

# Developing a Collection Strategy: Do we need to collect and keep everything?

- Collecting is one of the key functions of a museum. But it brings with it many critical issues and problems. Today, more and more museums are looking for answers to questions such as: How to collect in a strategic and efficient way? How to look after the collected objects properly? And how to use these objects in open and stimulating ways? This paper looks at the usefulness of a Collection Development Strategy and how it can offer great help in managing a museum's collecting activities.

Key words: museum collections, collection strategy

## INTRODUCTION

This article is not about why museums collect objects or what they should collect. It is about the process of conducting research, collecting objects, developing a collection and managing it in an efficient and purposeful way. In recent years, more and more museums have come to realize that they have problems with their collections: not sure what to collect, too many objects in the collection storage, difficult to store the objects properly and safely, not easy to find a particular object when it is needed, not enough time to document the objects, etc.

A very useful tool that many museums are using to address these issues is what is called a Collection Strategy. Some museums call it a Collection Process, or a Research and Collecting Policy. This paper is about what a Collection Strategy is, why a museum needs one and what it contains. It is also about how to develop a realistic and useable Collection Strategy. The paper also looks at two

very important moments in the life of a museum object: when it is acquired and when it is de-accessioned (if need be). I will use examples from the Canada Science and Technology Museum to illustrate my comments.

## WHAT IS A COLLECTION STRATEGY?

Simply put, a Collection Strategy is a document or a series of documents that provide a framework for the research and collecting activities of a museum. It fulfills a number of objectives in a museum. It directs the future scope and direction of collection and research by identifying and prioritizing subject areas or themes requiring research and collection development. The usefulness of a Collection Strategy is not limited to research and collecting. It also helps in providing physical and intellectual access to the museum's collection through its programs and exhibitions.

A good Collection Strategy outlines an intellectual framework, arising from the legal mandate of the museum, upon which the collection development and research activities of a museum can be based and resources allocated to those activities.

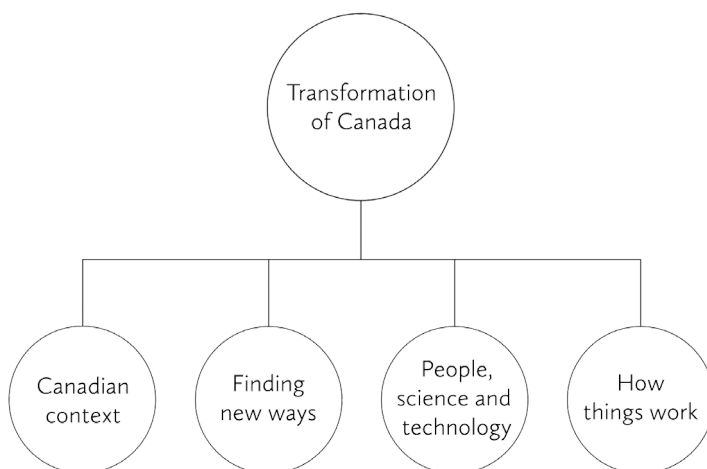
In providing a direction and priorities for research and collecting, a well-designed Collection Strategy will contain general procedures and guidelines, standards for developing and using the collection (what objects to collect, how to store them, how to use them in exhibitions and programs) and best practices for the management of the collection from registration to loans. A Collection Strategy also provides timely information that can be used in the development and monitoring of annual group and individual work plans.

A good Collection Strategy is not an abstract document that is sometimes referred to and used. It contains very concrete tools that guides the various processes and procedures associated with the development and management of a collection, tools such as Terms of reference for the various committees, Guidelines for Acquisition, Guidelines for Disposal, Guidelines for Conservation and Restoration and Guidelines for different components of the collection such as artwork, toys or spare parts. A Collection Strategy brings rigour and consistency to the entire process centred on the collection.

