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## Summary Guidelines to Planning a Collection-wide Location Inventory

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# Summary Guidelines to Planning a Collection-wide Location Inventory

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## Introduction

Although museums have existed on the American landscape since the time of Thomas Jefferson, museum science—the practice of using a standardized methodology for accessioning, cataloging, and maintaining museum collections—is a relatively new discipline. This being the case, many long-established museums and historical societies across the country find themselves playing catch-up in their record keeping and collections care practices.

The reasons to implement standard museum practices are both practical and philosophical. On the practical level, a museum must physically keep track of its collections for research, exhibition, and insurance purposes. If a museum does not know what the collections hold or where the materials are located, innumerable man-hours can be lost searching for objects or information. In the event of a catastrophic incident, the lack of a comprehensive inventory is disastrous when attempting to determine the extent of losses and file an insurance claim to pay for the recovery of surviving objects.

Philosophically, knowing that a museum or historical society has inventory and cataloging practices in place, reassures donors that the items they give are both respected and valued by the institution. Further, while a collections management system will not guarantee the receipt of grant monies, adopting good practices helps assure granting agencies that the institution is making a good-faith effort to follow sound and ethical principles to protect its collections.

## Planning

Disorganization is the death knell of any project that requires a lot of detail work and relies heavily on volunteer labor for completion. If volunteers do not see the result of their work or are called upon to repeatedly backtrack to correct for oversights in planning, enthusiasm wanes and projects can stall indefinitely.

- **Set Goals**—Before starting an inventory project, identify both short- and long-term goals. A short-term goal may be to inventory all collections while a long-term goal may be to institute a computerized cataloging and inventory tracking system.
- **Establish Objectives**—Once short- and long-term goals are identified, establish measurable objectives—or steps to take—to accomplish each goal. Objectives may include creating a paper and possibly a computerized recordkeeping system to accurately record inventory and collections information; prioritizing exhibit or storage locations to inventory; creating a project schedule; recruiting volunteer labor; and providing training to volunteers in the inventory process and the appropriate care and handling of objects.

Small museums with even smaller budgets need to maximize resources by planning to accomplish as much as possible in a single effort, while avoiding the risk of bogging down a project and discouraging volunteers by attempting to do too much at once.

- **Review short- and long-term goals and objectives**—Identify logical sequencing to avoid backtracking.
- **Evaluate objectives**—Identify steps that can be combined to eliminate redundancy and capitalize on the work being done.

For example, if one objective is to conduct a shelf-by-shelf inventory of the holdings and a second objective is to take digital images of all holdings, advance planning provides an opportunity for volunteers to combine both efforts in a single activity. As a result, volunteers feel more productive, physical handling of collections is reduced, and the result yields more complete records for the institution at the end of the project.

### **Laying the Groundwork**

Assembling and organizing all original collections documents is the first step in conducting a large-scale inventory project. It is necessary to know what information the institution has in-hand and what information needs to be collected through the inventory process. It is also important for personnel supervising the inventory project to have reliable, working knowledge of the institution's documented holdings.

All original accessioning records and associated documents should be gathered and organized with input from individuals most familiar with the collections and the current recordkeeping system. A reliable filing system should be established that documents donors as well as each individual object in the collections. All files should be kept in a safe, secure location and plans made to create either a paper or digital back-up filing system maintained in a second secure location, to reduce risk of catastrophic loss.

In many cases, the only information available about particular objects or donations may be in the form of "institutional knowledge," or information the director or curator maintains in their head but that is not written down. As part of assembling documentation for the collection, all "institutional knowledge" should be committed to paper and filed with other relevant documents.

### **Documents**

Documentation to collect, review, and file as appropriate, includes:

- Original accessioning logs
- Original intake records
- Original donor documents
- Original accessioning records for each object
- Insurance inventory records
- Current location inventory
- Records of objects on loan to the museum
- Records of objects on loan from the museum
- Records of objects deaccessioned or destroyed

As the physical inventory of the collection progresses, each of these documents will need to be accessed. In some cases, many of these documents will need to be created. The only way to establish what documents are needed is to determine what documents already exist.

## **Numbering**

The first step in the registration process—the process of creating an official written record for each object in the institution’s collection—is to establish a numbering system. Accession numbers are assigned when an object is accepted into an institution’s permanent collection. Frequently, smaller institutions develop multiple, idiosyncratic numbering systems that incorporate donor names, initials, or other signifiers, the year of acquisition, and a sequential number within a specific donation. Often the logic behind idiosyncratic numbering is lost over time and a potentially confusing and cumbersome system remains in place as a legacy. Prior to conducting a large-scale inventory, review the existing numbering system to determine if it is effective or if a more standardized approach should be adopted.

Once the numbering system is reviewed, determine how any new numbering system will be implemented. If the existing system is to be continued, decide how artifacts lacking accession numbers will be identified and marked by volunteers during the inventory process. Consider adopting a temporary numbering method such as using unbleached, cotton twill tape and acid-free cardstock to create archival drop-tags that can be gently attached to objects not marked with accession numbers. Do not use pressure-sensitive adhesive tags or any other temporary tagging system that involves the use of inks or adhesives.

