Collections Significance Assessment Toolkit for Welsh Museums

Llywodraeth Cymru
Welsh Government

An Introduction to Collections Significance Assessments

Why do it?

There are many reasons you might think that you need to conduct a Collections Significance Assessment.

You may want to:

- Better understand the value of your collections to the local community, region or nation
- Inform the rationalisation of your collection
- Create a strategic acquisitions process
- Write / update your Collections Development Policy and other collections management policies and procedures
- Support an application to a grant funder

The 5 Whys

Before embarking on a significance assessment project, it is important that you are clear about the reasons you've chosen to do so. If you would like to apply a further test to confirm your choice then one of the decision-making techniques you could try is the '5 Whys' developed by Sakichi Toyoda, a Japanese inventor and industrialist.
You can find more information about Toyoda's approach online.

The Method

This toolkit sets out a method for dealing with significance assessments in your museum. It uses a series of key stages that build one upon the other to ensure a logical methodology aimed at achieving a successful outcome, no matter how large or small the collection.

Stage 1 – Planning your approach: understanding the project's context and expected outcomes
Stage 2 – Collections Review: making sure your systems and data will help you to conduct a significance assessment
Stage 3 – The Significance Assessment: Action Plans catering for your main significance assessment purpose
Stage 4 – Review: assessing whether your main significance assessment aims have been achieved

By fully understanding the main reasons for the assessment, you will be able to tailor your approach to maximise the quality of the results. Stage 1 planning is essential and may involve consideration of several options, perhaps through discussion with colleagues or by obtaining external advice on the way forward. Stage 1 is the foundation of Stages 2 – 4, which, themselves must be completed in order. Developing a full understanding of the purpose of each of these stages will be part of your planning process at Stage 1.

Information from each stage feeds into the next stage in the process, so avoid cutting corners by missing out a stage!

Why are they so important?

Significance assessments are an important part of our work in the museum and heritage sector. They can be used to support collections management, develop community involvement, secure funding, and justify the time and resources spent on preserving objects in your museum. This toolkit has been designed to help you through the process using a step-by-step approach, which will ensure you cover the key elements in the correct order. It has also been designed in such a way that you can tailor the tools offered to meet the needs of your organisation and those who will be working on the assessment.

Is this just another demand on the time of hard-pressed museum staff?

It may feel like this is just another task to add to your ever-growing list of 'things to do', but assessing the significance of your collections is a valuable tool that can have a positive impact on various aspects of a museum's output. Better understanding the significance of your collections can help you to more effectively interpret those objects and the stories they hold, feed into your formal learning programme, contribute towards audience development, forge new and strengthened community connections, and make your collections more inclusive, to name just a few potential benefits.

Most museums struggle with a lack of storage and incomplete documentation. This toolkit has been designed to provide a basic approach that will help to reduce such problems in the future and to ensure a fuller understanding of the collections in your care. Getting to grips with collections significance assessments will help you to make this type of work part of your everyday documentation procedures. It should become an ongoing practice that aids your understanding of the objects already held, and informs decisions about what to accept into the collection and what needs to be rationalised.

I don't have the time!

Justifying the significance of your collections should be a day-to-day activity and part of your collections management processes. The tools provided in this toolkit will enable you to work smarter and reduce future work. You may need significance statements to justify your activities to governing bodies or the public, or to apply for grant funding. By incorporating significance assessment into your everyday practice, much of the hard work will have been done already and you will be able to use the information gathered during previous significance work to write those statements.

It will cost a lot and there is just me here; I don't have a collections team!

This toolkit has been designed to enable you to set the scope of your project, however big or small, according to your organisation's needs and capacity, and the goals you've set for your particular assessment. It has also been designed with a wide range of organisations in mind so that its processes will work for those with fewer resources and those with greater capacity. The guidance will provide you with the tools to make significance assessment part of your entry level procedures – the tasks you complete when an object is acquired for the collection. This will reduce the impact on your resources in the future by avoiding the collection of objects with little or no relevance, which will require rationalisation in the future.

Getting started

Planning Your Approach

Within this Stage you will:

Explore the context of your project
How does this fit within the mission and vision of your museum. Does it enhance your purpose or contribute to supporting your communities and the diversity of your collections?