## THE CASE OF THE CANADA SCIENCE AND TECHNOLOGY MUSEUM

The Canada Science and Technology Museum opened in 1967. It is Canada's only comprehensive and national science and technology museum. By the mid-1980s, the museum realized that it was facing problems in its research and collecting activities such as the lack of focus in collecting, how to decide what to collect, limited resources to do the research and the collecting, as well as limited storage space. So the museum decided to develop its own Collection Development Strategy; this was achieved in 1989. The museum's *Collection Development Strategy* (CDS) was modeled after the strategy used by the Henry Ford Museum in Dearborn, Michigan USA. The Canada Science and Technology Museum also based its CDS on an intellectual framework called the *Transformation of Canada*.<sup>1</sup>

This intellectual framework – the *Transformation of Canada* – focused on the role and contribution of science and technology to the transformation of Canada as a country. It provided a new, more focused approach to the museum's research and collecting activities as well as the development of exhibitions and programs.



The *Transformation of Canada* framework has four sub-themes:

- Canadian Context; all research and collecting is done in the context of the history of Canada. All objects collected must have a connection to this history, through people, events or milestones.

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1 Cf. *Collection development strategy*, CSTMC, 2014.

- Finding New Ways; telling stories of Canadians who found new ways of doing things through inventions or new applications.
- How “Things” Work; as a technology museum, the museum wants to show visitors how technologies work and how basic principles of science can be applied.
- People, Science and Technology; science and technology play an important role in people’s lives. The museum wants to show that through examples and stories taken from the lives of Canadians.

In deciding whether to acquire an object or not, the Canada Science and Technology Museum takes into account a number of elements. These elements fall into two main categories. One category is about the object itself. Curators look at the condition of the object to determine if it is complete and its parts are original. They also look at the rarity of the object and the extent to which it is representative of its type. Another element that is taken into consideration is what is already in the collection; are there similar objects in the collection and are they in better condition?

The other category of factors to consider when acquiring an object relate to its provenance – where does it come from and who owned and used it. The provenance of an object is very important as it refers to an object’s historical importance, its possible association with an historical Canadian person or event (illustrating the *Transformation of Canada* framework).

The *Transformation of Canada* framework with its four sub-themes quickly proved very useful in determining where and how the financial and human resources of the museum would be used. Until 1989, much of the collecting in the museum was based on curatorial preferences. The CDS provided people with objective collecting criteria to assist them in being selective and objective in what they were collecting. The CDS also assumed that the collection is a living collection, with objects moving in and out of the collection through initially acquisition then possibly through de-accession or loans.

The Canada Science and Technology Museum, being Canada’s only national science and technology museum was created with a very broad mandate.

“To foster scientific and technological literacy throughout Canada by establishing, maintaining and developing a collection of scientific and technological objects, with special but not exclusive reference to Canada, and by demonstrating the products and processes of science and technology and their economic, social and cultural relationships with society”.<sup>2</sup>

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2 *Museums Act*, S. C. 1990, c. 3.

With such a broad mandate, curators found it difficult to know what to research and what to collect to support and illustrate this research. Applying a criterion that the objects collected have to relate to the history of science and technology in Canada helped in narrowing the research and collecting activities of the museum.

At the same time, the notion of “provenance” became more important in collecting; the collected objects had to be representative of the diversity and vastness of Canada. In this context, provenance is defined as “the full history and ownership of an item from the time of its discovery or creation to the present day, through which authenticity and ownership are determined”. Another important aspect of implementing the CDS in the museum was that it encouraged active rather than passive collecting, actively looking for objects that were not in the collection but should be rather than wait for the objects to be offered to the museum (Fig. 1).

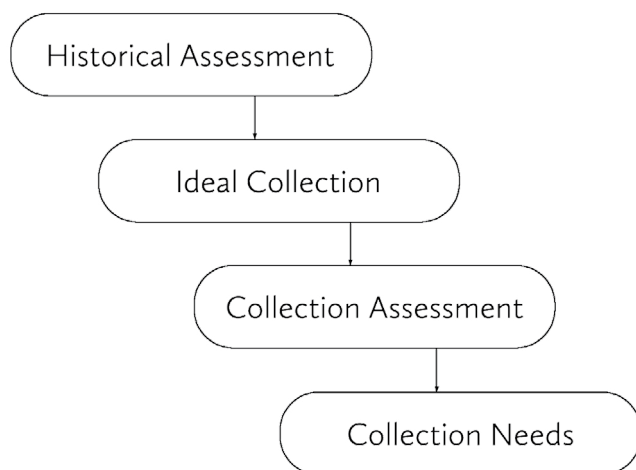


Fig. 1. The four main steps of a Collection Development Strategy - A Collection Development Strategy contains four main steps as illustrated here. At the centre of the process is the notion of the “Ideal Collection”. Simply put, the Ideal Collection contains the key objects that are necessary to illustrate the history of a particular science or technology in a particular timeframe. Once an Ideal Collection has been defined, the next step is to create a profile of the current existing collection, compare that profile with the Ideal Collection and determine the future collecting needs.

