

MUSEUMS  
ASSOCIATION

# Effective Collections

programme prospectus  
**2009-12**

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# Foreword

I am very pleased that the Museums Association (MA) is launching the full phase of Effective Collections. For many years there has been talk of the UK's museums collectively being responsible for a 'distributed national collection'. Effective Collections is a manifestation of that ideal with its encouragement to museums to share their collections more widely.

Effective Collections builds directly on the MA's seminal Collections for the Future report, which argued that it is not enough for a museum to simply acquire and preserve a collection: the job of a museum is to make sure that the collection gets used.

Thanks to generous funding from the Esmée Fairbairn Foundation, the MA will offer funding and support to museums to make better use of their stored collections, primarily through long loans, transfer and other forms of disposal.

The programme is aimed at museums of all types and sizes, in all subject areas, in all nations and regions of the UK. I hope that it will appeal particularly to small and medium museums that tend to have less access to funding from other sources. I hope your museum will consider applying to join Effective Collections. By doing so it can get more out of its collection, get more objects actually used, and be better connected across the sector.

Effective Collections participants will also have many opportunities to learn from and network with others to improve skills, ambition and confidence.

This prospectus invites museums to join the Effective Collections programme, describing the funding and support on offer. It also describes work to continue to change the culture of the UK museum sector so that museums will expect to make more use of their stored collections, be generous lenders and see disposal as a normal part of managing and developing a collection.

**Stuart Davies,  
president, MA**





## 1.1

The MA has focused specifically on collections as an area of work since 2004 with the development of the Collections for the Future report, published in 2005. In those five years the MA has worked in a range of ways to push the debate on collections and their use, involving the depth and breadth of the museum sector to look at issues including strategic approaches to acquisitions, subject-specialist skills, collections research, access to stored collections, loans and disposal.



## 1.2

Effective Collections is the cornerstone of the MA's continuing work on collections – a £1m programme supported by the Esmée Fairbairn Foundation to make better use of collections, principally through increased long-term loans of stored material and a more active approach to disposal. Through Effective Collections, the MA is running a practical programme with museums and stimulating a change in culture: for museums to expect to do more with their collections.

## 1.3

Effective Collections has been running since late 2006 with a pilot phase testing ways of working (see section 7). With this prospectus we are launching a three-year full phase in the light of lessons learned (see section 2).

# Introduction

# Summary

**We invite you to participate in the four strands of Effective Collections:**

## Main Fund

Funding of up to £10,000 per project for museums to review their collections and make better use of them as a result. Funding is available for:

- **module a:** collections review to identify underused objects
- **module b:** developing a workplan to make better use of objects, eg on loan and via transfer or alternative forms of disposal
- **module c:** implementing the workplan.

There are four project rounds, six-monthly from September 2009. Any accredited museum, or museum working towards accreditation, can apply and museums that don't need a collections review can begin at module b.

## Special Project Fund

Funding of up to £25,000 per project to museums and partners for innovative projects that include loans and transfers. The criteria for these grants are based on:

- public outcomes
- impact on the museum, the sector and beyond
- innovation and ambition
- legacy and sustainability.

There are four project rounds, six-monthly from September 2009. Any accredited museum (or working towards), or partnership of organisations that includes an accredited museum (or working towards), can apply.

## Find an Object

A web listing service to advertise loan and disposal objects and promote their take-up by other museums and public venues.

Museums can post adverts offering objects, supplemented by pictures and background information, and other museums can respond directly to the advertiser to set up a loan or permanent transfer. Museums can also register an interest in borrowing or acquiring certain objects or types of material. The MA will matchmake these requests where it is possible to do so.

## Culture Change

A body of advocacy, research and campaigns working with partners to change the culture of museums, such that they expect to make better use of their collections. This includes significant pieces of work led by the MA to promote the key principles of loans, and on attitudes to risk. It also includes contributing to policy development across the sector with partners.





# Full phase



## 2.1

The full phase of Effective Collections builds on the experience of the pilot phase, notably on the findings of research projects run by the MA and evaluation with participants in pilot projects.

This learning has refined the philosophy behind the programme, and the key learning points described below form the rationale for the shape of the Effective Collections programme in the coming years. There are also challenges to the museum sector.

