

Unit AG1 Develop strategies for the maintenance and use of a collection

Elements

AG1.1 Determine the scope and potential development of a collection

AG1.2 Plan the acquisition and disposal of items and collections

AG1.3 Develop a loan policy

Unit Commentary

This unit is for archaeologists who have responsibility in an organisation for the maintenance and use of collections. A museum is the most obvious situation where this function will occur but collections are maintained by many other organisations for educational and research purposes. It is important in all cases to develop a strategy for how an organisation's collection will be developed and maintained.

This unit covers determining how the collection should develop, and involves reviewing what is already in the collection, and what the options are for developing it. It looks at planning how the scope of the collection can be realised either through acquisition and/or disposal, and developing a loan policy which covers items which are borrowed or loaned to other organisations.

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AG1.1 Determine the scope and potential development of a collection

Performance Required

This will involve:

- a) Reviewing the acquisition and disposal policies of the organisation thoroughly and presenting them in a suitable document
- b) Identifying the **scope** and **significance** and the strengths and weaknesses of the existing collection
- c) Assessing the effectiveness of the acquisitions and disposals criteria
- d) Assessing the impact of current and future use of the collection
- e) Evaluating the relationship between the existing collection and the requirements of the organisation's policies
- f) Investigating thoroughly the options for adding to the collection
- g) Taking fully into account the acquisition and disposal policies of other organisations
- h) Identifying clearly any **potential developments** and the resource implications for the organisation, and assessing them for their impact on current and future collections

Occupational Context

1 Scope of the collection

- quantity
- quality
- geographical area
- historical period,

2 Significance of the collection

- historical, importance
- cultural importance
- scientific importance.

3 Potential developments

- anticipated use
- availability of other items
- funds
- personnel
- facilities.

Knowledge Requirements

You need to know and understand how to:

- Evaluate the effectiveness of policies and procedures

You need to know about:

- How acquisitions and disposals contribute to the maintenance of the collection
- The criteria that are used in determining the strengths and weaknesses of the collection
- The policies of the organisation
- National guidelines on selection, retention and dispersal of collections
- The options that are available for the expansion of the collection
- What other organisations are doing in relation to acquisition and disposal
- The resource implications that have affected the organisation
- The new developments that might impact on the organisation

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AG1.1 Determine the scope and potential development of a collection

Required Skills

You should demonstrate:

- How to evaluate the effectiveness of acquisition and disposal policies and procedures
- How to assess the use of the collection
- How to evaluate the relationship between the collections and the overall objectives of the organisation

Evidence Required

You should provide evidence that you can determine the scope and potential development of a collection

The candidate should be questioned, based upon the documentation provided, to explore how they:

- determine the scope and potential development of a collection.

The scope of the collection will cover areas such as quantity, quality, geographical area and historical period, and the significance of the collection should cover its historical, cultural or scientific importance.

Evidence Rules

The candidate must have been involved in developing a loan policy on at least one occasion

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AG1.2 Plan the acquisition and disposal of items and collections

Performance Required

This will involve:

- a) Reviewing regularly the **acquisition and disposal policies** of the organisation and providing guidance on acquisitions and disposals
- b) Identifying the acquisition and disposal activities of other **relevant organisations**
- c) Assessing fully the effects of new acquisitions and disposals on the organisation
- d) Identifying the **resources available for acquisitions** and establish priorities according to the organisation's policies
- e) Identifying potential acquisitions and disposals

Occupational Context

1 Acquisition and disposal policies

- criteria used
- impact on the organisation
- impact on the funding bodies supporting the organisation
- impact on the users of the collections

2 Relevant organisations

- museums
- universities
- other educational institutions
- commercial organisations

3 Resources available for acquisitions

- grants
- organisation's own funds
- bequests

Knowledge Requirements

You need to know and understand how to:

- Evaluate the effectiveness of policies and procedures
- Generate resources for acquisitions or disposals

You need to know about:

- The acquisition and disposal policies of the organisation
- National guidelines on the selection, retention and dispersal of collections
- What other cultural heritage organisations are doing in relation to acquisition and disposal
- The previous and likely effects of acquisitions or disposals on the organisation
- The resources that are likely to be needed for acquisitions or disposals
- The consequences of the different types of acquisition, e.g. gift, bequest, purchase
- The ethical considerations in relation to acquisitions and disposals
- The insurance requirements of the collection
- The types of acquisitions that could be seen as unethical and why
- The types of disposals that could be seen as unethical and why
- The sources of information on potential acquisitions or disposals
- Who should be informed of potential acquisitions or disposals
- Why it is important to have a plan for acquisitions and disposals

AG1 Develop strategies for the maintenance and use of a collection

AG1.2 Plan the acquisition and disposal of items and collections

Required Skills

You should demonstrate:

- How to review acquisition and disposal policies and effects
- How to assess the effects of new acquisitions and disposals

Evidence Required

You should provide evidence that you can plan the acquisition and disposal of items and collections

The candidate should be questioned, based upon the documentation provided, to explore how they:

- plan the acquisition and disposal of items and collections.

You must account for the history of acquisition and disposal of items, and provide a clear plan for the items and collections in the future.

Evidence Rules

The candidate must have been involved in developing a loan policy on at least one occasion

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AG1.3 Develop a loan policy

Performance Required

This will involve:

- a) Reviewing the loan **policy** of the organisation regularly and determining general criteria for lending and borrowing items
- b) Identifying the lending and borrowing activities of associated organisations
- c) Assessing fully the **effect on the organisation** of lending and borrowing items
- d) Identifying clearly the **resource requirements** for implementing the loan policy
- e) Specifying clearly the categories of borrower and the purposes of loans to be considered
- f) Ensuring the loan policy covers incoming loans and outgoing loans
- g) Establishing clear **standards of care** for items loaned to borrowing organisations
- h) Establishing procedures for monitoring and reviewing the loan policy

Occupational Context

1 Policy

- national organisations
- international organisations
- private individuals.

2 Effect on the organisation

- staff
- time
- funds
- interruption of research
- denuding of displays

3 Resource requirements

- staffing
- insurance (in transit / on loan)

4 Standards of care

- display conditions
- storage conditions
- environmental controls
- how the objects should be handled
- how the objects should be transported

Knowledge Requirements

You need to know and understand how to:

- Evaluate the effectiveness of policies and procedures
- Ensure that the policy can work in practice
- Generate standards of care for items

You need to know about:

- The loan policy of the organisation
- National guidelines on the selection, retention and dispersal of collections
- What other organisations are doing in relation to lending and borrowing
- The effect that lending or borrowing has on the organisation
- The resources that are used for lending and borrowing
- The different procedures for loans that are for research rather than display purposes
- Why a loan policy is important

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AG1.3 Develop a loan policy

Required Skills

You should demonstrate:

- How to prepare borrowing and lending procedures
- How to specify standards of care for items

Evidence Required

You should provide evidence that you can develop a loan policy

The candidate should be questioned, based upon the documentation provided, to explore how they:

- develop a loan policy that covers both incoming and outgoing loans.

You will develop a new or an existing policy covering relationships with national and international organisations as well as private individuals.

The loan policy should also establish priorities that will assist where conflicting requests are received.

Evidence Rules

The candidate must have been involved in developing a loan policy on at least one occasion