## **THE HISTORICAL ASSESSMENT**

An historical assessment is the result of a major research project that presents the development of a particular science or technology within a specific time period and even a specific geographical region of a country. One of the results of this research is a list of the key objects that illustrate as completely as possible this development. The final document is reviewed by one external and one internal reader, and approved by the museum's Collection Development Committee.

## **THE IDEAL COLLECTION**

An Ideal Collection contains most, if not all, of the key objects needed to illustrate the development of a particular science or technology in the Canadian context. This list of objects was determined during the research phase known as the historical assessment.

## **THE COLLECTION ASSESSMENT**

In doing a collection assessment, a curator compares the museum's existing collection with the Ideal Collection. The result of this comparison is a collection profile. A collection profile identifies areas of over representation (duplication) or of gaps in the collection. It lists the objects that are not in the collection and should be, as well as the objects that are in the collection and do not really belong in it.

## **COLLECTION NEEDS**

A well done collection profile will in turn identify the collection needs. Collection needs are twofold: the collecting that has to be done to fill the gaps in the collection or the identification of the objects that do not belong in the collection and their de-accessioning.

Once the collection needs have been identified, it is much easier to develop a strategy to acquire the missing objects in an organized way, or to dispose of the objects no longer needed in a legal, transparent and ethical way.

## ACQUISITION AND DE-ACCESSION

The acquisition and de-accession (when necessary) of an object are two key moments in the life of an object. Acquisitions should of course be based on rigorous research and follow the Collection Development Strategy. De-accessioning an object is a more difficult process. In many countries it is impossible to de-access objects once they have been included in the collection. In such cases, it is obviously easier to only acquire objects that really belong in the collection instead of acquiring objects and then having to dispose of them later. Another possible approach is to acquire an object but wait before registering it as part of the collection; this wait allows for further research and confirmation that the object does belong in the collection. In Canada as in many countries around the world, de-accessioning objects is legal as long as the museum follows a rigorous and transparent process. At the Canada Science and Technology Museum, all de-accessions go through the Acquisition Committee. Large de-accessions go through the museum's Board of Trustees. Once the decision of de-accessioning an object has been made and approved, the museum must follow a strict process. First, the object is offered to other museums. If no museum is interested in acquiring the object, it can be disposed of through other channels such as Crown Assets (run by the government), sale or even an auction. It is imperative that the entire process of disposing of an object be transparent, ethical and legal.

The reasons for disposing of an object through the process of de-accession are very much the opposite of the reasons invoked for acquiring an object in the first place. In deciding whether to dispose or not of an object, the museum takes into account on the one hand the condition of the object, its rarity and the presence of similar objects already in the collection, and on the other its provenance and its association with an important person or event in Canadian history.

Like many other museums, the Canada Science and Technology Museum does not acquire an object that comes with conditions – for example “I will give you this object if you promise to display it.” It also does not acquire a complete collection only to keep a few objects. In the case of a donation, the transfer of ownership from the donor to the museum is formalized by a signed gift agreement, which states:

“I, the undersigned donor, hereby give absolutely to the Canada Science and Technology Museums Corporation the object(s) listed herein and, in so doing, I understand and agree that the object(s) may be retained, displayed, loaned, disposed of, or otherwise dealt with in such a manner as the Corporation may deem to be in its best interest.”<sup>3</sup>

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3 CSTMC's *Guide to donating or selling objects*; more information on: <http://techno-science.ca/en/join-support/guide-to-donating.php> (2 November 2016)

Such a gift agreement makes it very clear that the museum is the new owner of the object and that it can handle the object as it sees fit.

