checklist for sections to address in department policy and procedural document(s)

this checklist serves as an outline for sections that should be included within each department’s policies and procedures, which are now required by all C&R Departments. These documents, once finalized, will be kept on file with the Registrar’s Office. If you have any questions, please see the Registrar.

acquisitions
how does your department handle acquiring objects/artifacts/specimens? Where are they placed prior to being accessioned?

accessions
how does your department handle accessions? Who is responsible for filling out paperwork or ensuring proper permits/permissions/documentation are present? What is the timing in regards to accessioning vs. cataloging?

deaccessions
how does your department handle deaccessions? Who is responsible for filling out paperwork or ensuring the appropriate individuals have been notified?

disposal
what are the means of disposal considered appropriate for your department? Are there hazardous waste issues to be considered? Do you need special permissions?

cataloging
how are objects/artifacts/specimens in your department cataloged? What is the timing in regards to accessioning vs. cataloging? What information is important to record? Who engages in cataloging? What database system does your department use and how is the catalog organized? Do you have more than one catalog?

inventories
how often does your department engage in full or partial inventories? What information is recorded or verified during these inventories?

outgoing loans
how are outgoing loans handled in your department? What paperwork is necessary and who completes this paperwork? Are there restrictions on what can be loaned and to where? Are there special considerations for packing and shipping loans?

incoming loans
how are incoming loans handled in your department? What paperwork is necessary and who completes this paperwork? Are there restrictions on what can be accepted as a loan?

collections care
what kinds of handling skills are needed for the objects/artifacts/specimens in your department? Are researchers, students, and volunteers allowed to handle collection
material? What training must they have prior to handling? Are objects/artifacts/specimens cleaned? If so, what methods and materials are used? How are collections labeled? What is the labeling system used and how are labels applied to objects? What kinds of storage or storage materials are used in your department? How are objects transported within and outside the museum?

**Destructive Analysis**
Does your department allow destructive analysis of collections material? If so, explain internal policies and procedures regarding destructive analysis. If not, please explicitly state this in your policy.

**Photography and Reproductions**
Do you engage in or work with photography within your department? What kinds of photos do you take or maintain (i.e. for publication, research, identification, conservation, etc.)? What methods do you use in your department for photography and where are your images stored? What software do you use to facilitate photo taking and/or editing? What other forms of reproduction are used in your department (i.e. scanning, casts, 3-D scanning, transfer of audio recordings, etc) and what methods are used to create these reproductions? What documentation is necessary for these reproductions? How are reproductions stored? Are your reproductions treated as collection items? If so, how are they cataloged and accessioned?

**Record Keeping/Documentation**
What records do you maintain copies of within your department, and where are these records stored? What do you keep hard-copy records of? And what do you keep digital records of? Who maintains these records? Are there internal back-ups of all digital data? Where are your back-ups stored?

**Research and Access**
Who has physical access to your collections (personnel both internal and external to the Museum)? Are there restrictions on who your department will allow to come in and do research or what objects/artifacts/specimens can be researched? Who approves access to your collections? Do you allow students, researchers, or volunteers, to take any documentation (hard-copy or digital) out of the building? If so, what documentation can be removed and what documentation must stay on-site?

**Emergency Preparedness and Response**
Are there particular considerations with regards to emergency preparedness, response, or salvage that are unique to your collections? If so, state them. If not, reference the Collections Emergency Response and Recovery Plan (CERRP).

**Exhibitions**
Does your department have objects/artifacts/specimens on permanent exhibit? Where are they on display? Who is responsible for monitoring this material? Are there any special requirements for material on display? Does your department engage in temporary exhibits? What is the process for developing or implementing temporary exhibits for your department?

**Other**
Are there other issues, activities, or considerations unique to your department that
should be described in a procedural document?