## 2.2

The principle theme throughout Effective Collections is for museums to expect to do more with their collections. While people in museums tend to agree with this idea in principle, museums' activities with collections often don't reflect these ambitions. We argue that if museums were to articulate the mission for their collections more clearly, viewing collections development and use holistically, then sharing collections would be absolutely core to any museum and a key priority for planning. Both as custodians of manageable, well cared-for collections and as service providers to audiences, it is a museum's responsibility to share its collections, for example on loan, by transfer and sometimes via other forms of disposal. The onus to use a collection lies with the owning museum so, through Effective Collections, we are trying new ways to help museums to increase use by sharing their collections more widely. Museums must maximise the value of the collections they invest in for their audiences, and Effective Collections supports museums to do just that.

## 2.3

If the sector is to see a change in culture we have to look at why some museums have lower expectations of collections' use and at the barriers that prevent museums from doing more. The paragraphs below reflect on our findings with Effective Collections so far, part of which is acknowledging that dealing with these issues and stimulating real change takes partnerships across the sector, links to wider museum policy and other funding streams. There is great potential for the future role of English Renaissance hubs, regional and national federations and networks such as Subject Specialist Networks to support links between museums to sustain changes in practice with collections. Similarly, other networks offer experience that Effective Collections can learn from, for example the Scottish Expert Panel to review collections.

## 2.4

A point that quickly became apparent in the early stages of Effective Collections was a demand for external expertise to review stored collections. While this desire to increase knowledge of collections is a good thing and supports the findings of the MA's work on developing collections-related knowledge, we also found in the pilot projects that museums' expectations of a review were often limited. They often wanted help to better manage collections internally and for an external specialist to do jobs that in-house curators didn't have the expertise or time for, and so the benefits of reviews could easily be limited by a lack of public outputs and lack of legacy in the development of staff. Effective Collections and other programmes need to tackle subject-specialist skills in museums, and also support museums to raise their ambitions and confidence with collections and to focus on public outcomes. See details of the Effective Collections Main Fund, section 3.

## 2.5

The findings from an Effective Collections proposal in 2008<sup>1</sup> showed that many museums support increased lending in theory, but struggle to put this into practice. In other words, museums agree that loans are a good thing, but they do not necessarily see them as a core part of their work. We argue that sharing collections is core to museums, and that includes loans or transfers of material to places where they can offer the most public benefit.

## 2.6

We also argue that not all museums can continue to collect and store material independently of each other or even continue to prioritise constant growth and capital projects.

The MA's work on sustainability in museums highlights the fundamentally unsustainable practice of acquiring more objects, and it is increasingly difficult to justify large (growing) collections to governing bodies in the face of current economic conditions and the need to reduce energy use.

In this context, greater partnership working, coordination and sharing of collections must be necessary and has to become a strategic priority for more museums. See details of our planned work on the key principles of loans, 6.2.



## 2.7

Over the course of a two-year review of the guiding principles of disposal, during the pilot phase of Effective Collections, the sector showed it had moved on significantly from the previous 'strong presumption against disposal' by approving changes to the Code of Ethics for Museums relating to disposal (see 6.7). Disposal is now acknowledged as a necessary part of normal collections management, and responses to the Disposal toolkit, published as part of Effective Collections in 2008, have been positive. However, the scale of disposal activity that has come to light in the past year and reactions from participants in MA training sessions (including meetings of museum directors) show that there is still a reluctance to contemplate large-scale disposal or rationalisation of collections beyond items that are in poor condition. Can museums sustain this approach? For example, in 20 years will museum collections be larger or smaller? If they are to be smaller, as the vast majority of participants in MA events suggest, what decisions do museums need to start making now? See 6.7 for more information about continuing work on disposal as part of Effective Collections.

## 2.8

Whether through limited ambitions for reviews, cautious approaches to loans or reluctance to dispose of significant numbers of items, the pilot phase of Effective Collections has shown a tendency for many people in museums to be risk-averse. On the other hand, some individuals – for example some members of the Collections Strategy Group (see 7.2) are more willing to balance the benefits of increased use of collections against risk to make brave decisions. Another finding of the 2008 loans research (see 2.5) was a disparity among museums in the risks they were willing to accept, for example with loans where one museum will use a courier and another won't. This difference in attitudes to risk, both by different organisations and at different levels within an organisation is something we are keen to investigate in the full phase of Effective Collections, see 6.5.

