP museums are required to introduce or induct new workers into the museum, its policies, functions and operations. This may partly be achieved by providing induction materials that include the museum's relevant current policies and code of ethics. Mentoring and training are other useful methods of induction.

Books and online publications

Museums Australia, *Museum Methods*, 2002

Volunteering Australia, *Model Code of Practice for Organisations Involving Volunteer Staff*, 2005, at www.volunteeringaustralia.org

Volunteering Australia, *National Standards for Involving Volunteers in Not for Profit Organisations*, 2nd edition, 2001, at www.volunteeringaustralia.org

Volunteering Australia, *National Standards Implementation Guide for Not for Profit Organisations Involving Volunteers*, 2001, at www.volunteeringaustralia.org

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Volunteer guidelines*

Standard A3.3

The museum acknowledges that museum work involves special skills, and gives workers opportunities to acquire or enhance these skills.

Benchmarks

- A3.3.1 The museum considers the skills required for its current and future activities, identifies gaps, and plans training for current workers.
- A3.3.2 Appropriate training is provided for workers, and its costs are subsidised by the museum where possible.
- A3.3.3 Up-to-date records are kept of training programs attended by museum workers.
- A3.3.4 Manuals, and other resources on museum practice, are available for workers as reference material.
- A3.3.5 Experienced workers are encouraged to act as mentors.

CMP Evidence

R & A Records of training programs attended by workers within the last 3 years



R & A Manuals and resources on museum practice available for workers



Standard A3.3: Tips & Resources

Assessing skills required

A suitable technique for identifying required skills is a skills audit.

Performance evaluations, both for workers and for members of a museum's governing body, can also provide helpful information on their skills.

Special museum skills

Special skills for museum work may include:

- cataloguing
- documentation and records management
- using a collection database
- planning and developing displays
- writing display text and labels
- digitising photographs and documents
- conducting research
- writing significance assessments
- caring for collections (preventive conservation), including
 - making display supports for collection items
 - storing and handling collection items
 - cleaning collection items and displays
 - integrated pest management
 - conserving historical machinery, vehicles and other large activated objects
 - developing conservation plans for significant collection items
 - risk assessments and risk management

Opportunities for skills development should be identified and included in the Forward Plan.

Training

Training can take many forms, including:

- access to relevant journals, websites and other information
- conferences, seminars and workshops
- accredited training, such as Vocational Education and Training courses (VET)
- formal inductions
- mentoring
- refresher courses

All workers need training, including management, paid workers and volunteers, and front of house and behind the scenes workers. Large museums will often have a designated volunteer coordinator who oversees induction and skills development for volunteers.

Membership of professional associations, peak bodies and networks are a great way to exchange ideas and access training to improve museum practices and encourage excellence.

The work of mentors can complement and follow on from formal training.

Standard A3.3: Tips & Resources (continued)

Training providers and museum qualifications

Artlab Australia and the History Trust of South Australia provide skills development workshops in a number of areas of museum practice.

Contact Artlab Australia's Preventive Conservator on:

Phone: 8207 7520

Email: artlab@saugov.sa.gov.au

Contact the History Trust on:

Phone: 8203 9888

Email: staff@history.sa.gov.au

There are also a number of tertiary courses available through universities across Australia, and there is a Certificate IV in Museum Practice available through the VET system.

Books and online publications

Key resources for museum practice include:

- Heritage Collections Council, *reCollections*, 1998, at www.collectionsaustralia.net.au
- Museums Australia, *Museum Methods*, 2002
- Heritage Collections Council, *Significance: a guide to assessing the significance of cultural heritage objects and collections*, 2001, at www.collectionsaustralia.net.au

Museums & Galleries NSW, *Volunteer Succession Planning: Skills Audit*, at www.mgnsw.org.au

Websites

Collections Australia Network

www.collectionsaustralia.net.au

Part A: Managing the Museum

Principle A₄: The museum is a secure, well-managed facility that presents a positive public image.

Standard A4.1

The museum has security of tenure for its premises.

Benchmarks

A4.1.1 The museum has a current lease or a land title, for its site; or correspondence confirming its right to the ongoing use of the site for a reasonable period into the future.

CMP Evidence

R & A

Current lease or land title; or relevant correspondence regarding ongoing use of the site



Standard A4.1: Tips & Resources

There are no Tips or Resources for A4.1.

Standard A4.2

The museum dedicates appropriate spaces to all activities.

Benchmarks

- A4.2.1** Efforts are made to have visitor orientation, displays, storage and loading, collection management, administration, meetings, and food preparation take place in appropriate spaces. Shops, public research areas, laboratories and workshops also have suitable, defined areas wherever possible.
- A4.2.2** Efforts are made to have the museum physically accessible to people of all ages and levels of ability, wherever possible.

CMP Evidence

R & A Map of museum site indicating use of spaces



R & A Explanation of efforts made to provide physical access for people of all ages and levels of ability to museum site, within circumstances and resources



Standard A4.2: Tips & Resources

Designated museum spaces for registered and accredited museums

CMP museums are required to have at least the following designated spaces in their museums:

- entrance or visitor orientation area
- display areas
- collection stores or storage spaces
- administration/cataloguing area

Any machinery workshops should be separate from areas where collection items are stored or displayed, to avoid dust, grease and chemical pollution, and to reduce the risk of fire and damage to the collection.

Areas where food is prepared or consumed should also be kept separate from storage and display spaces. If this is not possible, clean areas immediately after any such use.

It is desirable to have an area for workers separate from public spaces.

Hazardous materials

Designating a place for the proper storage of hazardous materials may also need to be considered.

Special cultural needs

In some museums, it may be appropriate to set aside space for cultural requirements such as storing and processing special collection items; or for ceremonial use.

Physical access

Making the museum physically accessible to people of all ages and levels of ability may include, within circumstances and resources:

- providing ramps where steps may be an impediment; or providing an alternative entrance
- keeping passageways clear and wide enough in display galleries for ease of movement for people with prams, walking aids and wheelchairs
- providing disability parking spaces
- providing full toilet facilities
- providing information in different formats, such as visual and audio
- providing written information at different eye levels

If a museum occupies a two or three-storeyed building with access to upper floors only by stairs, consider providing folders or a video or small display on the ground floor, showing what is upstairs.

Access is about more than just physical access. Consider also cultural, social, intellectual, attitudinal and financial access to your museum.

Standard A4.2: Tips & Resources (continued)

Books and online publications

Museums & Galleries NSW, *Introduction to Access*, at www.mgnsw.org.au

Museums Australia, *Museum Methods*, 2002

E Martin, *Improving Access to Heritage Buildings*, Australian Heritage Commission, 1999, at www.environment.gov.au

Accessible Arts, *Venue Access Audit*, at www.aarts.net.au







Standard A4.3

The museum conserves, maintains, protects and documents its assets.

Benchmarks

- A4.3.1 The museum premises provide a suitable and safe environment for all of the museum's operations, including the storage and display of the collection.
- A4.3.2 Regular maintenance and building inspections ensure that the museum's site, grounds, garden, buildings and equipment are kept tidy, clear of rubbish and in good repair.
- A4.3.3 The museum draws on appropriate advice about its sites, gardens, buildings, fixtures and in situ collections of heritage significance, and develops and maintains these places according to conservation principles.
- A4.3.4 The museum meets fire safety standards.
- A4.3.5 The museum uses appropriate security measures.
- A4.3.6 Facilities are managed with consideration for the sustainability of natural resources.
- A4.3.7 Up-to-date registers are kept, listing all museum assets and equipment.
- A4.3.8 There is a written policy on the commercial use of the museum's assets.

CMP Evidence

R & A	Explanation of fire safety measures	
R & A	Explanation of security measures	
R & A	Explanation of site and equipment maintenance processes	
R & A	Explanation of considered use of natural resources, e.g. recycling, lighting, blinds, passive energy design	
R & A	Copy of policy on commercial use of museum assets, if relevant	
A	Register/s listing museum assets and equipment	

Standard A4.3: Tips & Resources

Museum assets

Assets and equipment might include:

- buildings and outdoor fixtures
- cameras
- computers and printers
- furniture, lighting, display cases, gallery fittings
- heating/air conditioning plant
- telephones and mobiles, fax and photocopiers
- tools and equipment

The museum's collection items are not assets in the same sense as the above list. Collection registers and catalogues should be managed separately from other asset registers.

What is a suitable and safe environment?

Museum buildings should be:

- solid and stable
- dry
- well-ventilated
- insect and vermin proof

Fire safety

Fire safety measures should include:

- emergency procedures, including having a designated safe assembly point
- fire drills
- fire extinguishers
- 'No Smoking' signs and/or designated smoking areas
- regular maintenance of fire safety equipment
- smoke alarms

Security

Appropriate security measures may include:

- alarms
- monitored exit procedures
- fences
- gates
- locks
- movement sensors
- security patrols
- systems for issuing, copying and returning keys

Commercial use

Commercial uses might include:

- commercial filming or photography on, or of, the premises
- lease of buildings on the premises
- sale of merchandise

Standard A4.3: Tips & Resources (continued)

Using natural resources

Strategies to consider:

- conserve water in gardens and kitchens
- conserve energy by switching off appliances and power points when not in use
- provide recycling bins (or access to off-site recycling facilities)
- dispose appropriately of hazardous waste such as paint
- adopt passive energy design for new building works or site maintenance programs - e.g. insulation, external blinds, and replacing trees
- install energy-efficient lights

A Sustainability Policy may help to define and guide the museum's approach to these issues.

Maintenance

Useful strategies for site maintenance include:

- maintenance schedules for the buildings, grounds, gardens and equipment
- having a nominated maintenance person or team
- working bees

Books and online publications

Australian Conservation Foundation and the Australian Commercial Galleries Association, *The Green Gallery Guide* (2008), at www.acga.com.au

Museums Australia, *Museums and Sustainability* (2002), at www.museumsaustralia.org.au

Heritage Collections Council, *Guidelines for environmental control of cultural institutions*, 2002, at www.collectionsaustralia.net.au

Museums Australia, *Museum Methods*, 2002

Resource, *Security in Museums, Archives and Libraries* (2003), at www.mla.gov.uk

Part B: Involving People

Principle B1: The museum is used, supported and valued by diverse communities as a worthwhile place where people can express, share and discover significant stories, ideas and objects.

Standard B1.1

The museum includes a range of people in its operations and programs.

Benchmarks

- B1.1.1** Efforts are made to represent the diversity of the museum's community in the governing body, management and workforce of the museum.
- B1.1.2** Community members are involved in a diversity of roles and activities.
- B1.1.3** Representatives and members of local and/or specialist organisations and communities are invited to contribute their knowledge, insights and expertise to museum planning, collection development, and programs.
- B1.1.4** Efforts are made to address the interests and needs of different audiences, age groups, and levels of ability, in museum activities.

CMP Evidence

R & A

List of community groups and key individuals who have contributed to museum operations and programs over the past 1-3 years



A

Statement summarising diversity of museum's wider community



A

Description of programs developed for different audiences, age groups and levels of abilities



Standard B1.1: Tips & Resources

Gaining a sense of diversity of museum's wider community

Museums can gain a sense of diversity in the wider community by researching statistics on people's:

- age
- cultural background
- disability
- education
- employment status and income
- gender
- special interests

Local government data and cultural plans or 'maps' may be useful. Statistical information available from the Australian Bureau of Statistics may also be helpful.

Involving community groups and key individuals in museum operations and programs

Groups and people in the community can be involved in the museum in many ways, including the following:

- advisers
- cataloguers
- display development and construction
- donors and lenders
- friends groups
- gardeners
- hosts for special events
- interpreters
- interviewees for oral history
- IT assistants
- maintenance
- members
- members of the governing body
- partners
- photographers
- researchers
- speakers
- special guests
- sponsors and supporters
- tour guides and junior tour guides
- volunteers
- website 'bloggers'

Consider targeting those who aren't already represented at the museum, in order to be more inclusive and gain benefit from involving people with different backgrounds, skills, life experiences and networks.

Keep in mind that there are a whole range of barriers to people getting involved, including cultural background, working hours, out-of-pocket expenses, and feeling welcome.

Standard B1.1: Tips & Resources (continued)

Suggested strategies to approach community members include:

- flyers
- networking within other community organisations
- newsletters
- media appeals
- public notices
- visits to new residents

It can also be useful to create and maintain lists of community contacts for invitations, future reference and activities.

Types of community groups to approach

Community groups and organisations might include:

- government departments and agencies such as economic, tourism and marketing boards; local council representatives; education bodies; Indigenous and cultural/linguistic groups
- service groups; access advocacy organisations; child care and youth groups; clubs, aged care/disability facilities; businesses; arts and environmental groups
- individuals including artists, scientists, historians, educators, parents, care-givers and students

Contributions might involve:

- being members of advisory committees, event and exhibition teams;
- suggesting topics for displays and other programs;
- contributing their own displays and activities;
- identifying significant material held in the collection;
- providing advice and information relevant to their history and culture

Depending on the organisation or community, it may be useful to work together to create a formal memorandum of understanding.

A practical way to gain input is through informal meetings. Consider meeting times that respect participants' other commitments.

Addressing the needs of different audiences

Different audiences might include:

- students and teachers
- tourists, such as 'grey nomads'
- VFRs (visiting friends and relatives)
- senior citizens and other retiree groups
- special interest groups, such as collectors and craft groups
- women's or mothers' groups
- new residents
- special needs groups and carers

Standard B1.1: Tips & Resources (continued)

Grouping these current and potential audiences means that efficient and effective strategies and programs can be designed for reaching them.

Some potential audiences will be more likely to respond than others. Focus on reaching and influencing them first.