Decide what to assess
Are you going to tackle the whole collection or choose one area to assess? What are the resources you have available? Why do you need to assess this particular collection?

Consider what you need before starting
Consider other practical aspects of the project that you may need to address before starting your Collections Significance Assessment

Understand the Tools for choosing which collection to assess
Look at the various worksheets, matrices and prompt sheets provided in this Toolkit, read through other published works on the subject, or design your own tools within the context of each stage.

Let's think about the context

Planning your approach is essential if you are to achieve the desired outcome and produce the outputs that are needed. Significance assessments can be complex and involve the marshalling of data from a variety of sources. It is important, therefore, that you fully understand and cater for the various steps involved. The correct application of Stage 1 is the key to success.

Before you begin the assessment, it's important to understand the context of your project and organisation. What is the backdrop against which you will be working? How does your proposed assessment project fit into the organisation's strategic vision and what it is trying to achieve? Will there be any barriers to you conducting and completing a successful assessment?

- What's the organisation's purpose, mission and vision? Are these still relevant? Do they need updating?

- How much do you know / understand about past decisions regarding the collection and its use? Why were certain objects collected? How have they been used? What was their intended use? Your history files, object records (database and hardcopy), and records held about past projects and exhibitions should help you to answer these questions.

- Do your collections relate to particular communities? If so, who are they? Are any of those communities currently underrepresented?

Deciding what to assess

Once you've decided that you want to embark upon a Collections Significance Assessment, and you understand the context of your project, it's time to decide which part of the collection you'd like to focus on. Are you going to tackle the whole collection or choose one area to assess? For example, you may choose to assess a discrete collection of objects, such as your costume collection, to find out whether the pieces you hold have particular significance for the local area with strong provenance attached. You may even wish to be more specific, and choose a particular part of your costume collection, such as pieces relating to childhood.

It's completely up to you how much of the collection you'd like to assess. Be mindful of available resources – staff, time and budget – and what can realistically be achieved. You might find that focusing on one part of the collection at a time is more manageable, and that's fine. Tailor the assessment process to suit the needs of your organisation.

What do I need to consider before I start?

Before you get started on the assessment process, there may be collections documentation, storage and environmental issues that you need to address. These could include: whether your documentation will provide enough information to conduct an assessment; the safety of spaces within which staff and volunteers will be working; the need for Personal Protective Equipment and the particular handling / conservation needs of the objects to be assessed. It would be useful to work through the following questions:

- What are the main collections management issues facing your collection? For example, a documentation backlog, incomplete object records, a lack of provenance information, the need to rationalise your collections.

- Are there any storage and / or environmental issues that need to be addressed? For example, is the store where the collection is held overcrowded or difficult to access? I s the space safe for the collections and staff / volunteers? Are there any conservation issues that need to be considered?

- Do you have a suitable workspace available to conduct the assessment? Will staff / volunteers be able to work in the store or bring objects out of storage for assessment?

- What are the practicalities involved in conducting the assessment? For example, will staff and volunteers need to work at an offsite store or different venue? Do you have the means of transporting people there? Will anyone be required to work alone? What safe working procedures do you need to put in place?

Tools for choosing which collection to assess

When considering which collection to assess, you may find you have a list of several candidates. To inform your decision about which collection or part of the collection to focus on, and to help you answer some of the practical considerations listed above, it is recommended that you review and score each of the candidate collections against a range of criteria (relevance, documentation, location check, correct storage, environment, resource implications, handling issues, workspace needs and outside support). We've developed some tools to help you with this process: a **Sample Object Worksheet** and **Candidate Collection Worksheet**. We suggest you choose a sample of up to 12 randomly chosen objects from each candidate collection to test your collections management systems and identify any potential documentation, environmental or resource issues. The **Sample Object Worksheet** will allow you to record how each of those sample objects scores against each criterion, giving you an overall score for that collection, which can then be noted on the **Candidate Collection Worksheet**. Excel versions of both worksheets can be found on the Welsh Government and Collections Trust websites. Word versions can be found later in the Toolkit. You'll then be able see how each candidate collection has scored against one another and make a decision about which you should progress to Stage 2 (Collections Review).

Sample Object Worksheet

Randomly choose up to 12 sample objects from each candidate collection and score them against each criterion on the worksheet. Create one sheet per candidate collection.
This will give you an average score at the bottom for each criterion.