## 2.9

Sustainability and legacy are vital to Effective Collections. Through funded projects and culture change work we are aiming to seed a change in the way that museums in the UK work with collections, and this takes an investment from all parts of the sector as well as the MA. By seeking to work with sector agencies, hubs, and other networks (eg Subject Specialist Networks) we want to increase reach and sustainability; and by working to embed use of collections as a strategic priority in national strategies, other funding streams, standards schemes and individual museums we aim for legacy.

## 2.10

The evaluation of the Effective Collections pilot phase highlighted a risk to guard against in the full phase of the programme.

**The demise of regional agencies in England risks grants from programmes like Effective Collections replacing regional small grants programmes rather than offering something new that allows a step change in activity.**

This risk applies equally to other grant schemes in the sector, and is something to monitor through the first rounds of funding.

## 2.11

The full phase maintains its focus on long loans, permanent transfers of material and other forms of disposal as means of enabling improved use of collections. However, these are the outcomes that we seek from museums as a result of a shift in their approach.

**We want to see museums wanting to use their collections more, and developing their collections in ways that are sustainable and fit their purpose or mission.**

For example, museums might benefit from managing their collections within an overarching collections development policy that defines and links acquisition, loans, other uses of collections and disposal. By challenging museums to have a more strategic, thought-through approach than is required by traditional acquisition and disposal policies, we aim for Effective Collections to have a significant and long-term impact on individual museums and the sector as a whole.

## 2.12

The full phase of Effective Collections runs until April 2012 and is made up of the four strands of work described in the following pages. The strands offer different ways for museums to get involved in sharing and using their collections – including grants of up to £25,000, as well as a body of policy and advocacy work to continue the debate on effective uses of collections and the progress the sector has made to date.





## Case study

# National Portrait Gallery



In this pilot project six paintings and sculptures are on long-term loan (three-year renewable agreements) to six venues in the south west and north east of England: the Museum of Hartlepool, the Great North Museum, Lawrence House Museum, Lyme Regis Museum, Tiverton Museum of Mid-Devon Life and Torre Abbey.

By working with Effective Collections the National Portrait Gallery (NPG) was able to capitalise on work it had already completed to identify items from its collection that had not been loaned or displayed for at least ten years, and where the sitter had links to locations in either the south west or north east England. Effective Collections contracted a broker to work in each region with information about the available oil paintings and sculptures, and tasked them with finding interesting and appropriate borrowers.

The pilot project was completed as planned thanks to the enthusiasm of the people involved. It has been valuable in drawing out lessons to take into the full phase of Effective Collections. For example:

- The NPG reported a significant workload in preparing the loans and relationships with new borrowers that has an impact on the programme of work NPG are already committed to. However they were also clear about their objectives for the pilot project – for example to extend the reach of their loans programme as a national organisation and to test new ways of working. Other museums that receive funding will also need to match their project to their own strategic objectives (why they want to use a particular collection more) and therefore invest in the process as an organisation.
- The two brokers working on this project tested different ways of working with museums that were more, or less, familiar with the loans process and with an approach based on subject-specialist knowledge or on local networks. Both brokers came across challenges demonstrating that many museums need more support from brokers than just ideas and contacts – ranging from facilities reporting, to personal introductions to confidence building. This is reflected in the coaching role that has been created in the Main Fund.



- Both brokers contacted the hub in their area to investigate potential borrowers and reported on the value of the assistance they received to find enthusiastic museums very quickly. This indicates the benefits of using existing networks to coordinate activity and maximise the impact of Effective Collections projects.
- Almost half of the Effective Collections funding for this project was spent on transporting and installing the loan items, even though transport for these items was shared with other NPG and hub activities. Costs for transport add weight to the argument that this is the biggest practical barrier to stimulating loan activity.

## 3.1

The Main Fund is for museums to identify underused parts of their collections, and to work with the MA to increase their use, for example via long-loans or permanent transfers of material. Funding of up to £10,000 will be awarded six-monthly in four rounds, the first in September 2009.

## 3.2

The fund is aimed at museums where it can make a difference. There is no limit on the size of museum that can apply, but successful applications will make a long-term difference at an organisation and enable it to make a sustainable change in its practice for using collections.

