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# INDIANA HISTORICAL SOCIETY COLLECTIONS ADVISOR

A RESOURCE FROM IHS LOCAL HISTORY SERVICES

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## SPECIAL EDITION COLLECTIONS MINIVISOR: REVIEWING PROCEDURES, PAPERWORK AND FORMS

By Karen DePauw, manager, IHS Local History Services

We all face the new reality of trying to do our work from home as we do our part to slow the spread of COVID-19. With this in mind, we thought it might be helpful to do a short-term weekly mini version called Collections Minivisor to give you some ideas of things you can do from home that still help propel our work with museum collections. These special editions will come out each Wednesday for the next few weeks and won't replace the monthly Collections Advisor, which will still be sent on the first of each month. If you have ideas for content, or if you would prefer not to receive the weekly editions but would like to continue to receive the monthly Collections Advisor, please email [collectionsadvisor@indianahistory.org](mailto:collectionsadvisor@indianahistory.org) to let us know.

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### ONLINE RESOURCES

[Collections Advisors](#)  
(Indiana Historical Society, Local History Services)

[There's a Form For That Documenting Your Collections](#)  
(Connecting to Collections Care)

[Form and Policy Swap](#)  
(Collections Stewardship)

[Build from the Ground Up](#)  
(FRSecure)

[Museum Handbook](#)  
(National Park Service)



[American Airlines Employees Participate in Loan Drive.](#) (Indiana Historical Society)

Last week, it was all about the big pictures stuff, the plans and the policies that help us understand why we do what we do. This week consider taking a look at the smaller parts with a focus on your everyday work. Our procedures differ from our policies and plans in a few ways. Procedures focus in on the detailed tasks we undertake in order to accomplish the bigger picture

outlined in our plans and policies. They are not usually board approved and are created by the individuals charged with carrying out the tasks. Care should be taken to ensure procedures stay in line with the overarching organizational plans and policies.

For instance, a Collections Management Policy looks at the big picture of what the museum collects and why, but there might also be procedures for collections intake, collections cataloguing, and collections digitization. The procedures provide the step-by-step and how-to parts of the process. A procedure for collections intake might include: fill out a temporary receipt, give the item and receipt to those dealing with the collection, compare items and stories to other items in the collection and the Collections Management Policy, provide a recommendation to the collections committee regarding accessioning the item, if accepted send a thank you and Deed of Gift to donor, if not accepted reach out to donor to pick up item. Obviously that is a very pared down version of a procedure for collections intake, but it gives you an idea of the type of steps covered in a procedure.

Take some time while at home to look at any procedures and related paperwork or forms (in our above example that would include the temporary receipt form and the Deed of Gift) to identify anything that needs updated. Determine what, if any, of the procedures and forms should require board review, collections committee review, or if they simply need collections staff/volunteers review. See if anything is missing and find examples from other museums to help guide you in creating some new procedures or forms.

There are multiple activities done by museums that can benefit from solid procedures. If you feel overwhelmed, start by making a list of all of the procedures, paperwork, and forms the museum uses and then clump them together by type to make the review easier. For instance, review all of the collections-related items at the same time and then all of the membership items at the same time...that way you can notice if anything is just a repeat of the same form/procedure and could actually be combined with another. You can then determine the best group of people to review each type of procedure depending on their responsibilities with the museum and their knowledge regarding that part of the museum's function. Solid procedures, paperwork, and forms can really help the museum be its most efficient and effective self.

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