	A	B	C	D	E	F	G	H	I	J	K
1	**Sample Object Worksheet**										
2	Use this worksheet to assess up to 12 objects from each candidate collection and note the average scores for each collection on the Candidate Collection Worsheeet										
3	**Collection Name**	Old Hall Kitchen									
4	**Object**	**Relevance**	**Documentation**	**Location Check**	**Correct Storage**	**Environment**	**Resource Implications**	**Handling Issues**	**Workspace needs**	**Outside Support**	
5		none=1	none =1	failed=1	poor=1	poor=1	high=1	difficult=1	substantial=1	expert assessment=1	
6		historic=2	inventory=2	passed=3	accessible=2	adequate=2	medium=2	manageable=2	manageable=2	peer review=2	
7		current=3	full=3		good=3	good=3	low=3	easy=3	few=3	internal assessment=3	
8											
9	1960.334 Jelly mould	2	2	3	2	2	1	1	3	3	
10	1971.109 Rolling pin	2	2	3	2	2	1	1	3	3	
11	1978.211 Pastry cutter	2	2	3	2	2	1	1	3	3	
12	1982.037 Pudding bowl	2	2	3	2	2	1	1	3	3	
13	2000.003 Mincer	2	3	3	2	2	1	1	3	3	
14	1987.119 Sausage maker	2	2	3	2	2	1	1	3	3	
15	1965.010 Bread tin	2	2	3	2	2	1	1	3	3	
16	2007.056 Piping nozzle	2	3	3	2	2	1	1	3	3	
17	1964.073.001 Cup	2	2	3	3	3	1	1	3	3	
18	1985.004 Teapot	2	2	3	3	3	1	1	3	3	
19											
20											
21											
22	**Number of items above**	10									TOTAL
23	**Average Collection Score (transfer to Planning Check Scored Matrix)**	2	2	3	2	2	1	1	3	3	20
24											
25	**Notes**										
26	Relevance	Is this object relevant to the current acquisition policy of the museum; a previous policy; or is it of no known relevance									
27	Documentation	Check the quality of documentation for this item									
28	Location Check	Test location control to make sure you can find this objecty through your documentation system									
29	Correct Storage	Assess the quality of storage for accessibility									
30	Environment	Is the object difficult to work on; is it held in poor conditions; would specific PPE be required?									
31	Resource Implications	Would a review of this type of object require large numbers of people; or specific funding issues?									
32	Handling Issues	Is the item bulky or heavy; does it need special handling techniques?									
33	Workspace Needs	Do you need to work on the object in a specific environment; how much space is requried to assess the item?									
34	Outside Support	Can you undertake a qualitative review within the organisation or do you require outside support?									

Old Hall Kitchen | Chapel | Welsh Costume | Herbarium | +

Old Hall Kitchen

Sample Object Worksheet

Use this worksheet to assess up to 12 objects from each candidate collection and note the average scores for each collection on the Candidate Collection Worksheet

Collection Name	Bethel Chapel									
Object	Relevance	Documentation	Location Check	Correct Storage	Environment	Resource Implications	Handling Issues	Workspace needs	Outside Support	
	none=1	none =1	failed=1	poor=1	poor=1	high=1	difficult=1	substantial=1	expert assessment=1	
	historic=2	inventory=2	passed=3	accessible=2	adequate=2	medium=2	manageable=2	manageable=2	peer review=2	
	current=3	full=3		good=3	good=3	low=3	easy=3	few=3	internal assessment=3	
1934.021 Prayer book	2	2	1	1	1	3	3	3	3	
1989.002 Pew	2	2	3	1	2	1	1	1	1	
1989.088 Hymn book	2	2	3	2	2	3	3	3	3	
1989.045 Kneeler	2	2	3	2	2	3	3	3	1	
1989.033 Banner	3	2	3	2	2	1	2	2	1	
1989.034 Banner	3	2	3	2	2	1	2	2	1	
1967.026 Prayer book	2	2	3	2	2	3	3	3	3	
1989.001 Foundation stone	2	2	3	2	2	2	2	2	1	
1989.015 Commerative trowel	2	2	3	2	2	3	3	3	1	
1934.022 Sunday school medal	3	2	1	1	1	3	3	3	3	
Number of items above	10									**TOTAL**
Average Collection Score (transfer to Planning Check Scored Matrix)	2	2	3	2	2	2	3	3	2	20