Books and online publications

Museums Australia, *Museum Methods*, 2002

S Jones, *Community, Culture and Place: A Local Government Handbook for Museums*, Museum Studies Unit, University of Sydney, for the NSW Ministry for the Arts, 2000

Museums & Galleries NSW Fact Sheet, *Introduction to Access*, at www.mgnsw.org.au

Council for Museums, Archives and Libraries (UK), *Access for All Toolkit: enabling inclusion for museums, libraries and archives*, 2004, at www.mla.gov.uk

Museums Australia (Qld), *Taking the Time: museums and galleries, cultural protocols and communities*, 1998, at www.collectionsaustralia.net.au

P Landmann et al, *Many Voices Making Choices: Museum Audiences with Disabilities*, 2005

K Winkworth and S Dickman, *Significant Events: a museums and galleries training program*, 2000-01, at www.collectionsaustralia.net.au

DCITA, *Tourism with Integrity: best practice strategies for cultural and heritage organisations in the tourism industry*, 1999, at www.collectionsaustralia.net.au

Websites

Australian Bureau of Statistics

www.abs.gov.au

Museums Australia

www.museumsaustralia.org.au

Standard B1.2

The museum carries out its activities as part of a broader community and contributes to community events.

Benchmarks

B1.2.1 The museum participates in community events.

CMP Evidence

R & A List of community activities and events in which the museum has been involved over the last 3 years



Standard B1.2: Tips & Resources

Community events

Community activities and events can include:

- celebrations
- commemorations
- festivals
- fundraising events
- regular fixtures, such as an annual show or market days
- special events
- visiting aged-care facilities

Consider these occasions when planning the museum's annual program of activities.



Books and online publications

K Winkworth and S Dickman, *Significant Events: a museums and galleries training program*, 2000-01, at www.collectionaustralia.net.au

Part B: Involving People

Principle B2: The museum presents its most significant collection items, stories and themes through engaging exhibitions and programs.





Standard B2.1

The museum selects significant collection areas, stories or themes to highlight, based on what is most relevant to its purpose and audiences.

Benchmarks

- B2.1.1** The museum's significant collection areas, themes or stories are outlined in a written policy or plan.
- B2.1.2** Exhibitions, displays and activities are changed to attract and interest new audiences and repeat visitors, using a variety of collection items, themes and stories.
- B2.1.3** A variety of methods are used to present stories, exhibition themes and the collection, to museum audiences.
- B2.1.4** The significance of the museum's objects, buildings and site is explained to the public.
- B2.1.5** Efforts are made to research and interpret significant stories, themes and collection areas from the past and up to the present day, and from a range of perspectives.

CMP Evidence

R & A	List of museum's displays and interpretive programs over last 1-3 years	
R & A	Examples of a variety of methods used to present stories, ideas and collection items	
R & A	Examples showing how the museum explains the significance of key collection items, buildings and the museum site	
R & A	Examples showing how the museum covers different eras and perspectives in its displays and interpretive programs	

Standard B2.1: Tips & Resources

Interpretation policy

An interpretation policy is one of the essential documents for history museums, as it sets the framework within which the museum presents its key stories, messages and objects.

An interpretation policy contains:

- a summary of the museum's significant stories, topics, collection items, historical themes, ideas and messages, in line with its stated purpose
- methods and approaches used to develop displays and other interpretive programs

The CMP requirement to have an Interpretation Policy is listed in A2.2.

Implementing an interpretation policy

Presenting aspects of South Australia's history is a fundamental focus of effort for CMP museums.

To develop interpretive activities a museum might:

- draw up a flow chart or map showing the areas designated in the museum for particular stories, objects or historical themes/ideas
- plan a schedule of varied and changing interpretive programs, in line with the museum's Forward Plan
- establish a working group/s to be responsible for the planning and timely delivery of interpretive programs
- conduct research into the community's history and the museum's collection, and set collecting goals
- consider actual and potential audiences
- determine what resources and funding are needed
- consult with relevant community groups and encourage community involvement
- produce writing, design and formatting guidelines
- seek expert assistance from historians, editors, researchers, designers and printers
- consider how to gather visitor feedback

Changing displays and activities

Museums can consider designating a particular space within the museum specifically for changing displays.

Changing displays complement the collection items, ideas and stories presented in the museum's main display areas.

Changing displays and activities mean that museums can present different collection items, themes and stories, involve new audiences, and protect the collection from deterioration.

Changing display areas mean that community groups, collectors and individuals can put on their own displays, showing items and telling stories that relate to them. These community-based displays can change every six months or so, depending on the museum's circumstances and resources.

Standard B2.1: Tips & Resources (continued)

Presentation methods

There are many different ways to interpret and present stories, themes and collections to museum audiences: They include:

- demonstrations
- education kits
- displays (on-site and off-site)
- multimedia
- oral histories
- performances
- publications, such as books, handouts, brochures, flip cards, browser books
- special activities, such as plays, arts and crafts
- talks
- tours
- websites
- workshops

Museums can use several methods of presentation within the one interpretive program or activity. And apply different methods for different programs and audiences over time.

Knowing and explaining what is significant

Museums are responsible for assessing, researching, recording and explaining the significance of their collections, buildings and site. The process can involve numerous people, including donors or former users, local historians, other museums and experts.

The essential guide to assessing significance is the Heritage Collections Council's publication: *Significance: a guide to assessing the significance of cultural heritage objects and collections*.

It defines significance as:

'The historic, aesthetic, scientific/research and social/spiritual values of an object or collection for past, present and future generations. Significance incorporates all the elements that contribute to an object's meaning, including its context, uses and social and spiritual values to people and communities. Significance is not set in stone, but may grow and diminish over time.'

According to the publication, 'Significance assessment reviews the meanings and values of the object...It describes why this object is important enough to deserve a place in a museum and to demand time and energy necessary to maintain it'. It includes contemporary collecting.

Standard B2.1: Tips & Resources (continued)

What makes a collection, building or site significant?

Museums may consider an item or collection, building or site significant if it:

- relates to the museum's Statement of Purpose
- is associated with relevant people, events, places, themes, skills and crafts
- is valued by the museum's communities for social, economic, cultural, religious or spiritual reasons
- demonstrates important social customs
- represents items once commonly available and represents changing trends related to the museum's focus
- And in the case of collection items, other criteria applies, including:
 - extent of accompanying information and history (provenance)
 - condition and integrity of the object
 - cost of preserving and storing the object
 - relationship to other objects which reinforce its significance
 - availability in other collections elsewhere
 - its display potential

Some computer databases prompt museum cataloguers and researchers to assign significance to items and collections.

For further details about significance, see C1.2.

Putting significance into practice

Museum workers sometimes forget that although they know why an item, collection, building or site is significant, it is not always obvious to the visitor without interpretation and explanation.

The act of merely displaying an item, for example, does not by itself explain the significance and meaning of that item. Telling stories associated with collection items, buildings and sites is a fundamental focus of effort for museums, especially history museums.

Many museum collections are not fully catalogued. Often information about collection items is in the heads of long-time workers. Make sure that this knowledge is transferred on to museum records, labels and storyboards. Otherwise, the meaning of those items is potentially lost forever.

Standard B2.1: Tips & Resources (continued)

Different eras and different perspectives

Museums can enhance the significance and impact of a collection item, building or heritage site by conveying stories and ideas that relate to and come from different eras and from different perspectives.

Aim to present more than one side of the story of an item, collection or building. In the case of heritage buildings, for example, visitors are often keen to know about the changing owners and users, so that they can appreciate the whole story over time. Presenting only the history of one owner or one era potentially diminishes the overall significance and impact of the building.

Books and online publications

Heritage Collections Council, *Significance: a guide to assessing the significance of cultural heritage objects and collections*, 2001, at www.collectionsaustralia.net.au

Australian Heritage Commission, *Australian Historic Themes*, 2001, at www.environment.gov.au

Federation of Australian Historical Societies Inc, *Heritage Tourism in Australia: a guide for historical societies*, 2008, at www.history.org.au

S Jones, *Sharing Our Stories: Guidelines for Heritage Interpretation*, National Trust (WA) and Museums Australia (WA), 2007, on www.ntwa.com.au

DCITA, *Tourism with Integrity: best practice strategies for cultural and heritage organisations in the tourism industry*, 1999, at www.collectionsaustralia.net.au

M Love, *Guides in Action: A handbook for interpretative guides*, 2007

G Moscardo, R Ballantyne and K Hughes, and S Ham (editor), *Designing Interpretive Signs: Principles in Practice*, Canada, 2007

K Winkworth and S Dickman, *Significant events: a museums and galleries training program*, 2000-01, at www.collectionsaustralia.net.au

National Trust of Australia (WA), Museums Australia (WA), *Guidelines for Heritage Interpretation*, 2007, at www.ntwa.com.au

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Interpretation Policy*






Standard B2.2

The museum's exhibitions, activities and events are based on sound research and current museological practices.

Benchmarks

- B2.2.1 Research and scholarship are shared with the wider community through publications or other means.
- B2.2.2 All information and interpretation is well researched and sources are appropriately acknowledged.
- B2.2.3 Museum interpretation acknowledges differing points of view and any uncertainty about facts.
- B2.2.4 It is made clear to visitors that replicas, reproductions and props are not original objects.

CMP evidence

R & A	Examples of programs or publications based on research	
R & A	Examples of: <ul style="list-style-type: none">▪ acknowledgement of doubt or uncertainty about facts▪ acknowledgement of sources and copyright	
R & A	Examples of: <ul style="list-style-type: none">▪ acknowledgement of use of replicas or reproductions▪ acknowledgement of use of props	
A	Example of an interpretive program where differing points of view, or contested history, have been included	
A	Examples of how the museum has applied current museological practices	

Standard B2.2: Tips & Resources

What are sound research practices?

Sound research practices include:

- defining the focus of any research project
- avoiding assumptions
- seeking complexity and diversity, in order to avoid presenting a one-dimensional view of the past; for example, look for evidence of the tough times as well as times of 'progress' and prosperity
- researching how things have changed over time
- researching contemporary history, that is, the history of those who make up our communities today
- avoiding generalisations about the past as 'the olden days' or 'the good old days', by placing stories within the context of their century, decades or years
- compiling different voices and stories about the one theme, time period or topic, even when these voices and stories contradict and conflict with each other
- analysing the past, not just compiling facts and dates
- looking for broader national and international perspectives on local stories, such as war, immigration, global trade, changing roles of women, new technologies...
- thinking about whose stories have been included, and therefore, excluded; for example, look for a balance of men, women and children, pioneers and new arrivals, workers and bosses, Indigenous and non-Indigenous...
- checking facts and dates, from a number of different sources, and acknowledging doubt where doubt exists
- keeping a detailed bibliography or list of sources consulted; and acknowledging the sources of information and images
- keeping well-organised research files

What are current museological practices?

Current museological practices related to displays and other interpretive programs include:

- explaining the significance of objects and collections
- grouping and/or juxtaposing objects in meaningful ways to highlight particular topics, themes, ideas, changes, arguments and stories
- interpreting objects and collections from different perspectives and in different contexts
- placing objects and photographs within clear historical contexts and eras
- presenting programs that are inclusive and representative of the diversity of the museum's communities and histories

Standard B2.2: Tips & Resources (continued)

- ensuring that interpretation reveals the complexity and diversity of a topic, theme, idea or story, over time
- acknowledging the use of replicas, reproductions or props
- following cultural protocols, where relevant, e.g. in displaying and interpreting material belonging to Indigenous Australians

Museums send confusing messages about the past when historical items from different eras are arranged together, without any time differentiation. Visitors can be forgiven for assuming that they were all from the same time and used by the same people. Explain changes in technology, styles and models, and patterns of use over time. Give visitors clues about what era/s items belonged to.

It is equally as important to date photographs so that visitors can understand different times, eras and historical changes.

If an exact date is not known, then use the term *circa*, for example *c1892*, or indicate a date range or era, for example, *1920s – 1940s*, *mid-19th century*, *late 20th century*. It is better to do this than to give no date at all.

Publishing material

When publishing any material, such as books, CDs, DVDs, labels, tour guides, education materials, handouts, and websites, it may be useful to employ a researcher, historian and/or editor to assist with the process and, in particular, to check the accuracy of the material. This can also apply to displays, as they are a form of publication.

Remember to comply with legal deposit laws for published and publicly available material. Check with the local library or the State Library of South Australia.

The History Trust appreciates the donation of published material for its resource centre on South Australian history.

Acknowledgements

Acknowledgment includes acknowledging rights such as copyright and privacy, as well as acknowledging sources of information and contributors.

Acknowledging doubt

Doubt can be acknowledged with qualifying phrases such as 'it is believed that' or 'possibly belonged to', or by the use of 'circa' for dates.

Standard B2.2: Tips & Resources (continued)

Replicas and props

Replicas, props and reproductions can be identified as different from original objects in various ways, including explanatory labels and display techniques.

Replicas, props or reproductions can be useful in some museum settings:

- when it is not safe to display originals
- if originals no longer exist
- as part of hands-on activities or other approaches to interpretation

Contested history

Contested history or differing points of view, for example, about an event, circumstances or people in the past, can be conveyed in displays through a number of means, including

- the use of oral history and 'opposing' quotations
- 'double' labelling, with each label offering a different point of view about an object or historical issue

Books and online publications

Museums Australia, *Museum Methods*, 2002

H Dakin, *Galleries & museums: a copyright guide*, Australian Copyright Council, 2005

G Rouette, *Exhibitions: a practical guide for small museums and galleries*, Museums Australia (Vic), 2007

G Moscardo, R Ballantyne and K Hughes, and S Ham (editor), *Designing Interpretive Signs: Principles in Practice*, Canada, 2007

National Trust of Australia (WA), Museums Australia (WA), *Guidelines for Heritage Interpretation*, 2007, at www.ntwa.com.au

E H Carr, *What is History?*, Penguin (reprinted 2008)

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Historiographical Principles and Applications*

Websites

Interpretation Australia

www.interpretationaustralia.asn.au







Standard B2.3

The museum's exhibitions, activities and events actively encourage lifelong learning.

Benchmarks

- B2.3.1** Information developed for visitors is accessible and clear.
- B2.3.2** Objects on display are arranged to convey significant collection areas, themes, stories and ideas.
- B2.3.3** Displays are well designed and text is clear, well organised and concise.
- B2.3.4** Activities and events include learning experiences suited to people of different ages, cultural backgrounds, and abilities.
- B2.3.5** Activities and events give visitors opportunities to respond and get involved.
- B2.3.6** Evaluations of exhibitions, activities and events are used to improve programs and inform future planning.

