

Holistic Approaches to Collection Management: A Collective Research Project and CMS Tool Recommendation

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Developed collectively by students participating in the course
MUSM3125, Museums in a Digital World

A community based learning project in collaboration with the
Iowa Initiative for Sustainable Communities and the Edgewood Museum

Goals of this Report

Working in teams, University of Iowa students participating in the course *Museums in a Digital World* were charged with answering the question:

- *What collections management system would be best suited for the needs of the Edgewood Museum?*

This presentation synthesizes student recommendations while also outlining the following collection management issues:

- rationale for developing and following a collection management policy that aligns with the Edgewood Museum mission
- collection policy vs. collection management system
- standards, ethics, and approaches

Overview

Part 1: Defining Collections Management

- Collections = Core of the Museum
- Definition of Collections Management
- Care vs. Management
- Collection Management Systems (CMS)
- Examples of CMS Tools
- Standards and Ethics
- Tiered Collections

Part 2: CMS Recommendations

- Edgewood Museum Specific Needs
- Team CMS Comparisons
- Collective Recommendations
- Final Thoughts

PART 1:

Defining Collections Management

“It is not the specifics of the equipment that is important, but the process and procedures that are at the core of collections care.”

(Walhimer, *Museums 101*)

Collections = Core of the Museum

Important things to remember about collections:

- they should support the mission of the institution
- collections are technically owned by the public (public trust) and therefore need to be accessible by the public
- once acquired, objects in collections are to be cared for and preserved in perpetuity for current and future generations

What is collections management?

Collection management can be defined as:

"a process of information gathering, communication, coordination, policy formulation, evaluation, and planning" (Johnson, 2009).

Collection processes influence decisions about the collections management policy, which outlines protocols for scope, care, and emergency planning and response.

Collections care is primarily concerned with the physical preservation of artifacts whereas *collections management* focuses on the administrative responsibilities conducted by collection managers, registrars, and archivists.

Collection Management Systems

A collections management system (CMS) is software used by the staff of a collecting institution to organize, control, and manage by tracking all information related to and about those objects.

A CMS is used to record information such as object storage and exhibit location, provenance, interpretation, conservation reports, exhibition histories, and other information that can be used for a variety of purposes including education, marketing, membership, and administration.

CMS Technology is Nothing New

Museums have been using CMS since the 1960s, but early computer based inventories have evolved into something more complex.

Today, CMS tools are used for more than collection management tasks, many provide "access" to objects for researchers and the public and have become more complex with the addition of visual data (digital facsimile, photos, scans).

Specific Examples of CMS Tools

(not an all-inclusive list)

CMS designed for museums:

- TMS (The Museum System)
- PastPerfect Museum Software

Some museums choose to customize data management systems to fit their needs:

- FileMaker Pro
- Microsoft Access

New, web browser-based and cloud-based systems (free, open-source, web based systems):

- CollectionSpace
- CollectiveAccess

Standards and Ethics

Remember: A CMS is a tool *not a policy*.

A museum *must develop a collections management policy*, a core document in supporting a museum's mission and purpose. It is highly suggested that museum staff consult the American Alliance for Museums Collections Stewardship guidelines (see resources) as they construct a collections policy.

To go one step further, Simmons states:

“A policy is useless if it is outdated, ignored, too complex to be followed, too simplistic to be useful, or does not serve the museum’s mission. [...] Good policies help the museum achieve its mission and demonstrate its commitment to professional standards and best practices.”

Tiering Collections

It is highly recommended that the Edgewood Museum develop a tiered collections policy in order to ensure objects acquired align with the museum mission.

Tiers or ranks are assigned based on an object's connection to the mission, rarity, value and scarcity in this and other collections as outlined in the grid that follows. Each tier identifies guidelines for treatment, storage, documentation, handling, and use. All new acquisitions are ranked.

Tiering can be a time consuming process but the work done up front can assist in making numerous decisions down the road, for example, having a tiering process may limit the number of artifacts that the museum must de-accession (remove from the collection) at a later date.