Notes

Relevance	Is this object relevant to the current acquisition policy of the museum; a previous policy; or is it of no known relevance
Documentation	Check the quality of documentation for this item
Location Check	Test location control to make sure you can find this objecty through your documentation system
Correct Storage	Assess the quality of storage for accessibility
Environment	Is the object difficult to work on; is it held in poor conditions; would specific PPE be required?
Resource Implications	Would a review of this type of object require large numbers of people; or specific funding issues?
Handling Issues	Is the item bulky or heavy; does it need special handling techniques?
Workspace Needs	Do you need to work on the object in a specific environment; how much space is requried to assess the item?
Outside Support	Can you undertake a qualitative review within the organisation or do you require outside support?

Old Hall Kitchen | Chapel | Welsh Costume | Herbarium | +

Chapel

Sample Object Worksheet

Use this worksheet to assess up to 12 objects from each candidate collection and note the average scores for each collection on the Candidate Collection Worksheet

Collection Name	Welsh Costume									
Object	**Relevance**	**Documentation**	**Location Check**	**Correct Storage**	**Environment**	**Resource Implications**	**Handling Issues**	**Workspace needs**	**Outside Support**	
	none=1	none =1	failed=1	poor=1	poor=1	high=1	difficult=1	substantial=1	expert assessment=1	
	historic=2	inventory=2	passed=3	accessible=2	adequate=2	medium=2	manageable=2	manageable=2	peer review=2	
	current=3	full=3		good=3	good=3	low=3	easy=3	few=3	internal assessment=3	
1946.112 Dress	3	3	3	2	3	3	2	3	2	
1994.017 Welsh hat	3	3	3	3	3	3	3	3	2	
1948.005 Pocket apron	3	3	3	3	3	3	3	3	2	
1936.045 Bedgown	3	3	3	2	3	3	3	3	2	
1936.032 Stockings	3	3	3	3	3	3	3	3	2	
1948.015 Shawl	3	3	3	3	3	3	3	2	2	
2005.112 Cap	3	3	3	3	3	3	3	3	2	
1994.025 Underskirt	3	3	3	3	3	3	3	2	2	
1997.023 Mantle	3	3	3	3	3	3	3	3	2	
1998.100 Handkerchief	3	3	3	3	3	3	3	3	2	
Number of items above	10									**TOTAL**
Average Collection Score (transfer to Planning Check Scored Matrix)	3	3	3	3	3	3	3	3	2	26

Notes

Relevance	Is this object relevant to the current acquisition policy of the museum; a previous policy; or is it of no known relevance
Documentation	Check the quality of documentation for this item
Location Check	Test location control to make sure you can find this objecty through your documentation system
Correct Storage	Assess the quality of storage for accessibility
Environment	Is the object difficult to work on; is it held in poor conditions; would specific PPE be required?
Resource Implications	Would a review of this type of object require large numbers of people; or specific funding issues?
Handling Issues	Is the item bulky or heavy; does it need special handling techniques?
Workspace Needs	Do you need to work on the object in a specific environment; how much space is requried to assess the item?
Outside Support	Can you undertake a qualitative review within the organisation or do you require outside support?

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Welsh Costume

Sample Object Worksheet

Use this worksheet to assess up to 12 objects from each candidate collection and note the average scores for each collection on the Candidate Collection Worksheet