CMP Evidence

R & A	Examples of the meaningful grouping of collection items	
R & A	Examples of opportunities for visitors to respond and get involved in displays and programs	
R & A	Example of a completed review of a display or other interpretive program, using History Trust template	
R & A	Example of a well-designed and well-organised display	
A	Example of a major display project, using museum consultants	
A	Explanation of how the museum evaluates its displays, activities and events, and applies the results	

Standard B2.3: Tips & Resources

Presenting information for life-long learning

There are many options for presenting information in museums, including:

- audio tours/downloads
- demonstrations
- displays
- DVDs
- guided tours
- publications
- websites

Consider the types of learning experiences offered to visitors and museum workers through these interpretive programs.

Experiences might include learning that is

- informal
- formal
- curriculum-based
- tailored to different learning styles

Grouping collection items on display

Collection items can be grouped or arranged to:

- convey their significance
- tell significant stories and reveal key messages
- help provide context for each other
- support or contradict other historical evidence
- convey ideas presented in exhibition text, a brochure or other interpretive materials

Items can be grouped to show:

- particular historical themes, community events, places, and periods of time
- changes over time
- the history or interests of particular people, families or groups, including children
- the place of origin and use of types of objects, and associated traditions, skills and rituals
- political and civic contributions, attitudes, allegiances and issues
- rites of passage, such as birth, death, marriage, celebration, graduation...
- emotional connections to objects

Collection items often have more than one historical context or story to tell. A museum can keep creating new points of interest by changing the ways in which items are grouped, so that they reveal different themes or stories.

Standard B2.3: Tips & Resources (continued)

Many museums are tempted to arrange collection items according to the space available in the display areas. This practice often confuses visitors, muddles any logical narrative, and separates items that once belonged to the same historical context (although these contexts can change). Collection items have more meaning if they are arranged in ways that reveal their historical, social and cultural connections.

Consider inviting people and organisations from the community to select and interpret items of their choosing from the collection.

Developing well designed and well organised displays

Museum visitors will respond, positively or negatively, to the way you have presented your galleries and displays.

Museums might consider employing the services of museum consultants, such as an interpretation adviser, historian and/or graphic designer, especially for major display projects.

Having a regular maintenance schedule in place can help exhibitions and displays to look fresh and inviting.

Involving visitors

Ways to actively involve visitors in interpretive programs might include:

- blogs and other website interaction and feedback
- dress-ups and touch trolleys
- family or group activities
- interactive exhibits; making and doing
- opportunities for discussion and learning
- opportunities to bring in their own collection items
- visitor response books for recording opinions, reactions and memories

Review of displays and other interpretive programs

One way to improve current and future interpretive programs is to critically review displays and other interpretive programs.

CMP museums are encouraged to develop skills in evaluation. The History Trust provides a template for museums to use. The Trust also requires a museum seeking CMP registration to undertake training in the use of this template and to submit at least one completed form.

Standard B2.3: Tips & Resources (continued)

Display review

A display review considers the following:

- Do the displays reveal significant collection items, stories, themes and ideas?
- Are display rooms attractive and inviting?
- Are they clean and set out in an orderly way?
- Can visitors easily, comfortably and safely move around the display areas?
- Is there sufficient space between different themes and groups of items?
- Are items safe from deterioration and damage?
- Is information presented clearly?
- Are storyboards, labels and captions easy to read?
- Are they consistent in design and style?
- Are storyboards arranged for comfortable reading?
- Is information provided in different formats to vary visitors' experiences, and cater for different audiences?
- Are there opportunities for visitor interaction?
- Are grammar and spelling correct?
- Are there any storyboards, labels, captions or information sheets that need replacing because they are damaged, faded, dirtied, torn or dog-eared?



Standard B2.3: Tips & Resources (continued)

Books and online publications

Museums Australia, *Museum Methods*, 2002

G Rouette, *Exhibitions: a practical guide for small museums and galleries*, Museums Australia (Victoria), 2007

Federation of Australian Historical Societies Inc, *Heritage Tourism in Australia: a guide for historical societies*, 2008, at www.history.org.au

S Jones, *Sharing Our Stories: Guidelines for Heritage Interpretation*, National Trust (WA) and Museums Australia (WA), 2007, on www.ntwa.com.au

DCITA, *Tourism with Integrity: best practice strategies for cultural and heritage organisations in the tourism industry*, 1999, at www.collectionsaustralia.net.au

M Love, *Guides in Action: A handbook for interpretative guides*, 2007

G Moscardo, R Ballantyne and K Hughes, and S Ham (editor), *Designing Interpretive Signs: Principles in Practice*, Canada, 2007

Accessible Arts Fact Sheet: *Interpretive Signage Principles and Practice*, www.aarts.net.au

Collections Australia Network, 'Creating good web content' and 'Engaging your Audience in Social Media - blogs, wikis and podcasts explained', at www.collectionsaustralia.net.au

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Review of display/interpretive program: a template*
- *Display development and design*
- *Display interpretation and writing*
- *Outdoor interpretive signage* (South Australian Tourism Commission, 2000)

Websites

Museums Australia Evaluation and Visitor Research Special Interest Group (EVRSIG) <http://archive.amol.org.au/evrsig/>

Part B: Involving People

Principle B3: The museum is committed to its current and potential audiences, and caters for their needs and interests through its communications, programs and services.

Standard B3.1

The museum knows who its current and potential audiences are and has strategies to attract and retain them.

Benchmarks

- B3.1.1 Records are kept of visitor numbers, and of types of visitors.
- B3.1.2 Records of visitor numbers are evaluated to help the museum understand visitation patterns and assist in planning for the future.
- B3.1.3 Visitors are invited to give feedback about their museum experience, and this information is evaluated and used in planning.
- B3.1.4 The Forward Plan includes strategies to attract existing audiences as repeat visitors, and ideas for drawing in other potential audiences.

CMP Evidence

R & A Records of visitor numbers and types of visitors



R & A Examples of visitor responses and feedback



A Explanation of visitation patterns



A Explanation of strategies implemented to attract and retain audiences



A Example of a visitor survey



Standard B3.1: Tips & Resources

Visitor numbers and types

CMP museums are required to count visitor numbers and record types of visitors.

Visitor tallies might be compiled on a daily, weekly, monthly and/or yearly basis. Entering information into a daily diary or daily sheet at the entrance desk can be one easy method for keeping track of visitor numbers. Small hand-held counters can be purchased, too.

Information about types of visitors can be based on tallies of numbers of:

- adults
- children
- people from specific Australian postcode areas
- international visitors
- booked groups and types of booked groups, e.g. schools and/or year levels, seniors, tour groups
- special needs groups

Don't forget to count online visitors.

Museums can also keep a tally of the number of research enquiries.

Visitation patterns

Accredited museums are expected to gather information about visitation patterns. Which days and months are busiest or quietest? Are visitors older people, children, mostly men or predominantly women?

Understanding visitation patterns helps museums to meet visitors' needs by providing enough workers and activities to match typical demands at specific times, and by scheduling programs and events when target audiences are more likely to attend.

Visitor feedback and surveys

Feedback can be obtained through:

- visitor books placed at the entrance or exit
- questionnaires and surveys, conducted either on-site or off-site, or online

If you invite visitors to write in a visitors book, remember that most people are polite and will tend to write positive messages, rather than offer anything critical. An anonymous survey might achieve more wide-ranging feedback.

Use visitor feedback to improve current programs or develop new ones. Invite visitors to suggest display ideas and topics.

Accredited museums are expected to conduct and analyse visitor surveys on a regular basis and use the information to plan future activities.

Standard B3.1: Tips & Resources (continued)

Strategies to attract current and potential audiences

Strategies might be based on research to identify the types of activities and events likely to attract particular audiences, based on factors such as:

- age
- cultural background
- education
- gender
- special interests

Why not draw on tourism data and the Australian Bureau of Statistics?

An awareness of why some people don't come to the museum can be very useful, too. Think about identifying media opportunities to raise awareness about the museum and its programs in the wider community.

Marketing strategies should be included in the museum's Forward Plan.

Books and online publications

S Dickman, *Visitor Research Made Easy for Museums, Galleries and Exhibition Spaces*, 2006, at www.arts.vic.gov.au

EVRSIG and Museums Australia, *Profiling your visitors*, 2004, at <http://archive.amol.org.au/evrsig>

Museums Australia, *Museum Methods*, 2002

Accessible Arts, *Accessing the Arts*, at www.aarts.net.au

DCITA, *Tourism with Integrity: best practice strategies for cultural and heritage organisations in the tourism industry*, 1999, at www.collectionsaustralia.net.au

Australian Museum Audience Research Centre (AMARC), at <http://amonline.net.au/amarc/research/audiences.htm>

Websites

Museums Australia Evaluation and Visitor Research Special Interest Group (EVRSIG) <http://archive.amol.org.au/evrsig/>

Standard B3.2

The museum promotes its collection, key attractions, programs and services.

Benchmarks

B3.2.1 A range of promotional tools are used to make potential audiences aware of the museum and to encourage them to visit.

B3.2.2 Promotional material is up-to-date.

CMP Evidence

R & A Copy of current promotional brochure or other printed marketing materials



Standard B3.2: Tips & Resources

Promotional tools

Promotional tools include:

- advertising
- brochures
- direct mail
- flyers
- information in tourism brochures
- media releases
- newspaper articles
- noticeboards
- public talks
- radio interviews
- special offers in conjunction with other local attractions
- tourism-related television programs
- websites

Up-to-date information

Keeping information on the museum up-to-date can be time-consuming, but essential if the museum is to gain tourism accreditation and retain the confidence of the local community, repeat visitors and tourists.

Books and online publications

Museums Australia, *Museum Methods*, 2002

DCITA, *Tourism with Integrity: best practice strategies for cultural and heritage organisations in the tourism industry*, 1999, at www.collectionsaustralia.net.au

K Winkworth and S Dickman, *Significant events: a museums and galleries training program*, 2000-01, at www.collectionsaustralia.net.au

Websites

Collections Australia Network

www.collectionsaustralia.net.au

Standard B3.3

The museum provides information to help visitors locate the museum and find their way around while they are there.

Benchmarks

- B3.3.1** The museum works with relevant authorities to have road signs installed in the surrounding suburb, town or city, to help people find the museum.
- B3.3.2** Information signs at the site include the museum's name, opening hours, entry fees and contact details, and information about access and facilities for people who have disabilities.
- B3.3.3** There is orientation information to help visitors find their way around the museum and understand what there is to see and do there.

CMP Evidence

R & A Photographs of museum signage



R & A Copy of any printed orientation information for museum site and galleries



Standard 3.3: Tips & Resources

Road signs

Explore your options through federal, state and/or local government departments.

Orientation information

The term 'orientation' can refer to physical orientation for visitors, such as way-finding and directions around the museum. It also covers conceptual orientation in relation to displays, e.g. introducing key themes and messages.

Orientation methods include:

- audio guides
- brochures
- computers or touch screens
- maps
- signage
- guided tours

Books and online publications

Museums Australia, *Museum Methods*, 2002

Standard B3.4

The museum has regular opening hours.

Benchmarks

- B3.4.1** A roster is in place to make sure enough workers are on duty to maintain the museum's regular opening hours and/or pre-arranged appointment times.
- B3.4.2** Contact details are publicised so that visitors can access the museum by appointment if they wish to.

CMP Evidence

R & A Statement of museum's opening hours



R & A Copy of current roster



Standard B3.4: Tips & Resources

Regular opening hours

Museums differ in their regular opening hours, reflecting different circumstances and resources. Whatever opening hours a museum sets, the museum must be prepared to keep to those hours, otherwise it risks losing the confidence of its community and its visitors.

Some CMP museums are only open for special occasions or once a month. Others, especially those associated with Visitor Information Centres or libraries are able to be open seven days a week.

Make sure that the museum has a way of coping with roster 'hiccups'.

Open by appointment only

Where a museum opens only by appointment, it needs to have the resources and people available to respond to these requests and bookings.

Some museums also have volunteers on stand-by, in case of the need to respond to a request for immediate access. Contact details need to be publicly available on museum signage, websites or brochures, and be up-to-date.

Publicising contact details

Museums can use Collections Australia Network (CAN) and the Australian Tourism and Data Warehouse (ATDW) to publicise contact details. Alternatively, phone and email addresses might be printed on promotional brochures, on museum signage, or in local newspapers.

Books and online publications

Museums Australia, *Museum Methods*, 2002

Websites

Australian Tourism Data Warehouse

www.atdw.com.au

Collections Australia Website

www.collectionsaustralia.net.au

Standard B3.5

The museum offers visitors a welcoming experience, and its workers respond appropriately to visitor enquiries and feedback.

Benchmarks

- B3.5.1** Visitors are given an appropriate welcome.
- B3.5.2** Staff and volunteers have a customer focus and are well-informed about the museum's purpose, key objectives, and activities.
- B3.5.3** All face-to-face, telephone and email enquiries and complaints are managed efficiently and courteously.
- B3.5.4** Group and tour bookings are managed effectively.
- B3.5.5** Facilities for visitors are safe, comfortable and pleasant.

CMP Evidence

The above benchmarks should be incorporated into the Visitor Services Policy, which is required in A2.2. There is no specific CMP evidence required for B3.5.

Standard B3.5: Tips & Resources

Visitor Services Policy

Museums are required to have a written Visitor Services Policy, which covers:

- management of tours and bookings, including cancellation procedures
- marketing and promotion
- managing enquiries and requests for access to the collection and research files
- visitor orientation, opening and closing hours, recording visitor numbers and visitor types
- museum security procedures
- visitor access; visitor facilities and safety
- sale of merchandise and other financial transactions
- management of events
- key information about the museum, its policies, programs and services
- recording and reporting accidents and incidents
- emergency and evacuation procedures
- responding to visitor complaints

These procedures are essential if the museum wishes to join the National Tourism Accreditation Program.

The Visitor Services Policy and related procedures should be readily available for museum workers, especially those rostered on for opening and enquiries duties. See also A2.2.