Museums have different motivations for increasing use of their collections, so the Main Fund asks applicants to define the aims for the project, within given criteria, in line with their own strategic objectives. In addition to the primary public outcomes (such as long loans), the museum is encouraged to set other outcomes to benefit the organisation and its staff.

This means the projects are flexible to the needs of a given museum, but require an investment by the museum as well: directly in terms of staff time and some of the costs of loans and disposal, and also in terms of willingness to change.

## 3.3

The Main Fund builds directly on the experience of the pilot projects in the first two years of Effective Collections. It aims to provide a simple, modular framework that museums of varying size and type of collection can tailor to their particular needs. A key feature of the projects is that each museum will be allocated a coach from the MA to support development of their activities.

## 3.4

### Module a: collections review to identify underused objects

Module a enables a museum to work with subject specialists to review a collection, where such specialist expertise does not exist in-house. The primary purpose of the review is to form recommendations for the increased use of the collection (to be taken forward in module b). However it is also a collaborative and developmental process where staff at the home museum will gain knowledge, ability and confidence, both with a new subject specialism and with the principles of reviewing a collection.

## 3.5

In its simplest form, a collections review will involve an external reviewer visiting the museum to examine a collection, shadowed by the museum's curators and other staff (eg education, access staff and volunteers). However, the review can take other forms as suits the needs of the home museum, for example buddying of staff across different organisations to share collections knowledge, or study visits and learning by an in-house curator to apply to reviewing a collection. Museums will determine the structure of the review in the application process, but it must result in recommendations for the increased use of the reviewed collection.

## 3.6

If a museum has already identified underused items in its collection, it can apply to the Main Fund for modules b and c. However, it is a condition of receiving funding for a review that museums go on to undertake modules b and c.

## 3.7

### Module b: developing a workplan to make better use of objects

For module b, a museum works with a coach to plan activities to increase use of the collection that was reviewed in module a (or otherwise identified by the museum). The coach is on hand for the museum as a sounding board for ideas, a source of advice and contacts, and to guide the development of the workplan to ensure the museum achieves the aims and objectives for the grant. The coach's role is to build capability and confidence at the funded museum to undertake work to improve use of its collection.

## 3.8

The workplan might include loans, permanent transfers or other forms of disposal, redisplay at the home museum and other uses of collections and the cost implications, within given criteria, will be covered by Effective Collections as module c of the project. Development of the workplan is an essential part of the process for the museum to translate its aims for its collection into action, and to use the process to get buy-in from staff, visitors, the governing body and other stakeholders.

# Main Fu

## Case Study

# Hawick

## Egyptology collection

The Egyptology collection at Hawick Museum was reviewed as one of the Effective Collections pilot projects in 2008. Previously, in 2005, a questionnaire from the British Museum led to a selection of pots from the collection being identified as part of a dig led by the archaeologist John Garstang near Esna in southern Egypt 100 years earlier.

Having discovered such significant items in their stores, staff at Hawick were keen to improve their knowledge of the remaining parts of the collection, both so that they could better care for and provide access to the only Egyptology collection in the Scottish Borders.

Following a review and recommendations for use by the senior curator of Egyptian Scripts from National Museums Scotland, Hawick Museum:

- has developed a touring exhibition to visit other museum venues in the Scottish Borders region during 2009-10
- designed a hands-on learning programme for primary schools visiting the touring exhibition
- is building relationships with museums with similar collections, for example the Garstang Museum at the University of Liverpool
- staff have gained confidence caring for and working with Egyptology collections
- has prioritised documentation and made improvements to storage conditions including repackaging of pots.

### 3.9

Museums that are well equipped to plan the increased use of their collections are welcome to produce their workplan with minimal consultation with a coach so that they can devote greater proportions of funds to activities in module c.

### 3.10

#### Module c: implementing the workplan

In module c, the museum implements the actions identified in the workplan to make better use of its collection, with further support from the project coach if needed. During this module the museum achieves its objectives for the project: from the public benefits of greater use of the collection, to knowledgeable and reinvigorated staff, to the establishment of networks to share collections, expertise and learning from the experience.

# nd



# Special Project Fund

## 4.1

The Special Project Fund is for exceptional projects with museums to increase use of stored collections, primarily through sharing them. With grants of up to £25,000, awarded on the same schedule as main projects, we are seeking projects that achieve significant public benefit and serve as exemplars to the museum sector and wider partners of what can be done with collections, achieving maximum impact for public engagement, and for improving practice in museums.