## **Cataloging**

Recording the accession number and location of objects in the collection is an important part of the cataloging process. Prior to conducting a large-scale inventory, review the institution’s cataloging system to determine if there is other information that can be quickly and easily collected by volunteers accessing objects, which may be used as the seed for a subsequent project to organize storage, re-house objects, or fully catalog the collections.

## **Imaging**

With the advent of digital cameras, visually documenting museum collections is easier and more affordable than ever before. Photographing objects is an important stopgap measure that an institution can take until full cataloging can be completed. Inexpensive color or black and white printouts of digital images document condition and can be added to each object’s accession file to help with future identification and cataloging. Though digital images do not replace the need to catalog the collection, they immediately document an institution’s holdings for both general inventory and insurance purposes.

- Identify the image resolution (i.e. file size) necessary to best document the collection. The higher the file resolution, the more versatile and useful the image. The trade-off is that larger file sizes require more digital storage to archive.

- Determine how digital image files will be identified and archived in order to maximize their usefulness. If an image cannot be located or accessed, it creates a greater burden than benefit.
- Identify and acquire the technology necessary to take, store, print, and retrieve digital images. Set up the technology in a secure location and determine who will be responsible for uploading and recording images in the system.

## Workspace

A comprehensive inventory of collections will record more than an object's number and location. The inventory process will require volunteers to piece-by-piece, match objects to collection documents as questions arise about the origin of items in the collection. Conduct a walk-through of the institution with a critical eye toward available workspace. With proper collections care and handling and worker safety in mind, determine if the space available in galleries and storage areas is ample for volunteers to work safely and comfortably while conducting the inventory.

- Is there ample space to set up a walk-around workstation that includes a stable, padded table to hold objects being inventoried?
- Is there space for the volunteer to sit comfortably to write, review or create records, and potentially number artifacts?
- Is there space for the volunteer to take digital images?
- Will specific objects require two or more people for safe handling? If so, is space ample for two or more workers to move around safely?
- Will ladders be required to reach certain objects?
- Will temporary task lighting be necessary to conduct the work?

## Location Record

Museum Location Inventory			
Accession #	DHS321	Old ID #	B96-04      Status: Storage
Description:	Penobscot Fruit Basket		
Location:	Building: Barn	Room:	Loft Storage
	Unit: C	Number:	4

**Figure 1: A simple, customized FileMaker Pro database can record basic object information collected during a location inventory. Data shown are fictionalized.**

As volunteers conduct the location inventory, each object's accession number, status (whether on exhibit or in storage), and location will be recorded. In addition, volunteers should record a brief, five-to-six word description of the item as a way to aid future identification. Description information may be based on the volunteer's observation and knowledge of the items they are inventorying,

information from the director, curator, or project supervisor, or from collections documents.

In cases where no accession number exists, volunteers will turn to original collections documents to determine an object's origin and assign numbers as instructed by project personnel.

Prior to starting the inventory process, determine the most feasible method of recording and managing data created by volunteers. Options include:

- Create a simple, customized database (Figure 1; Figure 2).
- Create a running, paper log in a loose-leaf notebook.
- Create a card catalog.
- Create a paper file system.

One approach may be to have volunteers create individual catalog cards during the inventory process with information from the cards being entered into a computerized database by other volunteers. Importing digital images to the inventory database will help provide a visual record for each object, electronically attaching the object's photo to its catalog number and location. This approach addresses the need to logically identify, store, and retrieve images captured by volunteers.

Information recorded in a FileMaker Pro or Access database can also be exported to new database formats and alternative applications, so the work done to assemble the data is not lost. Whatever method of record keeping is selected, accessibility, portability, and retrievability should be given priority consideration.

Museum Location Inventory						
Accession #	ID1	Description	Status	Building	Unit	No.
DHS321	B96-04	Penobscot Fruit Basket	Storage	Barn	C	4
	B101-97	Tin shoe horn	Storage	House	GG	16
	B-12-67	Pitch fork	Exhibit	House	West	
	T-1978	Leather Child's Shoe	Exhibit	House	Floor	
	1967.05.1	Butter churn	Storage	Shed	Bin	3
	C98.13	Wooden nail cask	Missing			
	NS67.24	Account Ledger	Storage	House	Drawer	5

**Figure 2:** The same customized FileMaker Pro database shown in Figure 1 can output information in a number of report formats, maximizing the usability of information recorded. This report draws on the same data set in Figure 1 but is set up to replicate a standard accession log format. Data shown are fictionalized.

## **Conclusion**

Identifying objects and recording their location in a museum's storage or gallery space is an important part of a collection inventory, but it is only one part. A comprehensive location inventory builds the foundation for subsequent collections management projects. Advance planning is necessary to make certain the energy and effort invested by project personnel and volunteers is not wasted. Setting short- and long-term goals and objectives provides a clear vision for all involved and ensures that work stays on track. Laying the ground work by assembling and reviewing all existing museum records, and evaluating the institution's numbering and cataloging system, puts project personnel on stable footing when it comes to planning for the collections' care and how to organize volunteer efforts to meet the immediate project objectives. Determining the information to collect during the inventory process and how to organize and store that information will ensure the long-term accessibility and retrievability necessary to move the institution toward improved collections management and ultimately determine the project's final success.