Visitor facilities

Visitor facilities might include:

- adequate lighting, heating and cooling
- cloak room
- eating areas
- lockers
- parents' room
- seating
- toilet facilities or directions to the closest facilities
- well-planned public spaces

Books and online publications

Museums Australia, *Museum Methods*, 2002

DCITA, *Tourism with Integrity: best practice strategies for cultural and heritage organisations in the tourism industry*, 1999, at www.collectionsaustralia.net.au

Accessible Arts, *Access Audit*, at www.aarts.net.au

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Visitor Services Policy*

Websites

National Tourism Accreditation Program

www.tourismaccreditation.com.au

Standard B3.6

The museum's public programs are as accessible as possible to people of all ages and abilities.

Benchmarks

- B3.6.1** There are regular evaluations to check the accessibility of the museum's public programs to people of all ages and abilities.
- B3.6.2** Informed, appropriate strategies are used to overcome any access limitations for young children, older people, people with disabilities, and people with special needs.

CMP Evidence

R & A Explanation of what the museum is doing to be accessible to a range of people



A Copy of a completed Access Audit



Standard B3.6: Tips & Resources

Access

Access is often thought about only in terms of physical accessibility, but it is also about:

- sensory accessibility
- intellectual access
- cultural access, including language
- emotional and attitudinal access
- timing of opening hours
- economic considerations, such as cost of entry

Museums are encouraged to seek advice from relevant community organisations or government agencies.

Access audit

There are methods and materials available to assist museums to conduct an access audit of the museum's site and programs.

Accredited museums are required to complete an access audit. The audit template to use is *Venue Access Audit*, available in the resources section on the Accessible Arts website.

Identifying ways to improve visitor access and putting them into place can be included in the museum's Forward Plan.

Books and online publications

Accessible Arts, *Venue Access Audit*, at www.aarts.net.au

Accessible Arts, *Exhibition Design*, at www.aarts.net.au

Museums & Galleries NSW, *Introduction to Access*, at www.mgnsw.org.au

N Wyatt-Spratt et al, *Access All Areas*, 1999, at www.australiacouncil.gov.au

Websites

W3C, Web Accessibility Initiative (WAI)

www.w3.org/WAI/

Part C: Developing a Significant Collection

Principle C1: The museum's collection represents the significant stories and interests of its diverse and changing communities.

Standard C1.1

The museum develops its collection to reflect its unique purpose and the significant stories and interests of its diverse and changing communities.

Benchmarks

c1.1.1 Key collection areas are based on the museum's Statement of Purpose, key topics, themes and stories, and the communities it serves.

c1.1.2 The collection policy and procedures explain procedures and criteria with regard to:

- access
- acquisitions
- cataloguing
- conservation
- copyright issues
- deaccessioning
- disposal
- documentation
- loans
- oral history
- resource, education or secondary collections
- storage

CMP Evidence

R & A Copy of museum's Collection Policy and associated procedures, consisting of sections on:

- acquisitions
- cataloguing
- loans
- deaccessioning and disposal
- preventive conservation
- collection access



Standard C1.1: Tips & Resources

Collection purpose

Good museum collections are those that are put together with meaning and purpose, rather than those that are created and allowed to grow in an undirected way.

The museum's collections should reflect the focus of the museum. For CMP museums, the museum's focus should be determined by the particular aspects of South Australian history that are relevant to the locality or speciality of the museum.

Museums that have a clear focus are able to direct their collecting efforts to develop and manage sustainable collections that add meaning to the locality they are located in or, in the case of specialist museums, to a particular theme or subject matter.

Key collection areas

An outline of the museum's key collection areas might appear in the acquisition section of the museum's Collection Policy. Key collection areas should reflect or complement the museum's Statement of Purpose and/or Mission Statement and the history and culture of the diverse local communities (including Indigenous and culturally and linguistically diverse communities) the museum represents.

Collection Policy and associated procedures

All museums registered or accredited in the Community Museums Program are required to have a written Collection Policy.

The Collection Policy is an important guiding framework that outlines the museum's approaches to collecting and managing its collection. Collection procedures detail the specific steps that are taken to effectively manage and care for the collection.

The Collection Policy should fit in with the museum's

- **Constitution (if one is required)**
- **Mission Statement**
- **Forward Plan**

The Collection Policy and associated procedures are important tools in helping museums to:

- undertake collection management tasks in a coordinated and consistent way
- ensure that museum workers follow appropriate and accepted methods when working with the collection
- ensure a smooth succession from committee to committee

It is recommended that museums use the History Trust's *Collection Policy: guidelines to writing*, when drafting the Collection Policy.

Standard C1.1: Tips & Resources (continued)

Collection Policy for registered and accredited museums

Registered and accredited museums must include in their Collection Policy sections on:

- acquisitions
- cataloguing
- loans
- preventive conservation
- deaccessioning and disposal
- collection access

It can be useful to cross-reference sections within the Collection Policy, such as preventive conservation and deaccessioning and disposal, with other museum management documents, such as codes of ethics.

Acquisitions

Acquisition is the process of obtaining legal possession of an item for the museum's collection. Acquisition can be made by donation, purchase, bequest, exchange or transfer.

Guidelines for managing this acquisition process should include:

- reference to the museum's key collecting areas or focus and purpose of the museum
- the specific objects or types of objects the museum collects
- collecting criteria
- collecting process, including authority to collect
- collecting procedures for tasks such as processing donations

Acquisition guidelines can also define the museum's 'core' and 'non-core' collections. Non-core collections can also be known as resource, education or secondary collections.

The museum's core collection consists of the items that have clear significance to the museum's key collecting areas and collecting criteria. Often, items that are examples of 'the type that would have been used' are also included in the museum's core collection.

Museums may also maintain a non-core collection consisting of items that are duplicates, items that lack specific provenance, or are used by the museum as display props, spare parts or for 'hands-on' activities.

A clear distinction between core and non-core collection items can be important when working with collections, especially when cataloguing and caring for collections.

Some collections will develop at different rates. For instance the nature of some bequests, sub-collections and 'closed collections' (such as those of house museums) may mean that little or no new material is ever added.

Standard C1.1: Tips & Resources (continued)

Other collection areas may require an active program to address gaps; for instance, time periods, local groups, themes and stories that are under-represented in the collection.

Registration and cataloguing

Registration and cataloguing are sometimes referred to as 'accessioning', or as 'documenting' the collection, that is, creating written records about the collection and items contained therein.

Registration is the first step in the process of entering items into the collection records system. It includes assigning unique identifying numbers to items according to an agreed, standard system, and recording key information such as the name of an item and donor or source.

Cataloguing is a systematic process for recording all known information about collection items. There should be one catalogue record for each item or, if relevant, group of items.

The museum's registration and cataloguing procedures should set out:

- steps to follow to register and catalogue items into the museum's records system
- the museum's numbering system
- how to number items with more than one part
- what items should or should not be catalogued (core and non-core items)
- information on how to fill in the fields on the catalogue sheet (hard copy and/or electronic); including how to describe, measure and photograph items, how to report on the condition of items, how to record the history and context of items (provenance), how to write statements of significance, assign keywords (subject areas) and record the location of items
- appropriate techniques for physically numbering items
- instructions for entering information onto a collection database, if relevant, or for correctly filing hard copies of catalogue sheets
- back-up procedures

It is good practice for museums to:

- register items as soon as they come into the collection
- have an ongoing cataloguing program
- ensure cataloguers have appropriate skills and knowledge

Standard C1.1: Tips & Resources (continued)

Information about numbering systems, catalogue record fields and collection documentation that may be useful in developing the museum's registration and cataloguing procedures is covered in C1.4.

Loans: inward and outward

It is useful for museums to have systems in place for managing both inward and outward loans, even if loan activity is irregular or infrequent.

Loans should be for short and defined periods of time and for specific purposes, such as for displays.

Museums in general do not accept items on loan as a convenience for or favour to the lender. Items on long-term loan to the museum can be problematic because the museum has responsibility for items without the benefits of ownership.

Procedures for inward loans should set out:

- under what circumstances items may be borrowed
- from whom items may be borrowed
- the museum's obligations to care for borrowed items

Procedures for outward loans should set out:

- under what circumstances items may be lent
- to whom the museum will lend items from the collection
- restrictions on lending out particular museum items
- the obligations on the borrower to care for items

Inward and outward loans should be documented in a Loan Agreement. Loan agreements need to:

- record contact details of the lender/borrower
- specify the purpose and defined period of loan
- record details of the loan items, including condition and agreed value
- record method of transportation, delivery and return
- specify obligations regarding the care of items lent/borrowed
- specify any conditions/restrictions on the loan

Deaccessioning and disposal

All museums will from time to time want to de-register and remove items from the collection.

The process of permanently de-registering objects from a museum's collection is called deaccessioning. Disposal is the physical removal of deaccessioned items from the collection. Deaccessioning and disposal are a part of developing and managing collections. Deaccessioning should not be based upon fashions or fads, or financial considerations. The process should be cautious, scrupulous and be made available to the public.

Standard C1.1: Tips & Resources (continued)

Museums need to set out in the Collection Policy:

- criteria for deaccessioning
- ethical means of disposal
- how the deaccessioning process will be managed
- how deaccessioning and disposal of items is recorded

A museum planning to deaccession an item that was donated or bequeathed should begin the process by offering it back to the donor or donor's heirs (if they can be contacted). This applies whether the item was catalogued into the collection or not.

If the museum purchased an item or group of items, it is not beholden to any other party in the deaccessioning and disposal process.

It is sensible for a museum to consider deaccessioning if:

- the item is not relevant to the purposes of the museum (that is, it is not significant)
- the item has deteriorated beyond practical preservation or restoration
- the item lacks historical authenticity
- the item lacks physical integrity or completeness
- there is a better or duplicate example available
- the item cannot be stored adequately because of ongoing storage needs or costs
- there is an alternative or more appropriate custodian for the item
- or, in extraordinary cases, for compassionate reasons

Suitable methods for disposal of deaccessioned items are:

- return to donor or donor's heirs (if they can be contacted)
- transfer to another collecting institution
- exchange
- sale (negotiated, private, public auction, sealed or open bid)
- transfer to the museum's non-core collection
- destruction

Deaccessioned items should not be lent, given or sold to museum committee members, or volunteers or their immediate families.

It is usual practice for any funds raised from the sale of deaccessioned items to be used for collection management work or to acquire further items.

Preventive conservation

The preventive conservation section of the Collection Policy sets out the museum's strategy (intentions and practices) for preventing deterioration of collection items on display and in storage.

Standard C1.1: Tips & Resources (continued)

A preventive conservation strategy includes:

- managing the museum's environmental conditions, by controlling light, dust, air circulation, temperature and relative humidity
- undertaking pest inspections and pest management activities
- using suitable display, storage and labelling methods and materials
- appropriate handling of collection items
- appropriate housekeeping practices, such as cleaning of items and storage and display spaces
- using conservators for interventive work on collection items
- undertaking skills development and referring to museum resources on caring for collections

Refer also to C2.1, C2.2 and C2.3 when developing the preventive conservation section of the Collection Policy.

Collection access

Collection access is about making the collection (including photographs) and its records available to the widest possible range of people, physically and/or virtually, within the constraints of the museum's other responsibilities for the preservation and security of the collection.

Access is usually given for information, enjoyment, research and study.

Displaying and interpreting collection items are two common forms of access. When making the collection and collection records accessible in ways other than display and interpretation, a museum should consider:

- who may have access to the collection and associated records
- form/s of access, e.g. reproduction, viewing
- fees and charges for services
- restrictions, e.g. for cultural reasons or the fragile condition of an item
- retaining information about users of the collection
- copyright and privacy

Copyright is an important issue to consider in terms of access to and use of collection items, especially photographic or pictorial material. It is desirable for museums to:

- hold copyright for collection material, or
- have written permission to reproduce the material from the copyright holders

Standard C1.1: Tips & Resources (continued)

Copyright becomes an issue when a museum:

- requests copies of collection items or pictorial material for its own purposes
- becomes involved in supplying copies to others

In practical terms this can affect activities such as reproducing images for the museum's own publications, such as books, postcards or brochures; or handling requests from researchers and other organisations for similar purposes.

Museums need to have procedures in place to:

- gain copyright, or obtain written permission to reproduce item/s from the copyright owner, at the time donations are made
- identify and record details of copyright owners
- inform members of the public about the copyright status of an item or pictorial material, at the time a request for copying is made; and, if the museum is not the copyright owner, provide them with the name/s of the likely copyright holder
- inform members of the public about any fees and charges for copying and provide them with the correct wording for any acknowledgement

Documentation

Documentation refers to the whole body of information about the museum's collection. It includes the catalogue records, records of the museum's non-core items, loan records, donation forms, reproduction and oral history permission forms, object/artist files, and other records that may be created in the course of managing the museum's collection.

Oral history

Conducting oral history interviews requires specialised skills and techniques. It is well worth including a section in the Collection Policy about planning and conducting oral history projects, paying particular attention to copyright, access and reproduction.

Books and online publications

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Collection Policy; a guide to writing*
- *Pictorial Material Donation and Reproduction form: example*

Museums & Galleries NSW, *Collections Policy Template and Rethinking the Collection: Collection Policy Explanatory Notes*, 2006, at www.mgnsw.org.au

B Robertson, *Oral History Handbook*, 5th edition, Oral History Assoc (SA Branch), 2006

Museums Australia, *Museum Methods*, 2002

Websites

Australian Copyright Council

www.copyright.org.au






Standard C1.2

The museum knows the significance of its collection.

Benchmarks

- c1.2.1** Decisions about acquisitions, deaccessioning and care of the collection are informed by significance assessments.
- c1.2.2** The significance of selected individual collection items is investigated and documented.

CMP Evidence

R & A	Examples of cataloguing sheets or database entries where the significance of a collection item has been recorded	
R & A	Object and/or research files for at least some key collection items	
R	Copy of completed collection summary form	
A	Copy of museum's formal significance assessment of its collection	
A	Example of a project the museum has completed or is undertaking that demonstrates the application of significance to its management of the collection	

Standard C1.2: Tips & Resources

How does a museum know the significance of its collection?

For history museums, the significance of the collection or individual collection items will relate to the historical context of the museum's locality or speciality. This means that a particular collection item may be very significant in the context of one museum collection, but not significant in the context of another.

Significance can be determined either informally or formally. A general comparison of the museum's collection against its Statement of Purpose is a suitable way to do an informal significance assessment. Determining if items are 'core' or 'non-core' is another form of assigning significance.

