

**Policies, Plans and Procedural Documents**

*Policies* clearly establish the standards that regulate the museum's activities. They identify what needs to be done and provide a framework to help staff make decisions. Policy statements are approved by the governing authority.

*Procedures* tell staff how to do things and provide the mechanism and details for implementing the policy. Procedures are a series of succinct and unambiguous action steps that are developed at the staff level. They do not have to be approved by the governing authority.<sup>1</sup>

*Plans* are statements of overarching goals and directions of the institution within a given timeframe. Plans help maintain an institution so that it can perform its functions according to commonly accepted museum standards. Plans are approved by the governing authority.<sup>2</sup>

## Plans:

- Institutional Strategic Plan (also called a Long-Range Plan)
- Preservation Plan
- Collections Plan
- Exhibit Plan
- Business Plan (Financial Plan)
- Marketing Plan

## Institutional Policies:

- Collections Management Policy (also called a Collections Policy)
- Loan Policy
- Image Reproduction and Use Policy
- Facility Use Policy
- Key Policy (governs access to collections)
- Museum Pest Control Policy

## Procedure manuals:

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<sup>1</sup> Things Great and Small: Collection Management Policies, Simmons, John, AAM 2006

<sup>2</sup> The Manual of Museum Planning, 2<sup>nd</sup> edition, Lord, Gail Dexter, Lord, Barry, Alta Mira Press 1999

- Collections Processing (Accessioning, cataloging, photographing, numbering and storage of collections)
- Museum Daily Procedures (opening and closing)
- Museum Seasonal Procedures (closing in the fall and opening in the spring)
- Store Procedures (opening and checking out the till each day)
- Bookkeeping
- Exhibit Maintenance (cleaning, refreshing labels etc)
- Housekeeping
- Emergency Response
- Integrated Pest Management

Other important documents:

- Mission statement specific to the museum
- Code of Ethics
- Position Descriptions

Check lists:

- Facility Maintenance
- Housekeeping
- Facility Use

*Mission Statement*

A museum mission statement is important for defining the objectives of the museum and the scope of collections. It helps focus the museum on what it does best. According to The Manual of Museum Planning a mission statement should be “succinct, preferably memorable, and it is hoped, inspiring.” A well written, succinct mission statement also helps funding agencies to better understand how the request fits within the overall goals and operations of the museum. If a mission statement is too general, funding agencies have a difficult time ascertaining if the request is in line with the objectives of the institution.