## 4.2

The criteria and terms for this fund are deliberately broad to encourage innovative ideas, and a collaborative approach with the MA and other partners to develop applications and their ensuing projects. Loans, permanent transfers of material and disposal (as examples of increased use of collections) do need to feature in special projects, but as part of wider ambitions – perhaps joining Effective Collections funding with other sources, or a partnership project that reaches beyond the museum sector, or a coordinated approach from a number of museums.

Of central importance to these projects is a focus on:

- innovation and ambition of the project as a stimulating exemplar for the sector
- improved use of collections for demonstrable public outcomes
- impact on the museums involved
- sustainability of the benefits of the project
- legacy beyond the period of the project.

## 4.3

Museums that are interested in applying to the Special Project Fund are encouraged to contact the MA early in the process to discuss ideas. The MA will allocate a person to the special projects to consult in developing and running it. Timescales and funding models are flexible, however special projects are expected to take a year or more to come to fruition with a periodic release of funds in discussion with the MA.



## 5.1

Find an Object is a web listing service for loan and disposal items. Anyone familiar with freecycle, gumtree, or even ebay will recognise the concept: museums can post adverts offering objects, supplemented by pictures and background information, and other museums can respond directly to the advertiser to set up a loan or permanent transfer. Museums can also register an interest in borrowing or acquiring certain objects or types of material. The MA will matchmake these requests where it is possible to do so. We are also making links with museums, hubs and other networks to promote use of Find an Object as a regular port of call for sharing collections.

## 5.2

Find an Object is the simplest way for museums to get involved in Effective Collections. It has been developed in response to demand from the sector. It provides an interactive means of advertising available items. The List will continue to feature in Museums Journal with a monthly snapshot of the adverts placed on Find an Object. For more information see

[www.museumsassociation.org/objects](http://www.museumsassociation.org/objects)



# Find an Object



# Culture Change

## 6.1

The long-term legacy of Effective Collections depends on our work to change the culture of museums to expect to use collections more. Encompassed in this strand is work with partners on sector-wide policy and programmes led by others. Examples include feeding into the development of Subject Specialist Networks as part of Renaissance in the Regions, or national strategies for museums in Wales, or a review of accreditation. In addition, we will continue to lead research and advocacy work in consultation with the sector to push the debate on using collections.

## 6.2

### Key principles of loans

Barriers to lending are, anecdotally at least, well known in museums and primarily centre around cost, especially of transport, and also for couriers or conservation that are passed on by the lender. Other frequently cited problems are a lack of confidence dealing with larger museums and difficulty meeting strict environmental standards and other loan conditions.

## 6.3

As part of Effective Collections we have argued that these barriers should be reduced. However we found that, despite in-principle support (see 2.5), many museums are resistant to change in practice, even though practice varies enormously between museums. Therefore, we will go back to basics to establish a consensus on what the key principles of loans are, taken from the Code of Ethics for Museums. Using these as the basis, we will use existing research such as the National Museum Directors' Conference's 2003 report *Loans Between National and Non-National Museums* and working groups drawn from the museum sector to agree what the standard practice for lending within the UK should be.

For example, what are the acceptable and unacceptable reasons to refuse a loan request? What costs are reasonable for a lender to pass on to a borrower? And what parts of the loan process and ongoing care of objects should a borrower take responsibility for?

## 6.4

By answering these questions collaboratively, we hope to set clear guidance so that museums can understand what to expect of one another and can lend and borrow more confidently.

## 6.5

### Attitudes to risk

As discussed previously (see 2.8), many museums and individuals are risk-averse in their attitudes to using collections. Through the pilot phase of the programme we have repeatedly found in-principle support for freer sharing of collections, but seen fewer moves to significantly change practice. It seems that this approach stems from wariness around different types of risks: as well as physical risks to objects, there is an element of potential personal liability for taking a risky decision within an organisation (reflected in different decision-making by the director of a museum as opposed to a curator or registrar), and also potential reputational risk if it were known publicly that a museum made certain collections decisions. In response, we plan to undertake a project with partners to research attitudes to risk and investigate myths in the sector's perceptions.







## 6.6

The work will use public-attitude research to look at different types of risk, at the concept of permanence in a museum collection, and the risks the public are willing for museums to accept to get benefit from collections.