For more formal assessment there is established methodology for determining the significance of a collection or individual collection items. The essential reference publication is: *Significance: a guide to assessing the significance of cultural heritage objects and collections*, by the former Heritage Collections Council. This publication includes examples of significance statements for a variety of objects or groups of objects.

For registration and accreditation CMP museums are required to provide examples of catalogue record sheets or database records that show how the significance of items has been recorded.

What makes an item or collection significant is explained in B2.1.

Significance assessments and statements of significance

Statements of significance make a case for why a particular item or group of items has been acquired or kept by the museum. They may be a single sentence or more detailed.

Statements of significance can be prepared for individual collection items, an entire collection or sections of a collection.

The significance of historical items derives from their provenance, or origin and history of use, so it is important to obtain as much information as possible at the time the items are acquired for the collection.

B2.1 also deals with significance.

Standard C1.2: Tips & Resources (continued)

Collection summary

For CMP registration, a museum is required to complete a Collection Summary form, which acts as a prompt to articulate the overall significance of the museum collection and/or groups of items.

The Collection Summary form asks:

- what groupings of items the museum has acquired
- how relevant each group of items is to the stated purpose of the museum
- what the museum believes are the strengths of its collection
- what gaps in the collection the museum has identified
- what the museum considers to be its 'top 10' most significant items or groups of items

How can a museum apply knowledge of significance?

Significance can be used to guide all collecting activities, including:

- acquisitions
- cataloguing
- determining conservation priorities and planning interventive conservation work
- prioritising storage and display needs
- deaccessioning
- planning displays
- digitisation projects

Documenting significance

It is useful to record statements of significance for individual collection items on catalogue sheets or database records.

One way to gather research information about collection items is to create object files, preferably at the time of acquisition, to which research information is then progressively added. This material is very valuable when preparing an item's statement of significance.

It is useful to date significance assessments because the significance of a collection and particular items can increase or diminish over time. Significance statements should be updated as new information becomes available.

Standard C1.2: Tips & Resources (continued)

Significance projects

Museums seeking accreditation in the Community Museums Program are required to demonstrate the application of significance to its collecting activities.

Some ways of demonstrating this are:

- development of a conservation plan for a significant item
- development of a storage project or display renewal project
- compilation of a list of items for deaccessioning and disposal
- documentation showing how significance is taken into account when accepting items or groups of items into the collection
- planning a display that will use significant objects and highlight important historical themes
- undertaking a digitisation project for significant photographs or documents
- undertaking a cataloguing or research project

Books and online publications

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Collection Summary Form*

The essential publication for all museums on significance is:

Heritage Collections Council, *Significance, A guide to assessing the significance of cultural heritage objects and collections*, 2001, at www.collectionsaustralia.net.au

Websites

Information about a forthcoming second edition of *Significance* and an e-learning module about writing statements of significance

www.collectionscouncil.com.au





Standard C1.3

The museum aims to have unconditional legal ownership of its collection.

Benchmarks

- c1.3.1 Records are kept of the transactions accompanying each acquisition.
- c1.3.2 Donors must sign donation forms.
- c1.3.3 If the museum does not have unconditional ownership of a collection item, it has a plan in place to gain title to it or an appropriate written agreement that is reviewed regularly.

CMP Evidence

R & A	Records of acquisition transactions	
R & A	Sample of museum's current donation form	
R	Copy of statement outlining any ownership issues relating to the collection.	
A	Statement outlining strategy to gain legal title to items in the collection	

Standard C1.3: Tips & Resources

Acquisition transactions

It is important for museums to accurately record all acquisition transactions, whether items are acquired by donation, purchase, bequest, transfer or exchange.

Donation forms, donation receipt books, purchase receipts and correspondence or other paperwork documenting bequests, exchanges, or transfer of items from one organisation to another are all forms of records of acquisition transactions.

Donation forms

All items donated to the museum should be recorded on an appropriate donation form that is signed by both the donor and museum representative.

Signed donation forms are:

- an essential record of the transfer of legal title of items from donors to museums
- useful for collecting important information about donors

Donation forms should:

- contain clauses compliant with copyright and privacy requirements
- make it clear to donors that in making a donation they are transferring legal title for the item/s to the museum and that the museum can do with these item/s as it sees fit
- be signed by both parties

Legal title

Legal title means that a museum has unconditional ownership of its collection. In special circumstances, some items may need to be co-managed by the museum and a community group, meaning that legal title cannot be transferred to the museum.

Unconditional ownership of the collection is important for:

- allocating resources
- planning long-term collection development
- planning displays
- prioritising collection care activities
- ensuring long-term preservation

A museum that owns its collection is able to make all decisions affecting the collection.

It is common for museums to have acquired some items without signed donation forms and it is recommended that legal title be sought retrospectively, where it is possible to do so.

It is also recommended that museums seek to have items on long-term inward loan (often referred to as 'permanent loan') donated to the museum instead. Alternatively, return the items to the legal owners.

Standard C1.3: Tips & Resources (continued)

Ownership issues and strategy

The intention to gain legal ownership of items, or details of special arrangements for co-managed collection items, should be included in the acquisitions and loans sections of the museum's Collection Policy and/or in the Forward Plan.

Two common ownership issues for community museums are:

- long-term loans (often called 'permanent loans')
- lack of paperwork clearly indicating ownership of collection items

Museums seeking CMP registration or accreditation are required to provide a statement outlining any issues relating to ownership of collection items in their care. The statement needs to outline:

- the proportion of collection items, including objects, photographs and documents, that the museum has ownership of and how this ownership is documented
- the proportion of collection items, including objects, photographs and documents, for which the museum does not have documented ownership
- any other issues relating to collection ownership

Other issues may be:

- collection co-management arrangements between the museum and another group
- arrangements with other groups for the housing of their collection on the museum's premises, or the housing of the museum's collection on another group's premises
- arrangements for collection items stored in private homes
- offers of items to the museum as long-term loans

If all items in the museum's collection are owned by the museum, a statement to that effect is all that is required.

Accredited museums are required to have a strategy in place to gain legal title to any relevant collection items for which they do not have documented ownership.

Suggested strategies are:

- asking owners of items on loan to the museum to donate the items to the museum
- returning items on long-term loan to owners who do not wish to transfer ownership to the museum
- formalising earlier donations using a donation form

Books and online publications

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Donation form: example*

Museums and Galleries NSW, *Fact Sheet: Acquisition*, at www.mgnsw.org.au

Standard C1.4

The museum has an effective system to record and retrieve information about its collection.

Benchmarks

- C1.4.1 The paper, electronic or digital collection documentation system includes:
- an accession register (including a unique numbering system)
 - a catalogue (including a minimum data set and an agreed nomenclature)
 - object or artist files (research notes, newspaper clippings, significance assessments)
- C1.4 Records of the collection are safely stored and back-up copies are made at regular intervals.

CMP Evidence

R & A Explanation of museum's collection documentation system and work program



A Demonstration that the cataloguing of the collections is substantially complete.



A Demonstration that a suitable, commercially available collection management database is in use



Standard C1.4: Tips & Resources

Collection documentation system

Collection documentation is also referred to as accessioning. A collection documentation system covers:

- registration
- cataloguing
- object files
- cataloguing work program
- use of collection database
- backing-up records

Some of these 'system requirements' will already be covered in the cataloguing section of the museum's Collection Policy. See C1.1.

All CMP museums need an established system in place to ensure that collection documentation is done consistently and well, and existing records are maintained.

For accreditation, it is expected that museums will:

- have substantially catalogued their collections
- be using a suitable commercially available collection management database

Collection registration

Registering collection items is the most fundamental form of collection record keeping.

It is usual for museums to maintain a Register, the purpose of which is to:

- record basic information about each object
- allocate each item or group of items a unique identifying registration number

The Register can be in hard copy (e.g. in a hard-cover register book), or it can be maintained electronically as a simple database or spreadsheet.

The following information should be recorded in a Register:

- registration number
- registration date
- object name
- source
- donation number (if relevant)
- notes
- registered by
- date when full cataloguing has been completed (often different from the registration date)

Registration numbering system

It is important for all collection items to have a unique identifying number, called a registration number.

Most museums use an alpha-numeric (letters followed by numbers) system for registering and labelling (physically applying the number) collection items.

Standard C1.4: Tips & Resources (continued)

Two widely used formats are:

- Museum Initials, followed by the Year in Full, followed by the Object Number e.g. HTSA.2008.093
- Museum Initials followed by the Object Number e.g. HTSA.094

Whatever numbering system is chosen, it should be applied consistently throughout the museum's collection.

Cataloguing

Catalogue record sheets (often called Object Record Sheets) should be compiled for all items in the museum's core collection. They can be completed in hard copy or electronic form.

The museum's cataloguing procedure should specify the 'data fields' of information that should be recorded about each object. Fundamental data fields for cataloguing are:

- object name
- registration number
- donation number
- source
- condition
- date of manufacture
- materials
- dimensions
- description
- history/provenance
- significance
- subject areas (or keywords)
- notes
- current location
- catalogued by
- date

Another option is to use 'Object ID', which is a set of 20 data fields recognised by Interpol.

Cataloguing work program

It is good practice for museums to maintain a regular program of cataloguing collection items, and to ensure that at least two museum workers are familiar with the cataloguing process and use of the collection database (if a database is in use).

Object files

Creating files for collection items is a useful way of organising and storing additional information about items that may assist with their future use and interpretation in displays, or with further research.

It is not expected that files will be maintained for all collection items. However, it is recommended that files be established for key collection items and/or major collection groupings.

Standard C1.4: Tips & Resources (continued)

Back-up copies

Collection records should be kept at the museum and a copy held off-site (whether hard copy or electronic).

Remember to save changes when they are entered into the database.

Electronic back-up copies need to be regularly updated, even if no new records have been added, so that the files are properly maintained.

Databases

A collection database needs the following characteristics:

- searchability
- unlimited field lengths
- ability to attach images
- availability of software upgrades

Museums are advised to use commercially available specialist collection management software, which can be readily updated, rather than creating an in-house database.

Accredited museums are required to use a suitable commercially available collection management database.

Use of a collection management database is not a requirement for registration.

Books and online publications

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Cataloguing collections*

Museums & Galleries NSW, Fact Sheet: *Cataloguing*, at www.mgnsw.org.au

Collections Australia Network, *Planning and Implementing a Collection Management System*, 2005, and *Thesauri and Vocabularies for Cataloguing*, at www.collectionsaustralia.net.au

State Library of New South Wales, *Australian Pictorial Thesaurus*, 2000

Australian Society of Archivists, *Keeping Archives*, 3rd edition, 2008

National Archives of Australia, *Keep it for the Future: How to set up small community archives*, 2007

Websites

Interpol Object ID

www.object-id.com

Standard C1.5

The museum makes its collection accessible in digital formats and in online environments, as resources permit.

Benchmarks

- C1.5.1 Digital collections are created and maintained using recognised principles and standards.
- C1.5.2 Digital collections are managed in keeping with the standards, procedures, policies and records management systems used for the museum's other collections.
- C1.5.3 Legal requirements are addressed, along with ethical and other protocols, before any digitisation process begins.
- C1.5.4 Digital collections are managed with sufficient accompanying information, in relevant formats, to allow for continuing access, future re-use and ongoing preservation.
- C1.5.5 Digitisation procedures are designed and managed so as to minimise the risk of damage to collection items.
- C1.5.6 Digital collections are presented to the public in ways that meet accessibility standards and are compatible with adaptive technologies.

CMP Evidence

R & A Copy of guidelines the museum uses for undertaking digitisation projects, if applicable



A Demonstration and/or documentation of a completed or planned digitisation project that has been/will be conducted according to the above benchmarks



Standard C1.5: Tips & Resources

Digital formats

Digitisation is the process of creating a reproduction of an existing physical object in the form of an electronic file, which can be stored and accessed using a computer and viewed on a computer monitor.

Digital collections may include materials that are either 'born digital' or 'made digital' by the process of digitisation. 'Born digital' materials include images originally taken on a digital camera.

Images of two-dimensional items are generally captured for digitisation by scanning. A digital camera can be used to capture digital images of three-dimensional items.

Digitisation guidelines

Guidelines for digitisation projects should be developed before the museum commences any digitisation activities. Digitisation activities include making digital copies of items for use in displays or for attaching to records in a collections database.

Guidelines need to cover procedures for:

- creating records
- maintaining records
- legal requirements
- ethics
- retention of accompanying information
- minimising damage
- access

When planning a digitisation project it is important to consider:

- the number of items to be digitised
- the type of items to be digitised
- equipment to be used (scanner or camera)
- handling and preservation issues while items are being digitised
- how digital image files will be stored
- how digital image files will be maintained and migrated to new formats
- how work will be managed (in-house or out-sourced)

Currently there are no formally approved national or international standards that dictate how digital images should be scanned for longevity.

Standards and technologies are constantly evolving and information can become obsolete very quickly. The State Library of South Australia's Preservation Reformatting section can provide up-to-date advice about standards and available technologies.

Standard C1.5: Tips & Resources (continued)

Legal requirements and protocols

Legal requirements include:

- privacy
- copyright
- intellectual property rights
- moral rights

Protocols may relate to:

- ethics
- culture-specific sensitivities
- rights management

Accompanying information

The accompanying information may include:

- captioning
- acknowledgements
- metadata
- permissions and restrictions (associated with rights management)

Minimising damage

It may be useful to develop digitisation procedures that specify suitable methods of digitisation for different collection types. This helps to ensure that sound handling practices are observed when undertaking digitisation projects.

Accessibility

Accessibility in the online environment is about making sure information is presented in ways that take into account the different abilities, requirements and technology people will have.

Access is often only thought about in terms of physical accessibility, but it is also about:

- sensory accessibility
- intellectual access
- cultural access
- emotional and attitudinal access

Digitisation policy or guidelines

CMP registered and accredited museums are required to develop guidelines for undertaking digitisation projects, which take into account all of the issues above, if they are embarking on any digitisation projects. Museums must also be able to demonstrate that they have followed these guidelines in the implementation of the project.