## THE COLLECTION RATIONALIZATION PROCESS AT THE CANADA SCIENCE AND TECHNOLOGY MUSEUM

In 2012, the Canada Science and Technology Museum put in place a pilot project called the *Collection Rationalization Process* (CRP). The museum decided to undertake this pilot project because collection storage was estimated to be at 130% of capacity, the curators were not acquiring important large objects because of the lack of space, and many objects already in the collection had never been looked at.

The main objective of this pilot project was to determine how well the collection of the museum was “rationalized”, that is to what extent was the collection well organized and documented. Another objective was to determine how many objects in the collection could be disposed of to free up storage space for other objects, this was not the main objective.

For this pilot, the museum curators and collection managers took 5 storage bays of objects acquired before 1989 and went through each object to confirm its provenance, condition, completeness and historical significance. They found that about 10-15% of the objects did not belong in the national science and technology collection. Some were missing too many parts or contained hazardous materials. Others did not have good documented provenance. In some cases, the museum already had better and more complete similar objects in its collection. And finally, a few objects had no connection to the theme of the *Transformation of Canada*.

This pilot project required planning and the allocation of resources over a long period of time. Collection targets - such as how many objects to look at in one year - were put into the work plans of individual curators and collection management staff. Volunteers were used to do some of the basic work. One activity that worked very well was organizing twice a year intense work sessions of one full day with everyone connected to the collection taking part.

Other aspects of the pilot project that were very important included making sure that all the information related to an object was updated at the same time, such as physical location, related documentation and archival material and recording the process in detail, in particular the decisions made about



each object for future reference and to avoid uncertainty later. Finally, special attention was given to communicating the process to the staff of the museum to make it clear that the museum was not selling its collection.

A difficult part of the process turned out to be the disposal of the de-accessioned objects. In many cases, in particular in the case of large objects, it was hard to find a museum that was interested in acquiring the objects and paying for the shipping of the objects.

## **DEVELOPING AND IMPLEMENTING A COLLECTION STRATEGY**

A Collection Strategy is much more than just about adding objects to the collection. It guides all the aspects of museum work related to research and collecting. As has been described above, a Collection Strategy also plays a key role in organizing and managing the collection. This starts with having objects that really belong in the collection, having the space and resources to look after it well, having detailed documentation about the objects, knowing where the objects are and their condition, and having clear procedures and guidelines for acquiring and disposing.

The development of a Collection Strategy should involve people from different departments of the museum. It starts with the mandate and the mission of the museum. A good starting point is to ask such questions as: Why is the museum collecting? What should the museum collect? What should the museum do with what it collects? Are other museums collecting the same objects? It is very important that the museum be clear about the reasons why it thinks it needs a Collection Strategy. The development of a Collection Strategy is a very intensive and time consuming process. And the staff must be prepared to put the new Collection Strategy in action once it has been developed. So having a clear understanding of why a museum needs a Collection Strategy is crucial in it being accepted by staff and put in use. Implementing a Collection Strategy will change many activities in the museum and it will also change many aspects of people's work. It will require a big change in the work culture of the institution.

The museum should also identify clearly what should be in the Collection Strategy; for example, which procedures, guidelines and policies related to research and collecting should it cover. A Collection Strategy must also take into consideration the legal and ethical aspects of collecting. For example, a

museum situated in a country that does not allow museums to de-accession objects once they are part of their collections will have to take this legal aspect in its collecting guidelines.

A museum developing a Collection Strategy for the first time should make it realistic and plan on reviewing it after a few years. It is crucial that the strategy, once implemented, be followed in all situations and by all staff connected with research and collecting. Documenting the process – what works well, what is problematic – will be most useful when the time comes to review the strategy.

## CONCLUSION

In recent years, more and more museums have developed their own Collection Strategy or Collection Policy. They have done so in response to a growing number of problems such as what to research and collect in a world that keeps producing more and more objects, how to store and preserve these vast collections and how to use the collections in a meaningful and ethical fashion. These museums have found that having a Collection Strategy in place is very helpful in deciding to which research and collecting activities they should allocate financial resources and staff time. Developing a complete and practical Collection Strategy is not an easy undertaking; it is time consuming and requires involvement from all areas of a museum. But it is a very worthwhile exercise and one that will benefit the museum in countless ways.