## 6.7

### Disposal

During the pilot phase of Effective Collections, the culture of the sector has changed considerably regarding disposal. In 2007 members of the MA approved changes to the Code of Ethics for Museums relating to disposal to move from a 'strong presumption against disposal' to a 'strong presumption in favour of the retention of items within the public domain' and accreditation changed as a result. The sector has also reacted well to the subsequent publication of the Disposal toolkit as a practical guide to museums undertaking disposal in 2008. This is a huge step forward in viewing collections more dynamically and using disposal as an integral part of collections management. However, there is room for greater use of the toolkit and for more action to review collections to make appropriate disposals.

## 6.8

As discussed in 2.7, there is potential for more of a shift in approach to disposal as museums feel the effects of unsustainable collecting practices.

**Museums should do more to review and prioritise the objects in their collections, using this understanding to inform collections development – for example categories for use of objects, better management and storage, increased loans activity and, ultimately, disposal.**

## 6.9

In 2009 and 2010 we will offer free training to museums in reviewing collections, along the same lines as the popular Disposal toolkit training in 2008. Planning a review and developing an assessment framework is a point that lots of museums struggle with: partly on the basis of available time and resources, and partly understanding the scale of the project. The training and associated case studies are designed to be practical ways of helping museums to engage with reviewing their collections.

## 6.10

We are also evaluating use of the Disposal toolkit alongside the Find an Object service, and in 2011-12 we will review the contents of the toolkit. If necessary, we will make adjustments in the light of any further changes in the culture of museums about disposal.



# Making Collections Effective



## 7.1

In 2007 the MA published an introductory report, *Making Collections Effective*, which outlined the aims of the Effective Collections programme and described how the pilot phase was going to work through a set of action points. Our work on the action points has progressed and brought to light a number of issues to take forward into the full phase of the programme.

## 7.2

**Action point 1:** The MA will work to increase the value placed on lending and borrowing by museums. As part of this, the MA will establish a Collections Strategy Group to sustain change in the culture of lending

Establishing the Collections Strategy Group has been key to progress throughout the pilot phase of Effective Collections. Made up of influential representatives from each of the UK nations; national, regional, and independent museums; and a range of sector agencies and funders, the group adds wisdom and value to the development of Effective Collections, and advocates better use of collections in a wider sphere. The group has also proven to be a useful forum for debate of other collections policy across the sector – ranging from Subject Specialist Networks, to the McMaster report, to environmental standards.

## 7.3

The pilot phase of Effective Collections has included advocacy within the sector and working with partners. As well as the Collections Strategy Group, it has also included a range of other activity:

- gathering together practitioners as an exploratory group to discuss the direction of Effective Collections
- regular meetings with individual museums, hubs, regional federations, related networks and strategic agencies, for example the Department for Culture, Media and Sport, the Museums, Libraries and Archives Council (MLA), CyMAL (Museums, Archives and Libraries Wales), Museums Galleries Scotland, the National Museum Directors' Conference, the Art Fund, the Heritage Lottery Fund, the Institute of Conservation, the Collections Trust and the UK Registrars' Group
- supporting related committees, or steering groups for other projects and publications, including the Heritage Lottery Fund's Collecting Cultures, University College London's Collections for People, the National Museum Directors' Conference's UK Affairs Committee, University College London's Collections review and the British Standards Institute's Code of Practice for Collections Management.

## 7.4

Our work with partners has been invaluable in understanding the nuances of the sector's approach to loans and disposal. It is also the major way of advocating a change in that approach and working for a shift in sector-wide policy. The full phase of the programme includes a greater focus on work in this area, both the work led by the MA and described in section 6, and by continuing to contribute to the wider work of the sector – for example in a review of accreditation by the MLA in 2009-10, or in the Arts Council England's National Strategy for Public Collections of Contemporary Art in 2009. The aim of this work is to ensure that Effective Collections has a lasting impact for all of the sector.

## 7.5

**Actions points 2 and 3:** The MA will develop a brokering service to matchmake loans and build trust between borrowers and lenders. The MA will support reviews of stored collections to find material that merits use in displays, either on long loan, through redisplay at the home museum or by permanent transfer. The reviews may also identify candidates for museums to consider for other forms of disposal.