Collection Name	Mrs Pritchard's Herbarium									
Object	Relevance	Documentation	Location Check	Correct Storage	Environment	Resource Implications	Handling Issues	Workspace needs	Outside Support	
	none=1	none =1	failed=1	poor=1	poor=1	high=1	difficult=1	substantial=1	expert assessment=1	
	historic=2	inventory=2	passed=3	accessible=2	adequate=2	medium=2	manageable=2	manageable=2	peer review=2	
	current=3	full=3		good=3	good=3	low=3	easy=3	few=3	internal assessment=3	
1947.033	3	3	3	3	3	2	1	2	1	
1947.067	3	3	3	3	3	2	1	2	1	
1947.089	3	3	3	3	3	2	1	2	1	
1947.012	3	3	3	3	3	2	1	2	1	
1947.065	3	3	3	3	3	2	1	2	1	
1947.124	3	3	3	3	3	2	1	2	1	
1947.009	3	3	3	3	3	2	1	2	1	
1947.024	3	3	3	3	3	2	1	2	1	
1947.112	3	3	3	3	3	2	1	2	1	
1947.077	3	3	3	3	3	2	1	2	1	
TOTAL (for each column)	10									TOTAL
Average Collection Score (transfer to Candidate Collection Worksheet)	3	3	3	3	3	2	1	2	1	21
Notes										
Relevance	Is this object relevant to the current acquisition policy of the museum; a previous policy; or is it of no known relevance									
Documentation	Check the quality of documentation for this item									
Location Check	Test location control to make sure you can find this objecty through your documentation system									
Correct Storage	Assess the quality of storage for accessibility									
Environment	Is the object difficult to work on; is it held in poor conditions; would specific PPE be required?									
Resource Implications	Would a review of this type of object require large numbers of people; or specific funding issues?									
Handling Issues	Is the item bulky or heavy; does it need special handling techniques?									
Workspace Needs	Do you need to work on the object in a specific environment; how much space is requried to assess the item?									
Outside Support	Can you undertake a qualitative review within the organisation or do you require outside support?									

Chapel | Welsh Costume | Herbarium | +

Herbarium

Candidate Collection Worksheet

Now transfer the average scores from each candidate collection in the Sample Object Worksheet into the Candidate Collection Worksheet. This will give you an overall average score for each candidate collection. The collection that scores the highest is the strongest candidate collection to go forward for assessment.

	A	B	C	D	E	F	G	H	I	J	K	L
1	**Candidate Collection Worksheet**										**4**	
2	(In the example, the primary candidate collection for consideration would be the Welsh Costume)											
3	Collection Name	Relevance	Documentation	Location Check	Correct Storage	Environment	Resource Implications	Handling Issues	Workspace needs	Outside Support	SCORE	
4		none=1	none =1	failed=1	poor=1	poor=1	high=1	difficult=1	substantial=1	expert assessment=1		
5		historic=2	inventory=2	passed=3	accessible=2	adequate=2	medium=2	manageable=2	manageable=2	peer review=2		
6		current=3	full=3		good=3	good=3	low=3	easy=3	few=3	internal assessment=3		
7												
8	Old Hall Kitchen	2	2	3	2	2	1	1	3	3	19	
9	Bethel Chapel	2	2	3	2	2	2	3	3	2	21	
10	Welsh Costume	3	3	3	3	3	3	3	3	2	26	
11	Herbarium	3	3	3	3	3	2	1	2	1	21	
12											0	
13											0	
14											0	
15											0	
16											0	
17											0	
18											0	
19											0	
20											0	
21											0	
22											0	
23											0	
24											0	
25												
26	Notes											
27	Relevance	This is relevance to the current acquisition policy of the museum; a previous policy; or no known relevance										
28	Documentation	Check a representative sample to assess quality of documentation										
29	Location Check	Test location control to make sure you can find objects in the collection										
30	Correct Storage	Assess the quality of storage for accessibility										
31	Environment	Is the collection difficult to work on; is it held in poor conditions; would specific PPE be required?										
32	Resource Implications	Would a review require large numbers of people; or specific funding issues?										
33	Handling Issues	Are the items bulky or heavy; do they need special hadnling techniques?										
34	Workspace Needs	Do you need to work on items in specific environments; how much space is requried to assess items in the collection?										
35	Outside Support	Can you undertake a qualitative review within the organisation or do you require outside support?										
36												
37												

The **Sample Object Worksheet** and **Candidate Collection Worksheet** should be used together, with the former feeding into the latter. They are both presented in the form of a scored checklist (Excel file) but you may prefer to adopt a more qualitative approach. Scoring can be helpful but can also be divisive if too much reliance is placed on arbitrary measures. Use and adapt the scoring wisely to achieve your aims and choose what works for you. You can find blank copies of both tools below to calculate the averages yourself and/or adopt a more qualitative approach, and Excel versions here, which will calculate the averages for you.