Examples of Tier Levels

Tier 1: High-quality items intended for exhibit and/or research purposes and to be retained in perpetuity. They receive maximum levels of storage, conservation, and security.

Tier 2: Items that add significant research, educational, and/or exhibition value to the tier 1 collections. They are generally of good quality and demand supervised handling and careful management practices, but are not as strictly treated as tier 1 items.

Tier 3: Also known as exhibit props or education collections, tier 3 items are intended for hands-on use or for set dressing purposes in exhibits. Tier 3 includes both original artifacts and reproductions.

PART 2:

CMS Recommendations

Edgewood Museum

Students identified the needs/requirements of the Edgewood Museum as:

1. Low Cost: annual fees, support, licensing
2. Ease of Use: Will staff who are less “tech savvy” use comfortably?
3. Kinds of support/training available

Other considerations:

1. Customization- Pros: flexibility, Cons: amount of time it takes to set-up
2. Cloud-based option
3. Visitor access

CMS Tools Considered

Each team selected at least three CMS to evaluate. After much research, the CMS's with strikethroughs were eliminated based on their lack of alignment with Edgewood's needs (~~priced over \$4000~~, ~~not used with cultural institutions~~, ~~too complex (to use or customize)~~).

CMS reviewed by teams:

Team 1: ~~Eloquent Museum~~, ~~Resource Mate~~, ~~The Museum System~~, PastPerfect, Proficio (Re:Discover)

Team 2: Collective Access, Microsoft Access, PastPerfect

Team 3: ~~Eloquent Museums~~, Proficio, PastPerfect

Team 5: ~~Arctos~~, FileMaker Pro, PastPerfect

Team 6: ~~Electronic Museum~~, ~~Microsoft Excel~~, PastPerfect

Team 7: Adlib Museum Lite, ~~Eloquent Museum~~, PastPerfect,
~~The Museum System~~

Six tools were selected for comparison: Adlib Museum Lite, Collective Access, FileMaker Pro, Microsoft Access, PastPerfect, Proficio (Re:Discover)

Note: There is no Team 4 as participating students were reassigned to other teams.

PastPerfect Used Most Often Locally

Teams interviewed professionals as a part of their research:

- Alexandra Drehman, Executive Director of the Johnson County Historical Society (Interview with Team 3):
 - considers PastPerfect as the best option- it is integrated into their collections policy/process from start to finish.
- Tanisha Boyer from Mississippi River Museum and Aquarium:
 - likes how PastPerfect allows for multiple types of objects, and images can be added (with the MultiMedia Add-On)
 - easy for staff and volunteers to navigate
 - allows for interdepartmental use (would be beneficial if Edgewood Museum collaborates with the local Library)
- PastPerfect also used by State Historical Museum in Des Moines

Processing Objects using PastPerfect

Steps in the acquisition/ registration process utilizing PastPerfect:

1. Both the donor/collections manager sign the Deed of Gift
2. A registration form is completed (includes object and donor info, nomenclature from *Nomenclature 3.0 For Museum Cataloging*, item description, condition report, official location, accession number).
3. A photograph is taken
4. The object is assessed for preservation (condition report, preservation needs prioritized).
5. The object shelved/stored in permanent location.
6. All details are listed in CMS (PastPerfect)
7. Paper documents stored in document archives.”

Alexandra Drehman,
Executive Director of the Johnson County Historical Society,
Interview provided by team 3

What do the professionals use when they are not using PastPerfect?

Teams interviewed museum professionals at a variety of museums.

Cindy Opitz, UI Collections Manager for Pentacrest Museums

- Uses FileMaker Pro, it is easy and customizable, but this is only for collections management by staff. Cindy would prefer Arctos, used more for natural history museums.

Iowa Office of the State Archaeologist

- Uses Microsoft Access for its ease in management and ability to edit. One time cost makes it a value. Only allows for back-end access, does not allow for public access and searching.