Effective Collections has established nine pilot projects involving over 25 museums to test ways of providing expertise to review stored collections and broker loans. This practical experience has been invaluable in designing the Find an Object service and main and special funds in the full phase of the programme (see 2), and has identified barriers to loans and disposal that other areas of the programme are tackling, for example through development of training courses or research into approaches to risk in museums (see 6.5). Summaries of a selection of the pilot projects are included in this report, and see [www.museumsassociation.org/effective](http://www.museumsassociation.org/effective) for further details.

## 7.6

There has been a huge demand for collections reviews from museums, showing that there is a need for specialist expertise to unlock underused collections in the UK. In response to this, the full phase of the programme will provide more collections reviews (as a precursor to using the reviewed collections more) on a model that promotes the development of expertise by staff within the museum receiving the review. This more collaborative approach will facilitate greater activity with the reviewed collections in the future, independent of Effective Collections.



## 7.7

Pilot projects also tested the role of the broker in setting up loans. We found that museums of different sizes and with different experience of the loans process needed very different things from a broker and that it is difficult for one individual broker to be all things to all of the sector. In the full phase of the programme, we have recast this role as that of the 'coach'. Coaches will focus on:

- stimulating the ambitions of museums, for example getting organisational support to act on recommendations from collections review
- developing the ability and confidence of individuals in museums to undertake loans activity, and helping museums to plan for loans
- making contacts and developing networks.

## 7.8

**Action points 4 and 5:** To simplify and demystify lending the MA will produce a best practice guide to loans administration, including a model loan form. The MA will offer training in essential skills around lending and borrowing, with the aim of encouraging a more pragmatic approach by lenders.

Effective Collections has worked to reduce the barriers to loans by providing training and working to demystify the loans process. In 2007 the MA published Simple Loans Administration, a discussion paper advocating the use of straightforward, basic loan agreements with the majority of long-term loans. Since 2006 the MA has run several conferences and developed training around easier lending, access to stored collections, touring exhibitions, handling and packing, condition reporting and using the Disposal toolkit. All of these resources have been well received and the MA will continue to provide both existing and new training and conferences. However, the MA has also seen that this approach only solves a part of the problem to increase sharing of collections in UK museums.



## 7.9

The findings from an Effective Collections proposal in 2008 showed that many museums support increased lending in theory, but struggle to put this into practice. In other words, museums agree that loans are a good thing, but they do not necessarily see them as core. The full phase of Effective Collections includes work to approach this more philosophical barrier to lending and borrowing, notably with work on attitudes to risk and on the key principles of loans (see 6.2).

## 7.10

**Action points 6 and 7:** The MA will propose changes to its guiding principles on disposal to its annual general meeting in 2007. The MA will publish a toolkit and provide associated online materials to support museums undertaking disposal.

One element of using stored collection better is to review and rationalise collections so that they remain relevant and manageable. Building on the conclusion from Collections for the Future that 'disposal is not risk free, but neither is unthinking retention' the MA reviewed the key principles of disposal as contained in the Code of Ethics for Museums. This resulted in a change to the code that was approved by MA members at the annual general meeting in October 2007. And in support of the changes, the Disposal toolkit was published in February 2008 as a practical guide to museums undertaking disposal. The MA also ran an oversubscribed series of workshop training sessions in using the Disposal toolkit throughout 2008, and will continue to offer this to museums as part of its regular training schedule.



## 7.11

The Disposal toolkit advises museums to undertake disposal as part of a whole-scale collections review, rather than making ad hoc disposal decisions motivated by short-term need or financial difficulties. However, the workshops in 2008 showed that many museums struggle to engage with reviewing whole collections: partly on the basis of available time and resources, and partly for the scale of the project. So, in 2009-10 the MA will follow up the Disposal toolkit training with a series of workshops on planning a collections review (see 6.7).

## 7.12

**Action point 8:** The MA will develop an Effective Collections web resource to contain information and guidance about loans, disposals and reviews of collections. This will include a way for museums to register their interest in lending, disposing or receiving objects under the Effective Collections programme.

Over the course of the pilot phase the MA has developed and gathered together a body of research, discussion papers and case studies relating to loans, disposal and collections review. As part of the launch of the full phase of the programme, the Effective Collections section of the MA website will be updated to include all of these resources. The Find an Object service (see 5) will also be available to advertise available loan and disposal objects.