You may wonder why you need to do this – you already have an idea of which collection you'd like to assess! However, working through this process may reveal that another collection is a better candidate for assessment based on for example, quality of documentation, storage accessibility, and outside support available (specialist input). Issues will be identified with the other candidate collections, which you can then address before they can go forward for assessment as part of a future project.

Collections that receive the highest score will be the strongest candidates to go forward to Stage 2 and ultimately, for significance assessment. If a collection you had hoped to assess does not score highly, it may be necessary for you to address the issues and barriers preventing you from assessing that collection before you can proceed with a significance assessment for those objects.

Once you've completed Stage 1, you should be able to answer the following three critical questions:

- Which collection will you be taking forward to Stage 2?

- Why do you need to understand the significance of the collection or part of the collection?

- What resources will be needed to tackle significance assessment processes?

Case study

Tenby Museum and Art Gallery

In this well-loved independent museum, the strengths of the collection lie mainly in the national importance of elements of the art collection and the community significance of a range of other collections. A review took place in 2021 prompted by the need to carry out some rationalisation of the collection to ease storage issues. The museum accepted that deaccessioning was not necessarily the only solution and alternatives might be possible, including the reorganisation and prioritisation of collection storage. In planning an approach, some social history collections appeared to be of less relevance to the current mission of the museum, but this perception was partly influenced by the range and sheer quantity of material present.

The museum agreed that the artistic and/or historic value of these candidate collections had to be clarified by reference to all associated information to provide accurate data upon which rationalisation decisions could be taken. Thus, work at Stage 1 identified the need for a collections and documentation review and a thorough examination of associated information. The museum is steadily working through the Stage 2 process using a system that best fits the nature of the social history collection. A Stage 2 process can take time, but only through a clear understanding of the facts supporting an object can valid decisions on rationalisation be taken.

Sample Object Worksheet

Use this sheet to calculate the average score for each collection ready to transfer to the Candidate Collection Worksheet

LIST OF RANDOMLY CHOSEN OBJECTS FROM THE FOLLOWING NAMED COLLECTION	Relevance	Documentation	Location Check	Correct Storage	Environment	Resource Implications	Handling Issues	Workspace Needs	Outside Support
.... Name of Collection	none=1 historic=2 current=3	none =1 inventory=2 full=3	failed=1 passed=3	poor=1 accessible=2 good=3	poor=1 adequate=2 good=3	high=1 medium=2 low=3	difficult=1 manageable=2 easy=3	substantial=1 manageable=2 few=3	expert assessment=1 peer review=2 internal assessment=3
TOTAL (for each column)									
AVERAGE (divide total by no. of items and round down to whole number) THEN transfer average results from this collection to the CANDIDATE COLLECTION WORKSHEET									

Notes

Relevance	Is this object relevant to the current acquisition policy of the museum; a previous policy; or is it of no known relevance
Documentation	Check the quality of documentation for this item
Location Check	Test location control to make sure you can find this object through your documentation system
Correct Storage	Assess the quality of storage for accessibility
Environment	Is the object difficult to work on; is it held in poor conditions; would specific PPE be required?
Resource Implications	Would a review of this type of object require large numbers of people; or specific funding issues?
Handling Issues	Is the item bulky or heavy; does it need special handling techniques?
Workspace Needs	Do you need to work on the object in a specific environment; how much space is required to assess the item?
Outside Support	Can you undertake a qualitative review within the organisation or do you require outside support?

If you are assessing a single item rather than a collection then simply note the result directly on the Candidate Collection Worksheet.

Candidate Collection Worksheet

Use this to conduct a basic check to see which collections or objects might be primary candidates for Collections Reviews and Significance Assessments

List the candidate collections or objects here and assign relevant average scores from the Sample Object Worksheet for each collection or score directly if dealing with one item.	Relevance none=1 historic=2 current=3	Documentation none =1 inventory=2 full=3	Location Check failed=1 passed=3	Correct Storage poor=1 accessible=2 good=3	Environment poor=1 adequate=2 good=3	Resource Implications high=1 medium=2 low=3	Handling Issues difficult=1 manageable=2 easy=3	Workspace needs substantial=1 manageable=2 few=3	Outside Support expert assessment=1 peer review=2 internal assessment=3	TOTAL SCORE For each collection/ object