Comparing the Features of CMS Tools

SYSTEM	COST	FEATURES
Adlib Museum Lite	Free	Designed for museums; drop-down lists for object catalogue; Free version has limited 5,000 record use; compatible with PC only; needs 1 GB space for 5,000 records; online support with free version
Collective Access	Open-source; basic hosting \$175 per month	Designed for museums; web-based, mobile friendly; plugins allow you to visualize your collection data as hierarchies, interactive maps, and timelines; online resources for support.
FileMaker Pro	\$350, 1-4 user license	General database system; allows for only backend access; needs customization; server set-up required; limited support.
Microsoft Access	\$109 for license	General database system; allows for only backend access; needs customization; server set-up required; limited support.

Comparing the Features of CMS Tools

SYSTEM	COST	FEATURES
PastPerfect	\$870 for the basic; 20% discount with AASLH and 30% with IMA membership	Cataloguing along with other functions including donations, memberships; Very detailed system. Many user defined fields available; efficient import and export. User manual available; online training, webinars, and support. Add-ons include: \$385 multimedia (images and video); \$40 Nomenclature 4.0; \$20 User's guide;
Proficio	\$1300 License + technical support one year OR \$1100 cloud based license and \$92 per month support and hosting fee	Designed for museums; several options available including cloud hosting; Internet interface makes collections available to researchers and the public via the internet or intranet. Website visitors can search, browse, and view collections data and images.

CMS Recommendations

First Choice: PastPerfect

- although there is a cost, the tool is rigorous and appropriate for the types of collections
- review and interviews support its user-friendly interface and multiple types of support (webinars, workshops, videos) provide extensive technical assistance
- add-ons provide the ability to “grow” into the system that would like to providing online collection access to the public

Second Choice: Proficio (Re:Discover)

- If Edgewood is looking to get away from a localized server, this might be an option
- With no recommendations or connections to museum professionals who could speak through experience about this tool it seems a bit of a risk compared with PastPerfect

CMS considerations

Alternate choices/thoughts:

- Microsoft Access: if budgets are tight, this could be a good place to start
- FileMaker Pro: cost versus the amount of time to customize makes this not the best fit
- Collective Access: open-code software is an interesting approach, but limited staff resources makes this tool heavy on customization on the front end
- Adlib Museum Lite: limits on size (5,000 files) could be a problem

Final Thoughts

PastPerfect as a CMS tool was reviewed by all teams and identified by 4 out of 6 teams as the first choice CMS based on its alignment with the needs of the Edgewood Museum including the following features:

- high customer reviews
- numerous options for support (workshops, webinars, forums)
- the ability to use the tool for multiple functions (collections, exhibits, membership)
- relatively low cost with discounts through professional organizations (20% AASLH, 30% IMA)
- positive feedback from professionals in the field

It is recommended that prior to beginning the registration process, the Edgewood Museum develop a tiered collection policy that prioritizes objects based on their alignment with the Museum mission and meets the standards of the AAM.

CMS resource links

Adlib Museum Lite, www.adlibsoft.com

- **Fact sheet** http://www.adlibsoft.com/Content/Images/Pdf/En_pdf/Fact%20Sheet%20Adlib%20Museum%20Lite%202010%20-%20UK.pdf

Collective Access, www.collectiveaccess.org

Microsoft Access, www.microsoftstore.com

PastPerfect, www.museumsoftware.com

Proficio (Re:Discovery Software), www.rediscoverysoftware.com

Other References and Resources

Collections Stewardship, AAM

<http://www.aam-us.org/resources/ethics-standards-and-best-practices/collections-stewardship>

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Johnson, Peggy. *Fundamentals of Collection Development and Management*. Chicago: American Library Association, 2009.

Jones, Trevor. *Go Ahead and Tier Your Collections*, Kentucky Historical Society, July 29, 2015. <http://www.activecollections.org/thought-pieces/2015/7/29/go-ahead-and-tier-your-collections>

Simmons, John E. *Things Great and Small: Collections Management Policies*. Washington, DC: American Association of Museums, 2006.

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