

INDIANA HISTORICAL SOCIETY
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Creating A Collections Manual

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We talk a lot about recording any decision you make about your collection so people in the future know how things have been done and why decisions were made. When you change how things are done, it is helpful to know why one group decided to do it that way in the first place. The best way to record all of these bits and pieces pertaining to the collection is by creating a Collections Manual or handbook.

While a Collections Manual is an important piece for any museum, it can be particularly important for small museums or those run entirely by volunteers who might find that they have high turnover of those dealing with the collection. Any collections department, paid or volunteer, will benefit from having access to such documentation. The manual should always be kept in a place easily accessible to anyone who works with the collection. It might even be a good idea to have one copy that lives at the museum and another that resides offsite with whoever serves as the collections manager.



[Typing Class at Emmerich Manual Technical High School](#) (Bass Photo Co Collection, Indiana Historical Society)

When putting together a Collections Manual, here are things to consider including.

1. General overview of the collection's contents. Think of this as a very short executive summary of the collection and the contents of the manual.
2. Collections Management Policy - This should be one of the first pieces in your manual. You might even consider adding a short piece that captures any of the discussions had when the policy was created if it would help future users of the policy understand why certain decisions were made.
3. Collections Processes - Include all written processes followed by the collections department. They might include things like how to accession items, how to deaccession items, what to do if something breaks, how to catalogue items, and so forth.
4. Collections Committee and Board lists - This should include the names, contact information, and offices held of each member.
5. Insurance Policy - A copy of the museum's insurance policy, or at least the portions related to the collection, should be kept in the manual.
6. Emergency Preparedness Plan - While a copy of this plan should live somewhere easily accessible to everyone, it is also important to keep it in the manual so copies of everything someone new working with the collections would need are in one place.
7. List of important contacts - While some of these may be repeats of those listed in the Emergency Preparedness Plan, it can be helpful to have a separate list as well that is a bit broader. This separate list might also include things like contact information for the museum's insurance agent if you need to get a certificate of insurance for a loan, the local plumber who can quickly fix small leaks, or the name of someone who can come shovel snow off the roof if a heavy storm means a flat roof is in danger of being

damaged. This can serve as an easy, quick reference and can help get you through an emergency if you are still working on your Emergency Preparedness Plan.

8. List of collections tracking systems - This might sound weird, but almost everyone who has ever worked with a museum collection has come across the problem of not knowing where or how objects and their information were tracked at different periods in the museum's life. For example, perhaps in the early years of the museum notes were simply made and put with items (like a scrap of paper in the bottom of a vase), then they moved to tracking things in an accession book until the 1980s, then a card catalogue system was used before the organization went digital in the 2010s. Recording all of this will help those searching for information about the collection understand where to look. Putting this together will likely take some sleuthing, but if you include it in the manual it will not need repeating in the future.
9. Description of numbering convention(s) - This should include both current and past numbering conventions. Even if you use the standard three-part object numbering convention (2022.14.27) it is still a good idea to mention it. Also, mention any previous numbering conventions used by the museum. Include explanations of any changes or special numbers used, like "X" numbers or Found in Collection numbers.
10. Hard copies of all forms and paperwork - While you likely have digital paperwork, perhaps even your collections database creates paperwork for you, it is a good idea to have a hard copy of all paperwork at the ready. Copies of Temporary Receipts, Deed of Gift forms, loan paperwork, and so on are helpful to have on hand for reference or easy copying if you need something at a moment's notice.
11. List of all storage areas - This may also contain a general idea of what types of items each contains and where they are located in the building. Do not forget to include any off-site storage.
12. Digitization Standards - Whether digitizing three-dimensional objects or flat objects, it is helpful to set standards for size, quality, etc.
13. Any other pertinent reports - This might include everything from facilities reports with environmental read-outs to historic structures reports. Anything that might be of assistance to people dealing with the collection should be included.



[Woman Sitting on Books](#) (Mitchell Printing Co. Collection, Indiana Historical Society)

By creating a robust Collections Manual you will be able to save yourself and any future staff or volunteers countless headaches. While advisable to have the manual in hard copy form, it is also important to place all the digital files together into a single folder to create a digital version of the manual. The digital version can be saved in a variety of places and be easily accessible in case of emergency. Make sure when putting together the manual to include the date it was created and a reminder to review it annually. Any time a major change is made to how the collections are dealt with, make sure those are included. The manual should always be as up to date as possible. If you need further information on some of the elements listed above, check out previous issues of Collections Advisor where most of these topics have been covered in depth.

Further Resources

- [Collections Advisors](#) (Indiana Historical Society)

Collection Trainings

[Following, Leading, & Managing in the Current Climate](#)

April 4 – (American Association for State and Local History)

[Pulling it All Together: Citywide Museum Events](#)

April 7 – (Texas Historical Commission)

[What's in a Name? Rebranding Your History Organization](#)

April 27 – (Texas Historical Commission)

[Collections Intake in a Remote Work Environment](#)

April 28 – (Connecting to Collections)

[Webinars](#)

Recorded – (Indiana Historical Society)

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