Standard C1.5: Tips & Resources (continued)

Books and online publications

Accessible Arts, *Print and Publication*, at www.aarts.net.au

World Wide Web Consortium (W3C), *Web Content Accessibility Guidelines*, at www.w3.org/

Collections Australia Network, *Capture Your Collections: a digitisation course for remote and regional museums and galleries* and *Copyright and Intellectual Property*, at www.collectionsaustralia.net

Collections Council of Australia, *Principles for Creating and Managing Digital Heritage Collections*, 2007, at www.collectionscouncil.com.au

State Library of Victoria, *Image Digitisation of Local History Collections*, 2002

UNESCO, *Guidelines for the Preservation of Digital Heritage*, 2003

Websites

National Archives of Australia www.nla.gov.au

Arts Law Centre of Australia www.artslaw.com.au

Aboriginal and Torres Strait Islander Library and Information resource Network (ATSILIRN) Protocols www.aiatisis.gov.au

Other advice

State Library of South Australia Preservation Reformatting section: phone 8207 7327 or email bohrnsen.lindy@slsa.sa.gov.au

Part C: Developing a Significant Collection

*Principle C2: The museum preserves its significant collections
for future generations.*




Standard C2.1

The museum makes decisions on preventive conservation based on current conservation advice and practices.

Benchmarks

- c2.1.1 Preventive conservation principles are reflected in the museum's policies and procedures.
- c2.1.2 A preventive conservation strategy is in place.
- c2.1.3 The preventive conservation strategy is based on reputable museum conservation information and advice.
- c2.1.4 Preventive conservation guidelines and training are readily available to all museum workers.

CMP Evidence

R & A	Examples of how the museum has applied preventive conservation strategies identified in the Collection Policy	
R & A	Copies of key preventive conservation reference materials on hand	
A	Copy of preservation study prepared or updated within the last 5 years	

Standard C2.1: Tips & Resources

Preventive conservation principles

Conservation is an integral part of all museum activities, policies and procedures. It relates to:

- building works
- exhibitions
- public programs

Preventive conservation principles cover museum activities, policies and procedures which aim to prevent the deterioration of collection items on display and in storage. These principles include:

- maintaining items in a stable condition
- respecting the significance, physical integrity and historical authenticity of items
- using appropriate conservation techniques and materials
- recording preventive conservation decisions and activities

The terms, **conservation**, **restoration** and **preservation**, are commonly used to describe conservation activities in museums. Each of these terms describes different approaches to caring for collection items. It is useful to understand the meaning and application of these terms when developing the museum's preventive conservation strategy.

Preventive conservation strategy

A preventive conservation strategy outlines the museum's intentions and practices to preserve the collection. It is, therefore, an important section in the museum's Collection Policy. It puts the above principles into practice, by identifying:

- specific preventive conservation needs and priorities
- specific steps to be taken regarding those needs and priorities
- resources required
- who is responsible
- a timetable for implementing the strategy

A preventive conservation strategy is informed by an initial assessment of risks that might affect the long-term preservation of the collection, and by an understanding of the significance of the collection, and might include:

- measures to reduce light levels on light sensitive collection items
- appropriate cleaning techniques and schedule for display and storage areas
- regular inspections for damp and pests, dust and pollutants

Standard C2.1: Tips & Resources (continued)

- shelter for significant outdoor exhibits, where appropriate
- an integrated pest management (IPM) program
- procedures for dealing with mould or pest infestations
- budgeting for archival storage materials or storage improvements
- OHS&W issues

It can be useful to consider the broader museum setting and interpretive purpose, too. For instance, if reduced light levels are desirable for some display items, what strategies might be put in place to ensure that visitors can easily read storyboards and labels?

Applying preventive conservation practices

Examples of preventive conservation practices include:

- addressing a pest problem identified through an IPM program
- re-organising a display area to remove sensitive items from sunlight
- making padded hangers to hang costume items in storage
- making book supports for books on display
- undertaking a project to digitally copy original photographs on display, store originals and display the copies

Reviewing the museum's preventive conservation strategy

Regularly reviewing the museum's preventive conservation strategy is an opportunity to review progress, make adjustments to policies and procedures and update the action list to address current needs and priorities.

Preservation study

A preservation study is a review of general conservation needs prepared by a qualified conservator for an individual museum. Preservation studies are very useful, as the priorities identified and actions recommended by the conservator can help to guide the museum's preventive conservation activities.

Preservation studies should be reviewed from time to time to ensure that they remain current.

In South Australia, conservators from Artlab Australia are generally the experts approached to conduct preservation studies.

Conservation advice

Museums can obtain preventive conservation advice by attending training workshops run by the History Trust of South Australia and/or Artlab Australia, from conservation manuals, reference books and websites, or from the museum's preservation study.

The Australian Institute for Conservation of Cultural Material (AICCM) website provides a guide to 'Finding Conservators'.

Standard C2.1: Tips & Resources (continued)

Guidelines and preventive conservation skills

The History Trust runs several short workshops on preventive conservation activities:

- handling collection items
- making display supports
- collection cleaning techniques
- storage

The History Trust strongly advises that museum workers gain some preventive conservation skills prior to the museum's assessment for registration. Doing so will assist in writing the preventive conservation section of the museum's Collection Policy, and in applying accepted preventive conservation practices prior to the site assessment for registration.

Skills development

For information see A3.3

Books and online publications

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Conservation, Restoration, Preservation: definitions*
- *Integrated pest management*

Museums Australia, *Museum Methods*, 2002

Heritage Collections Council, *reCollections*, 1998, at www.collectionsaustralia.net.au

Museums Australia (Vic), *Developing a Conservation Plan for Community Museums*, 2006

Australian Institute for Conservation of Cultural Material (AICCM), *Preservation Needs Assessment Template*, 2007-08, at www.aiccm.org.au

Websites

AICCM www.aiccm.org.au

Museums Australia www.museumsaustralia.org.au

Standard C2.2

The museum actively strives to create and maintain an appropriate and stable environment for its collection.

Benchmarks

- C2.2.1** Approaches to storage and display show appropriate understanding of the collection's condition and the environmental requirements of individual items.
- C2.2.2** The collection storage and display areas are cleaned regularly and kept tidy and free of rubbish.
- C2.2.3** Appropriate equipment and training is available to ensure that the collection is handled and moved in an appropriate manner.
- C2.2.4** Conditions in exhibition and storage areas are regularly monitored, recorded and assessed in light of the collection's conservation requirements, and damage or potential damage is reported and followed up.
- C2.2.5** Storage and display environments are improved and upgraded as resources become available, in light of ongoing assessments of the museum environment and the collection's needs.

CMP Evidence

R & A Examples of steps taken to maintain an appropriate museum environment for the collection



A Copy of museum's conservation strategy outlining a full and comprehensive program to maintain an appropriate environment/s for the collection



A Explanation of improvements to key display and storage areas in the last 5 years.



Standard C2.2: Tips & Resources

Museum environment

Environmental considerations include:

- dust and other pollutants
- light levels
- temperature and relative humidity
- pests

For CMP registration, museums are required to take basic steps to maintain an appropriate museum environment:

- using curtains/blinds on windows to control natural light
- using appropriate artificial lighting
- keeping items off the floor
- using external blinds and other passive energy techniques to maintain even temperatures
- maintaining adequate air circulation
- undertaking regular cleaning of display and storage spaces
- undertaking regular pest inspections
- using dust covers where appropriate

Accredited museums need to be undertaking a full and comprehensive program, which includes the above, and in addition:

- maintaining an active and documented cleaning and housekeeping schedule
- regularly reviewing the condition of items on display and in storage
- maintaining an active integrated pest management (IPM) program
- regularly monitoring the museum environment for temperature and relative humidity fluctuations
- allocating sufficient resources to preventive conservation activities

Condition of collections and environmental requirements

Museum collections commonly include different materials such as wood, paper, textiles and metals. Different materials have different preservation requirements, face different risks, and may require different environmental conditions.

Condition reports are a useful tool for identifying the condition and preservation needs of individual items or groups of items. Condition reports document:

- areas of damage to items
- cause of damage
- requirements for the monitoring and care of items on display or in storage

It is a good idea to assess the condition of items at the time they are catalogued, and record this information on the catalogue record (hard copy or electronic).

Condition reports can also be added to object files.

Standard C2.2: Tips & Resources (continued)

Cleaning

Regular cleaning of display and storage areas is an essential part of managing the museum environment.

Floors and doormats are a big contributor to dust problems in museums and should be cleaned regularly. Consider vacuuming or shaking out doormats every day the museum is open.

It can be useful to establish a cleaning and housekeeping program and schedule, and record activities as they are completed.

Storage

Registered and accredited museums must have a designated, suitable storage area/s.

Avoid storerooms or areas that are damp, or where dust, temperature, humidity, pests and natural light cannot be controlled.

The best rooms for storage:

- have no external walls, and/or are well-insulated
- do not contain water pipes or taps
- are well removed from kitchens and bathrooms

It is a good idea to assess storage needs at regular intervals and update storage areas and/or develop new storage areas in light of these assessments.

Storage and display conditions

Ongoing monitoring and assessment of storage and display conditions are important in ensuring that appropriate conditions are maintained.

Monitoring and assessment involves observing:

- where dust accumulates
- where light falls directly onto items on display
- where display supports are needed
- signs of deterioration in items on display, such as splitting, warping and fading
- gaps around window frames and doors
- signs of damp, mould or water damage
- signs of pest activity

Information on issues affecting specific collection items (such as particular conservation needs, or incidents such as pest infestation or water damage) can be recorded on object files and catalogue records.

For future reference, it is useful to document key events impacting on the collection (such as a leak, storm or other disaster) and add this information to records of the museum's history.

It is recommended that museums implement a regular program for conducting pest checks of display and storage areas (including within displays and within storage boxes).

Standard C2.2: Tips & Resources (continued)

Improving and maintaining the museum environment

One way to manage this is to conduct a regular audit of purposefully selected or random areas, depending on the nature of the collection and the museum's environment.

Some ways to improve and maintain sound environmental conditions are:

- using dust covers to protect items on open display, when the museum is closed
- using curtains/blinds on windows to block out sunlight
- insulating items from temperature and relative humidity fluctuations, by placing them in display cases or packing them in boxes for storage
- keeping display and storage areas clean and tidy
- keeping items off the floor
- using appropriate display supports
- having a regular maintenance schedule

If dust covers are used they need to be changed or cleaned regularly.

Sometimes changing the layout of objects on display can improve conditions for individual items. For example, moving a light sensitive item to a part of the museum where no natural light will fall on it, or moving paper-based items away from damp museum walls.

It may be appropriate to maintain different environmental conditions in different areas of the museum.

Equipment and skills development

Some special skills and training are required for undertaking preventive conservation tasks.

Museums should have on hand appropriate cleaning equipment and materials.

Handling the collection

Appropriate equipment for handling collections includes:

- boxes
- gloves
- trolleys

Museums should purchase equipment appropriate to the collection for handling and moving items.

Collection items should be handled as little as possible.

It is a good idea to label items that have been wrapped or boxed for storage on the outside of packaging so that they are easily identified. A photograph is also useful in identifying wrapped or boxed items without needing to unpack and handle them.

Standard C2.2: Tips & Resources (continued)

Books and online publications

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Cleaning in museums*
- *Housekeeping schedule*
- *Museum environment*
- *Storage and handling*

Museums & Galleries NSW, Fact Sheet: *Cleaning Regime*, at www.mgnsw.org.au

Museums & Galleries NSW, Fact Sheet: *Housekeeping*, at www.mgnsw.org.au

Museums Australia, *Museum Methods*, 2002

Heritage Collections Council, *reCollections*, 1998, at www.collectionsaustralia.net.au

The National Trust (UK), *The Manual of Housekeeping*, 2005

Standard C2.3

The museum's display, storage and handling methods minimise risks to its collection.

Benchmarks

- c2.3.1** Appropriate supports, display materials and techniques are used for collection items on display.
- c2.3.2** Appropriate methods and materials are used for collection storage.
- c2.3.3** Archival-quality materials are used for storage and display where appropriate and wherever possible.
- c2.3.4** Collection items are rotated on and off display in accordance with their conservation needs.

CMP Evidence

R & A Examples of steps taken to apply and use appropriate display support materials and methods



R & A Examples of steps taken to apply and use appropriate storage materials and methods



Standard C2.3: Tips & Resources

Display materials and methods

The way that collection items are displayed can have a dramatic effect on their long-term preservation. It is important to understand and know how to use appropriate display materials and methods.

Good display techniques are important because they

- prevent damage to collection items on display
- show donors and visitors that the museum cares for its collection
- complement good story-telling and other preventive conservation practices (cleaning, IPM, disaster planning)

CMP museums should aim to use display techniques that do not cause items to deteriorate.

Practices to avoid include:

- using pins, thumbtacks, staples, Blu-tac, rubber bands, sticky tape, Velcro dots and strips, sharp wire, glues or adhesives in direct contact with display items
- displaying documents and books without appropriate support
- displaying costume on wire hangers
- displaying costume and textiles with sharp folds and creases
- placing items overlapping each other, without a suitable barrier between them
- placing items on the floor
- using inappropriate display cases and mannequins
- crowding display cases with too many objects

Archival quality materials for making display supports include:

- acid-free boards and papers
- colourfast synthetic, calico or cotton fabrics
- dacron padding
- tyvek
- double-sided acid-free tape
- mylar (polypropylene plastic film)

Suitable display methods include:

- padded hangers and display forms
- supports for books and other items
- mylar/polypropylene sleeves or encapsulations

It is essential prior to the CMP site assessment for registration or accreditation to systematically review the display techniques used in the museum and make appropriate changes. The History Trust can give advice as to the suitability of display techniques, make suggestions for improvements, and provide skills development.