## Case Study

# Collections Review Project in the north west

In 2007 Renaissance North West began a programme to review collections in the region. With an awareness of changing attitudes to disposal, both through the MA's work and examples in the region, the Collections Review Project was set up to:

- promote peer reviews as a means of identifying and prioritising strengths in collections
- promote responsible disposal
- develop a sustainable regional infrastructure to support peer reviews
- establish a Collections Review Board to support disposal, acting as a sounding board for museums considering disposal before they make their final decisions.

In 2007-8 the Egyptology collection at Salford Museum and Art Gallery and the print loan collection at Gallery Oldham were both reviewed, with a further six reviews completed in 2008-9.

Disposal was never a prescribed outcome of the review process. The project has revealed that there are no 'quick wins' as it is a time-consuming process.

At Salford there are obvious transfers to be made, such as reconciling collections that are dispersed among neighbouring museums in Greater Manchester and Liverpool and eight local history societies in Salford will be consulted about the future use of the collection. In fact, the consultation phase has been written into the museum's business plan for 2009-10 and elected members are engaging with the process.

At Gallery Oldham the review highlighted the value and significance of the collections and has led to increased use of the prints such as exhibitions and educational print-making workshops. The review was also used as an opportunity to train staff and improve the storage of and public access to the collection.

The process has encouraged cross-departmental team working and, significantly, the review methodology is viewed as a useful tool in terms of advocating against unethical disposals.

For more information about the Collections Review Project in the north west visit:  
[www.renaissancenw.org.uk](http://www.renaissancenw.org.uk)





#### Footnote p3

<sup>1</sup>The MA sent a survey to all national and hub museums proposing to define the set of skills needed by borrowers to care for objects on loan to them. The aim was that borrowers who could demonstrate those skills among their staff (for example via a future qualification or accreditation scheme) would find it easier to borrow. With 28 from 70 responses, 23 museums expressed in principle support for the idea, and many respondents made very helpful comments on the specifics of the proposal. However, out of those 23 respondents expressing in principle support for the proposal, a significant number expressed serious reservations or concerns - some so substantial that it seemed unlikely that a scheme to accredit borrowers would have much impact on their lending practice. Other respondents who indicated that they would change their lending practice suggested that they would only do so in quite limited circumstances. The conclusion we reached was that attitudes in museums do not yet prioritise the benefits of lending enough, or see lending as sufficiently core, to accept the risk involved.

The Museums Association would like to thank colleagues from across the sector, especially members of the Collections Strategy Group, participants in Effective Collections pilot projects and Anne Murch & Associates, whose ideas, analysis and enthusiasm has made the development of the Effective Collections programme possible.

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# Summary

MUSEUMS  
ASSOCIATION

We invite you to participate in the four strands of Effective Collections:

## Main Fund

Funding of up to £10,000 per project for museums to review their collections and make better use of them as a result.

Funding is available for:

- **module a:** collections review to identify underused objects
- **module b:** developing a workplan to make better use of objects, eg on loan and via transfer or alternative forms of disposal
- **module c:** implementing the workplan.

There are four project rounds, six-monthly from September 2009. Any accredited museum, or museum working toward accreditation, can apply and museums that don't need a collections review can begin at module b.

## Special Project Fund

Funding of up to £25,000 per project to museums and partners for innovative projects that include loans and transfers. The criteria for these grants are based on:

- public outcomes
- impact on the museum, the sector and beyond
- innovation and ambition
- legacy and sustainability.

There are four project rounds, six-monthly from September 2009. Any accredited museum (or working towards), or partnership of organisations that includes an accredited museum (or working towards), can apply.

## Find an Object

A web listing service to advertise loan and disposal objects and promote their take-up by other museums and public venues.

Museums can post adverts offering objects, supplemented by pictures and background information, and other museums can respond directly to the advertiser to set up a loan or permanent transfer. Museums can also register an interest in borrowing or acquiring certain objects or types of material. The MA will matchmake these requests where it is possible to do so.

## Culture Change

A body of advocacy, research and campaigns working with partners to change the culture of museums, such that they expect to make better use of their collections. This includes significant pieces of work led by the MA to promote the key principles of loans, and on attitudes to risk. It also includes contributing to policy development across the sector with partners.

See the Museums Association website for more information, and for details of applying for funding:  
[www.museumsassociation.org/effective](http://www.museumsassociation.org/effective)