

## Manage cultural heritage collections

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### Overview

This standard is about managing cultural heritage collections. It involves managing care requirements, overseeing collection management systems, recommending acquisitions, loans and disposals, and overseeing the movement of objects. Collections can refer to objects that are on display or in storage or to parts of a historic building or site which are in situ.

It includes ensuring cultural heritage is being cared for, reviewing documentation and information management systems, assessing the effects of, and establishing options and priorities for, acquisition, lending, borrowing and disposals on collections, managing the movement and transport of items and providing information and training to others about collection care and collection management requirements.

This standard is for those responsible for managing care requirements, overseeing collection management systems, and identifying acquisitions, loans and disposals to benefit collections.

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**Performance criteria***You must be able to:*

1. ensure that cultural heritage collections are being cared for in accordance with specified care procedures and schedules
2. work with appropriate people to resolve any particular risks or difficulties in achieving care requirements
3. review documentation and information management systems to ensure they maintain the level of information required for collection care and collection management
4. ensure all documentation and information is managed, stored and archived in accordance with organisation and legal standards
5. ensure that appropriate risk management procedures to manage and maintain data are in place and backups of primary copies are made on a regular basis and stored in appropriate locations
6. ensure indexing procedures and the structure of records meet requirements of users and comply with relevant standards
7. ensure that all categories of user can access documentation and information management systems at the level authorised
8. establish the options and priorities for acquisition, lending, borrowing and disposal in line with organisational policies and the resources available
9. make recommendations about acquisition, lending, borrowing and disposal that will benefit collections to appropriate people
10. assess the effects of new acquisitions, disposals, lending and borrowing on collections on an ongoing basis
11. ensure that cultural heritage is handled, packaged, moved and transported in line with handling procedures to meet loan or display requirements
12. provide relevant people with the rules, guidelines, procedures and training they need to achieve collection care and collection management requirements

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**Knowledge and understanding**

*You need to know and understand:*

1. the purpose, vision and objectives of the cultural heritage in your care, the criteria used to determine their strengths and weaknesses and the relationship between them and the collection as a whole
2. care procedures and care schedules, and how to identify and resolve the risks and difficulties associated with them
3. the categories and format of records and data required, including that relating to original records and data
4. relevant legal requirements relating to data protection, copyright and intellectual property and the organisation's policies for data storage, handling and security
5. organisational processes, formats, procedures and standards for the access, use and management of documentation and information management systems including how they interact with and work with other computerised or manual systems in the organisation
6. the effects of image size on system capacity and storage
7. necessary security measures, why they are important and the implications of a breakdown of security procedures
8. different categories of user, their requirements, restrictions to records and data and who should be given general or special access
9. how to evaluate the success and suitability of a documentation and information system and how to research new systems or developments to existing systems
10. how to train others in guidelines and procedures for the documentation and information systems
11. where to get specialist advice on technology and computerised systems
12. organisational policies relating to collection priorities, acquisitions, loans and disposal
13. how acquisitions and disposals contribute to the maintenance of collections and the options available for the expansion of collections
14. the previous and likely effects of acquisitions or disposals on the collection, the resources that are likely to be needed and the consequences of the different types of acquisition
15. sources of information on potential acquisitions, disposals and loans and who should be informed of potential opportunities
16. ethical considerations in relation to acquisitions and disposals including the types of acquisitions and disposals that could be seen as unethical and why
17. handling and packaging procedures and where to obtain information about required movement and transport requirements for objects

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