Standard C2.3: Tips & Resources (continued)

Applying display support materials and methods

For CMP registration museums need to demonstrate basic application of appropriate display support materials and methods. Some examples are:

- avoiding the use of pins, tacks and adhesives in direct contact with original items
- use of appropriate display cases for display of fragile items
- identification of items at risk from long-term display
- identification of items requiring display supports
- use of suitable materials for display supports

In addition, for CMP accreditation it is expected that:

- a formal display review has been done, noting
 - specific items at risk from long-term display
 - specific items requiring display supports
 - specific items requiring time in storage
 - actions, resources and timeline for undertaking identified tasks
- all original items on display that require a display support have a suitable support made for them
- appropriate display techniques are used throughout the museum
- at least two museum workers know how to make appropriate display supports

Applying storage methods and materials

For registration museums need to demonstrate basic application of appropriate storage materials and methods. Some examples are:

- having a dedicated collection storage area/s
- stocking and using archival materials, such as acid-free boxes and tissue

In addition, for accreditation it is expected that:

- the museum has at least one dedicated collection storeroom that is appropriately fitted out
- items in storage are packed, using archival materials and appropriate methods
- the museum can explain the process for rotating collection items between display and storage

Identifying display risks

Typically, items at risk from long-term display include:

- photographs, documents, books displayed open, and other paper-based items that are susceptible to fading
- costume and textiles that are susceptible to fading, stress damage and insect activity

Standard C2.3: Tips & Resources (continued)

- items located against damp or exterior walls
- items on open display

Identifying items at risk from long-term display is the first step in establishing a program for rotating items between display and storage.

Formal display review process

Undertaking a review of the museum's current displays is a useful way of demonstrating knowledge and application of display methods. Documenting outcomes of a review can provide a written plan for action.

A display review can be conducted by looking critically at:

- how items are displayed
- how many items are on display
- whether display methods are appropriate to the preservation needs of the items
- whether items are relevant to the display themes or historical messages
- whether there are items that need to be stored for a period of time, or copied for ongoing display

Storage methods

Appropriate storage may include:

- boxes
- map and filing cabinets
- shelving
- pallets

Methods include:

- ensuring items are not stored directly on the floor
- using dust covers for larger items
- using supports for fragile items
- wrapping and boxing items
- lining storage boxes and shelves

CMP museums should aim to use archival quality storage materials, including wrapping and padding materials, storage enclosures and boxes and suitable shelving and cupboards.

Good storage includes associated documentation:

- shelf, cabinet and box lists
- movement or location records
- cross-referencing to catalogue records

It is good practice to store the most significant collection items in the best quality materials and boxes first and gradually upgrade the storage of other collection items as resources permit.

Standard C2.3: Tips & Resources (continued)

Storage management

Items in storage can be managed by:

- identifying particular storage requirements for different types of items
- having a system for recording the location of items within storage
- conducting periodic audits of items in storage

Keeping shelf, cabinet and box lists is a suitable system for recording the location of items in storage.

It is handy to have a 'storage map' that shows all the museum's collection storage areas and designated display areas.

Movement record sheets are useful for keeping track of items as they are moved between display and storage. Transfer this information to catalogue records.

Rotation of items

It is good practice to limit the amount of time some items spend on display. Light sensitive items are especially vulnerable to long-term display and should be rotated between display and storage at regular intervals.

Handling methods

Guidelines for safe handling and movement of collection items should be incorporated into the museum's preventive conservation strategy.

It is best to handle collection items as little as possible. When handling collection items:

- wear cotton or disposable surgical gloves or
- have clean hands (do not use moisturising creams)
- support items from the underneath and sides
- carry items in two hands or supported on a rigid board or tray
- carry heavy or awkward items with an appropriate number of people assisting, or with appropriate equipment, such as trolleys or forklifts
- have a clear path
- have a clear space ready for the item

Special care should be taken in handling potentially hazardous collection items, such as metal safes containing asbestos, and medicines and sharp objects.

Skills development

Skills development in preventive conservation, including handling, storage and display techniques, is a requirement of A3.3.

Standard C2.3: Tips & Resources (continued)

Archival supplies

Current lists of suppliers are available from Artlab Australia. The History Trust can also assist with contact details for a variety of archival suppliers.

Books and online publications

History Trust of South Australia CMP Help Sheets, at www.history.sa.gov.au

- *Storage and handling*
- *Display techniques and supports*

Museums Australia, *Museum Methods*, 2002

Heritage Collections Council, *reCollections*, 1998, at www.collectionsaustralia.net.au




Standard C2.4

The museum makes decisions about conservation treatments based on current conservation advice and practices.

Benchmarks

- C2.4.1** Appropriate advice is sought from qualified conservators before any conservation or restoration treatments are carried out, and any interventive conservation work on collection items is performed by qualified conservators.
- C2.4.2** The condition of any collection item requiring conservation is recorded and considered, and a treatment proposal prepared, before any interventive conservation work is carried out.
- C2.4.3** Every item selected for conservation work has a statement of significance to justify the cost of the work and to guide procedures.
- C2.4.4** Records are kept of all conservation treatments (or restoration activities), including the materials used, who carried out the treatment, and any physical changes to the object.
- C2.4.5** Suitable storage and display environments are chosen for treated collection items, with the aims of maintaining their stability, and long-term preservation.

CMP Evidence

R & A	Explanation of steps taken to plan and document any interventive conservation work	
R & A	Examples where treated collection items are suitably stored or displayed	
A	Examples of conservation plan, statement of significance and treatment records for items where interventive conservation work has been carried out	

Standard C2.4: Tips & Resources

Conservation in museums

CMP museums should aim to stabilise items in their current condition, rather than undertake any interventive work. Interventive conservation work means any activity done to items that in some way changes the item.

The practice of restoring items, such as farm machinery and vehicles, is a form of interventive conservation work.

Current conservation practice requires that any interventive conservation work is properly planned and documented.

CMP museums are expected to respect and value the physical integrity and historical authenticity of items in the collection.

Interventive conservation work

Examples of interventive conservation work are:

- specialised cleaning
- repairing broken items
- removing a photograph from a backing board
- painting
- replacing parts with other parts or making new parts
- re-upholstery

Interventive conservation work is a specialised area of expertise and special skills are required. It is generally done by trained conservators who have undergone extensive academic and practical study.

It is not recommended that museum workers undertake any interventive conservation work. However, in certain circumstances, after consultation with a conservator, it may be appropriate for museum workers to undertake limited interventive conservation work. If work is to be done in-house, it is important to:

- get appropriate advice before any work begins
- develop a conservation plan for each item to guide the work

Planning conservation work

When planning conservation work conservators consider:

- what needs to be done
- how it can be done
- who will do the work
- the cost involved
- research required
- appropriate materials
- appropriate methods
- documenting the conservation process
- future location and care of the item

Conservation advice

For museums in South Australia interventive and preventive conservation advice is available from Artlab Australia. The History Trust can also assist with enquiries about preventive conservation.

Standard C2.4: Tips & Resources (continued)

Significance assessments

A significance assessment will assist in identifying the important attributes of an item that should be considered when planning conservation work. A short, reasoned statement of significance provides a very useful reference point for future care of items, too.

When planning interventive conservation work, conservators use significance assessments to guide decision-making.

The tips for C1.2 and B2.1 also contain information about significance assessments.

Keeping records

It is important to document all interventive conservation work. Keep records of:

- who did the work
- when
- what exactly was done – include dismantling and re-assembly, treatments carried out, restoration work, introduction of new or modified parts to the item

Photographs and sketches can be used to show the item before and after conservation treatment.

Maintaining treated items

Returning a collection item to an inappropriate environment will undermine the effects or benefits of any conservation treatment.

Identifying a suitable location for the display or storage of a treated item is an important part of planning conservation work.

Books and online publications

Museums & Galleries NSW, Fact Sheet: *Condition Reporting*, at www.mgnsw.org.au

Museums Australia, *Museum Methods*, 2002

Heritage Collections Council, *Significance*, 2001, at www.collectionsaustralia.net.au

Australian Institute for Conservation of Cultural Material (AICCM), *Guidelines for Commissioning Conservation Treatment*, at www.aiccm.org.au

Heritage Collections Council, *reCollections*, 1998, at www.collectionsaustralia.net.au

Australia ICOMOS, *Burra Charter*, 1999, at www.icomos.org

AICCM, *AICCM Code of Ethics and Code of Practice*, 2005, at www.aiccm.org.au

NSW Heritage Office, *Safe in the Shed*, 2001, at www.collectionsaustralia.net.au

Other contacts

Artlab Australia, ph: 8207 7520





Standard C2.5

The museum has identified, and is able to respond to, all potential threats to its collection.

Benchmarks

- C2.5.1** All current and potential threats to the collection are identified through regular risk assessments.
- C2.5.2** Potential threats to the collection are removed or reduced.
- C2.5.3** The disaster preparedness and response plan is informed by a current risk assessment and is regularly reviewed.
- C2.5.4** The disaster preparedness and response plan includes an up-to-date list of contacts for emergencies.
- C2.5.5** Workers have training in disaster preparedness and are familiar with the museum's disaster preparedness and response plan.

CMP Evidence

R & A	Disaster bin/s on the museum site/s	
R & A	Written disaster preparedness and response plan	
A	Records showing that the disaster preparedness and response plan has been updated annually	
A	List of museum workers who have completed disaster training	

Standard C2.5: Tips & Resources

Risk assessments

Risk assessments might be conducted or reviewed on an annual or seasonal basis.

There is an established process for conducting risk assessments outlined in the essential publication by the Heritage Collections Council: *Be Prepared: guidelines for small museums for writing a disaster preparedness plan*, 2000

Reducing risks

Basic risk reduction steps include:

- regular building maintenance
- regular inspections of storage and display spaces
- using suitable display cases and shelving for collection items
- building security
- sealing gaps around doors and windows
- having emergency response equipment on hand (such as fire extinguishers)
- covering items that are potentially at risk from water damage

Disaster preparedness and response plan (disaster plan)

Disasters can be small or large - in museums any event that results in the loss of, or damage to, a collection item is considered a disaster.

Disaster plans cover:

- assessment of risks to the collection
- measures to reduce or remove these risks
- collection salvage priorities
- who is on the disaster response team
- what other networks are available to help
- actions for responding to potential disasters
- actions for disaster recovery, including recovery techniques

The best guide for museums for preparing a disaster plan is *Be Prepared*. Advice, assistance and training are also available from the History Trust and Artlab Australia.

CMP accredited museums must have an up-to-date and comprehensive disaster plan, prepared according to the guidelines specified in *Be Prepared*.

CMP registered museums must have a partly prepared disaster plan consisting of:

- emergency contacts list
- list of major potential risks to the collection
- list of steps that have been taken to alleviate these risks
- basic list of salvage priorities

Standard C2.5: Tips & Resources (continued)

In addition, both registered and accredited museums should have at least one disaster bin, containing basic supplies for quick response to minor disasters.

Be sure to consider all aspects of the museum in the disaster plan, including:

- activities and special events
- buildings
- collections
- exhibitions
- people

Relevant contacts might include

- individuals
- members of the museum's governing body
- museum workers
- organisations
- service providers

Blue Shield Australia encourages museums to support its May Day program by using the month of May each year as the occasion for training in, and review of, disaster preparedness.

Updating disaster plan

Disaster plans should be regularly reviewed and updated to retain their currency and usefulness. This is especially important because disaster plans contain contact information that may go out of date quite quickly.

Annual reviews and updates are recommended. It is important to update:

- contact details of suppliers and emergency services
- contact details of disaster team members
- the priority salvage list
- documentation of previous disasters
- salvage information, such as location of keys for display cabinets, handling instructions and salvage techniques
- the contents of disaster bins

Ways that museums may choose to record reviews and updating include:

- a simple document version control system
- minuting reviews and updates at a meeting

Disaster bin

A mobile disaster bin is essential for all museums. Small wheelie bins or large plastic storage tubs on wheels make good disaster bins. Large museum sites may require more than one disaster bin.

Standard C2.5: Tips & Resources (continued)

Disaster bins contain basic items that can be used to undertake initial disaster response tasks, such as drying, packing, labelling and recording. For small disasters they contain enough materials to deal with the situation. For larger disasters they contain enough to make a start until further supplies are located or purchased.

Disaster response

Disaster response requires special skills in salvage techniques. All disaster team members should have training in disaster response. It is useful to have disaster team training sessions on a regular basis.

Most disasters involve water damage of some kind, so disaster response often involves dealing with wet collection items.

Books and online publications

Heritage Collections Council, *Be Prepared: guidelines for small museums for writing a disaster preparedness plan*, 2000, at www.collectionsaustralia.net.au

Heritage Collections Council, *reCollections*, 1998, at www.collectionsaustralia.net.au

Museums Australia, *Museum Methods*, 2002

Websites

Australian Institute for Conservation of Cultural Material (AICCM) www.aiccm.org.au

Blue Shield Australia www.collectionscouncil.com.au

7: CMP Checklists

Checklist: Evidence for CMP Registration: written

Checklist: Evidence for CMP Registration: site assessment

Checklist: Evidence for CMP Accreditation: written

Checklist: Evidence for CMP Accreditation: site assessment

Checklist of Evidence for CMP Registration: written



Museums seeking CMP Registration are required to submit the following written information:

Standard	Evidence	
A1.1	Copy of certificate of incorporation, or other legal framework	<input type="checkbox"/>
	Copy of museum's constitution, or other guiding document	<input type="checkbox"/>
	'Wind-up clause' in constitution or other guiding document	<input type="checkbox"/>
A1.2	Description summarising the functions and activities of the museum	<input type="checkbox"/>
	List of designated roles and responsibilities for the museum's governing body or management committee	<input type="checkbox"/>
	List of designated roles and responsibilities to ensure that all museum tasks are well-managed	<input type="checkbox"/>
	Copy of meeting agenda template	<input type="checkbox"/>
A1.3	List of organisations to which the museum belongs, or has close association with	<input type="checkbox"/>
A1.4	Copy of minutes of meeting at which the governing body or management committee formally adopted the Museums Australia Code of Ethics	<input type="checkbox"/>
A2.1	Copy of museum's Statement of Purpose	<input type="checkbox"/>

Checklist of Evidence for CMP Registration: written (continued)

A2.2 Copy of museum's current policies and procedures

A2.3 Copy of museum's current Forward Plan

A2.4 Copy of museum's latest annual report

Copy of museum's Privacy Statement

A2.5 Copy of latest annual audited/checked financial statement

A3.2 Copy of museum's volunteer guidelines outlining the rights and responsibilities of the museum and its volunteers

A4.2 Map of museum site indicating use of spaces

A4.3 Copy of policy on commercial use of museum assets, if relevant

B1.1 List of community groups and key individuals who have contributed to museum operations and programs over the past 1-3 years

Checklist of Evidence for CMP Registration: written (continued)

B1.2 List of community activities and events in which the museum has been involved over the last 3 years

B2.1 List of museum's displays and interpretive programs over last 1-3 years

B2.3 Example of a completed critical review of a display or other interpretive program, using History Trust template

B3.2 Copy of current promotional brochure or other printed marketing materials

B3.3 Photographs of museum signage
Copy of any printed orientation information for museum site and galleries

B3.4 Statement of museum's opening hours
Copy of current roster

C1.1 Copy of museum's Collection Policy and associated procedures, consisting of sections on:

- acquisitions
- cataloguing
- loans
- deaccessioning and disposal
- preventive conservation
- collection access

Checklist of Evidence for CMP Registration: written (continued)

- C1.2** Examples of cataloguing sheets or database entries where the significance of an object has been recorded
- Copy of completed collection summary form

- C1.3** Sample of museum's current donation form
- Copy of statement outlining any ownership issues relating to the collection

- C1.5** Copy of guidelines the museum uses for undertaking digitisation projects, if applicable

Checklist of Evidence for CMP Registration: site assessment

History Trust Community Museums Program staff will want to see or hear:

Standard	Evidence	
A1.2	Minutes of meetings over last financial year	<input type="checkbox"/>
A1.4	Copy of the Code of Ethics readily available for reference by the museum's governing or managing body, and workers (current and new)	<input type="checkbox"/>
A1.5	Copies of relevant protocols available for the museum's governing or managing body, and all museum workers	<input type="checkbox"/>
	Museum's acknowledgement of the Indigenous owners and custodians of the land on which the museum is sited	<input type="checkbox"/>
A2.2	Copy of meeting minutes where policies and procedures were formally adopted	<input type="checkbox"/>
	Policies and procedures available for the museum's governing body or management committee, workers, and public (where relevant)	<input type="checkbox"/>
A2.4	Records of museum's operations and history	<input type="checkbox"/>
A2.5	Guidelines and/or procedures for financial transactions, as required	<input type="checkbox"/>

Checklist of Evidence for CMP Registration: site assessment (continued)

A2.6	Explanation of ways that the museum manages risks	<input type="checkbox"/>
A3.1	Discussion on how the museum ensures that there are suitable people to carry out key operations and functions	<input type="checkbox"/>
A3.2	Induction materials provided for new workers	<input type="checkbox"/>
A3.3	Records of training programs attended by workers within the last 3 years	<input type="checkbox"/>
	Manuals and resources on museum practice available for workers	<input type="checkbox"/>
A4.1	Current lease or land title; or relevant correspondence regarding ongoing use of the site	<input type="checkbox"/>
A4.2	Explanation of efforts made to provide physical access for people of all ages and abilities to museum site, within circumstances and resources	<input type="checkbox"/>
A4.3	Explanation of fire safety measures	<input type="checkbox"/>
	Explanation of security measures	<input type="checkbox"/>
	Explanation of site and equipment maintenance processes	<input type="checkbox"/>
	Explanation of considered use of natural resources, e.g. recycling, lighting, blinds, passive energy design	<input type="checkbox"/>

Checklist of Evidence for CMP Registration: site assessment (continued)

B2.1 Examples of a variety of methods used to present stories, ideas and collection items

Examples showing how the museum explains the significance of key collection items, buildings and the museum site

Examples showing how the museum covers different eras and perspectives in its displays and interpretive programs

B2.2 Examples of programs or publications based on research

Examples of:

- acknowledgement of doubt or uncertainty about facts
- acknowledgement of sources and copyright

Examples of:

- acknowledgement of use of replicas or reproductions
- acknowledgement of use of props

B2.3 Examples of the meaningful grouping of collection items

Examples of opportunities for visitors to respond and get involved in displays and programs

Example of a well designed and well organised display

B3.1 Records of visitor numbers and types of visitors

Examples of visitor responses and feedback

B3.6 Explanation of what the museum is doing to be accessible to a range of people

Checklist of Evidence for CMP Registration: site assessment (continued)

C1.2	Object and/or research files for at least some key collection items	<input type="checkbox"/>
C1.3	Records of acquisition transactions	<input type="checkbox"/>
C1.4	Explanation of museum's collection documentation system and work program	<input type="checkbox"/>
C2.1	Examples of how the museum has applied preventive conservation strategies identified in the Collection Policy	<input type="checkbox"/>
	Copies of key preventive conservation reference materials on hand	<input type="checkbox"/>
C2.2	Examples of steps taken to maintain an appropriate museum environment for the collection	<input type="checkbox"/>
C2.3	Examples of steps taken to apply and use appropriate display support materials and methods	<input type="checkbox"/>
	Examples of steps taken to apply and use appropriate storage materials and methods	<input type="checkbox"/>
C2.4	Explanation of steps taken to plan and document any interventive conservation work	<input type="checkbox"/>
	Examples where treated collection items are suitably stored or displayed	<input type="checkbox"/>

Checklist of Evidence for CMP Registration: site assessment (continued)

- | | | |
|-------------|---|--------------------------|
| C2.5 | Disaster bin/s on the museum site/s | <input type="checkbox"/> |
| | Written disaster preparedness and response plan | <input type="checkbox"/> |

Checklist of Evidence for CMP Accreditation: written

Museums seeking CMP Accreditation are required to submit the following written information:

Standard	Evidence	
-----------------	-----------------	--

- | | | |
|-------------|--|--------------------------|
| A1.1 | Copy of certificate of incorporation, or other legal framework | <input type="checkbox"/> |
| | Copy of museum's constitution, or other guiding document | <input type="checkbox"/> |
| | 'Wind-up clause' in constitution or other guiding document | <input type="checkbox"/> |

- | | | |
|-------------|---|--------------------------|
| A1.2 | Description summarising the functions and activities of the museum | <input type="checkbox"/> |
| | List of designated roles and responsibilities for the museum's governing body or management committee | <input type="checkbox"/> |
| | List of designated roles and responsibilities to ensure that all museum tasks are well-managed | <input type="checkbox"/> |
| | Copy of meeting agenda template | <input type="checkbox"/> |

- | | | |
|-------------|--|--------------------------|
| A1.3 | List of organisations to which the museum belongs, or has close association with | <input type="checkbox"/> |
| | Membership of Museums Australia | <input type="checkbox"/> |

- | | | |
|-------------|--|--------------------------|
| A1.4 | Copy of minutes of meeting at which the governing body or management committee formally adopted the Museums Australia Code of Ethics | <input type="checkbox"/> |
|-------------|--|--------------------------|

- | | | |
|-------------|---------------------------------------|--------------------------|
| A2.1 | Copy of museum's Statement of Purpose | <input type="checkbox"/> |
|-------------|---------------------------------------|--------------------------|

Checklist of Evidence for CMP Accreditation: written (continued)

A2.2 Copy of museum's current policies and procedures

Records showing that policies and procedures have been reviewed and updated in the last 1-3 years

A2.3 Copy of museum's current Forward Plan

A2.4 Copy of museum's latest annual report

Copy of museum's Privacy Statement

A2.5 Copy of latest annual audited/checked financial statement

Copy of current annual budget (income and expenditure)

A3.1 Copy of position descriptions and/or task sheets for key roles and tasks

A3.2 Copy of museum's volunteer guidelines outlining the rights and responsibilities of the museum and its volunteers

A4.2 Map of museum site indicating use of spaces

Checklist of Evidence for CMP Accreditation: written (continued)

A4.3 Copy of policy on commercial use of museum assets, if relevant

B1.1 List of community groups and key individuals who have contributed to museum operations and programs over the past 1-3 years

Statement summarising diversity of museum's wider community

Description of programs developed for different audiences, age groups and levels of abilities

B1.2 List of community activities and events in which the museum has been involved over the last 3 years

B2.1 List of museum's displays and interpretive programs over last 1-3 years

B2.3 Example of a completed review of a display or other interpretive program, using History Trust template

B3.2 Copy of current promotional brochure or other printed marketing materials

B3.3 Photographs of museum signage

Copy of any printed orientation information for museum site and galleries

Checklist of Evidence for CMP Accreditation: written (continued)

- B3.4** Statement of museum's opening hours
- Copy of current roster

- B3.6** Copy of a completed Access Audit

- C1.1** Copy of museum's Collection Policy and associated procedures, consisting of sections on:
- acquisitions
 - cataloguing
 - loans
 - deaccessioning and disposal
 - preventive conservation
 - collection access

- C1.2** Examples of cataloguing sheets or database entries where the significance of a collection item has been recorded
- Copy of museum's formal significance assessment of its collection

- C1.3** Sample of museum's current donation form
- Statement outlining strategy to gain legal title to items in the collection

- C1.5** Copy of guidelines the museum uses for undertaking digitisation projects, if applicable

Checklist of Evidence for CMP Accreditation: written (continued)

- | | | |
|-------------|---|--------------------------|
| C2.2 | Copy of museum's conservation strategy outlining a full and comprehensive program to maintain an appropriate environment/s for the collection | <input type="checkbox"/> |
|-------------|---|--------------------------|

Checklist of Evidence for CMP Accreditation: site assessment



History Trust Community Museums Program staff will want to see or hear:

Standard	Evidence	
A1.2	Minutes of meetings over last financial year	<input type="checkbox"/>
A1.4	Copy of the Code of Ethics readily available for reference by the museum's governing or managing body, and workers (current and new)	<input type="checkbox"/>
	Forms signed by all relevant workers, stating that they have read and agree to abide by the Code of Ethics	<input type="checkbox"/>
	Explanation of how the museum demonstrates a clear commitment to the Code of Ethics in relation to caring for its collection	<input type="checkbox"/>
A1.5	Copies of relevant protocols available for the museum's governing or managing body, and all museum workers	<input type="checkbox"/>
	Museum's acknowledgement of the Indigenous owners and custodians of the land on which the museum is sited	<input type="checkbox"/>
	Forms signed by all relevant workers, stating they have read and agree to abide by the museum's protocols	<input type="checkbox"/>
A2.2	Copy of meeting minutes where policies and procedures were formally adopted	<input type="checkbox"/>
	Policies and procedures available for the museum's governing body or management committee, workers, and public (where relevant)	<input type="checkbox"/>
	Forms signed by all relevant workers, stating that they have read and agree to abide by the museum's policies and procedures	<input type="checkbox"/>

Checklist of Evidence for CMP Accreditation: site assessment (continued)

A2.4 Records of museum's operations and history

A2.5 Guidelines and/or procedures for financial transactions, as required

A2.6 Explanation of ways that the museum manages risks

A3.1 Discussion on how the museum ensures that there are suitable people to carry out key operations and functions

A3.2 Induction materials provided for new workers

A3.3 Records of training programs attended by workers within the last 3 years

Manuals and resources on museum practice available for workers

A4.1 Current lease or land title; or relevant correspondence regarding ongoing use of the site

A4.2 Explanation of efforts made to provide physical access for people of all ages and levels of ability to museum site, within circumstances and resources

Checklist of Evidence for CMP Accreditation: site assessment (continued)

- A4.3**
- Explanation of fire safety measures
 - Explanation of security measures
 - Explanation of site and equipment maintenance processes
 - Explanation of considered use of natural resources, e.g. recycling, lighting, blinds, passive energy design
 - Register/s listing museum assets and equipment

- B2.1**
- Examples of a variety of methods used to present stories, ideas and collection items
 - Examples showing how the museum explains the significance of key collection items, buildings and the museum site
 - Examples showing how the museum covers different eras and perspectives in its displays and interpretive programs

- B2.2**
- Examples of programs or publications based on research
 - Examples of:
 - acknowledgement of doubt or uncertainty about facts
 - acknowledgement of sources and copyright
 - Examples of:
 - acknowledgement of use of replicas or reproductions
 - acknowledgement of use of props
 - Example of an interpretive program where differing points of view, or contested history, have been included
 - Examples of how the museum has applied current museological practices

Checklist of Evidence for CMP Accreditation: site assessment (continued)

- B2.3** Examples of the meaningful grouping of collection items
- Examples of opportunities for visitors to respond and get involved in exhibitions and programs
- Example of a well designed and well organised display
- Example of a major display project, using museum consultants
- Explanation of how the museum evaluates its displays, activities and events, and applies the results

- B3.1** Records of visitor numbers and types of visitors
- Examples of visitor responses and feedback
- Explanation of visitation patterns
- Explanation of strategies implemented to attract and retain audiences
- Example of a visitor survey

- B3.6** Explanation of what the museum is doing to be accessible to a range of people

- C1.2** Object and/or research files for at least some key collection items
- Example of a project the museum has completed or is undertaking that demonstrates the application of significance to its management of the collection

- C1.3** Records of acquisition transactions

Checklist of Evidence for CMP Accreditation: site assessment (continued)

- C1.4** Explanation of museum's collection documentation system and work program
- Demonstration that the cataloguing of the collections is substantially complete
- Demonstration that a suitable, commercially available collection management database is in use

- C1.5** Demonstration and/or documentation of a completed or planned digitisation project that has been/will be conducted according to the benchmarks

- C2.1** Examples of how the museum has applied preventive conservation strategies identified in the Collection Policy
- Copies of key preventive conservation reference materials on hand
- Copy of preservation study prepared or updated within the last 5 years

- C2.2** Examples of steps taken to maintain an appropriate museum environment for the collection
- Explanation of improvements to key display and storage areas in the last 5 years

- C2.3** Examples of steps taken to apply and use appropriate display support materials and methods
- Examples of steps taken to apply and use appropriate storage materials and methods

Checklist of Evidence for CMP Accreditation: site assessment (continued)

- C2.4** Explanation of steps taken to plan and document any interventive conservation work
- Examples where treated collection items are suitably stored or displayed
- Examples of conservation plan, statement of significance and treatment records for items where interventive conservation work has been carried out

- C2.5** Disaster bin/s on the museum site/s
- Written disaster preparedness and response plan
- Records showing that the disaster preparedness and response plan has been updated annually
- List of museum workers who have completed disaster training