Notes

Relevance	This is relevance to the current acquisition policy of the museum; a previous policy; or is it of no known relevance
Documentation	Check a representative sample to assess the quality of documentation
Location Check	Test location control to make sure you can find objects in the collection
Correct Storage	Assess the quality of storage for accessibility
Environment	Is the collection difficult to work on; is it held in poor conditions; would specific PPE be required?
Resource Implications	Would a review of this collection require large numbers of people; or specific funding issues?
Handling Issues	Are the items bulky or heavy; does it need special handling techniques?
Workspace Needs	Do you need to work in a specific environment; how much space is required to assess items in the collection?
Outside Support	Can you undertake a qualitative review within the organisation or do you require outside support?

Part of the purpose of this stage is to ensure that you are fully aware of any obstacles that might exist in creating a Statement of Significance or other output. Those with the highest scores may prove to be the easiest to work on first.
If you are assessing a single item rather than a collection then simply note the result directly on the Candidate Collection Worksheet.

Collections Review

Making sure your systems and data will help you

Within this Stage you will:

Prepare your collections

Will your collections management systems allow you to proceed with
a significance assessment?
Do you hold enough collections information to provide the detail needed?

Conduct a Collections Review

Identify any issues with your documentation systems. Are there any barriers that will stop you from completing a significance assessment?

Identify and rectify any particular collections management problems

You need to ensure that you have full and accurate collections information

Getting your collections ready

Before getting to grips with the Significance Assessment, you will need to consider the status of the chosen collection and to find out whether your collections management systems will provide the right detail to support your assessments. Collections Review is a Spectrum standard with museums requiring a policy to explain how collections reviews are carried out. This may be included as part of your Collections Development Policy. The Spectrum standard refers to the need to plan appropriately for a Collections Review and to be clear about the purpose of such a review. This is one of the reasons it is so important that Stage 1 is carried out thoroughly and effectively.

In this instance, the primary purpose of the review is the need to establish the foundation for a significance assessment. It is important at this stage to identify any shortcomings in the organisation's documentation system, gaps in essential information, and limiting factors when dealing with future significance assessments. The Collections Review will do this, if applied correctly.

There are several published works related to Collections Review and several examples of helpful matrices that can be used or adapted to your needs and purpose. The initial stage of Caroline Reed's *Reviewing Significance* (Reviewing Significance 3.0) is a good example of a comprehensive method of carrying out a collections review and this incorporates many of the elements required prior to developing a significance assessment. You could also consider the method adopted in the UCL collections review process (UCL Collections Review Toolkit). Bear in mind that this guidance is sometimes tailored to fit circumstances and you may need to adapt the recommended method to suit your own museum or collection.

Basic Collections Review Matrix

The basic **Collections Review Matrix** set out below could be used as a foundation for your work. This matrix has been developed to support reviews in smaller museums and may not provide the detail necessary for larger collections or more involved processes. Nevertheless, with these considerations in mind, the checklist could be employed as a useful method for gathering the required data to allow you to proceed to the Significance Assessment in Stage 3.

Note that this **Collections Review Matrix** is presented in the form of a scored checklist (Excel file) but you may prefer to adopt a more qualitative approach. You can find an Excel version of the **Collections Review Matrix** on the Welsh Government and Collections Trust websites, together with a blank Word version below, which can be used for scoring or for qualitative analysis. Scoring can be helpful but can also be divisive if too much reliance is placed on arbitrary measures. Use and adapt the scoring wisely to achieve your aims.

Please note, that while a cursory assessment of significance is asked for in the Collections Review Matrix, you should avoid making final decisions on the value of an object until after completing the appropriate Action Plan (see Stage 3 for further details on each of the Significance Assessment Action Plans).

On completion of the **Collections Review Matrix**, if documentation, storage or other problems are identified you might like to consider the following:

- What is the cause of the issue, and can it be rectified?
  For example, are your collections management problems the result of you needing to rationalise your collections or would a reorganisation of the store and updating of object records help?

- Make sure you understand what can be achieved with your current documentation.
  Will your records limit what you can achieve? Will you be able to access the necessary information to undertake a significance assessment?

- If any of the storage spaces are unsafe or difficult to access, can those barriers be overcome relatively easily? For example, can a space be cleared to provide safe access?
  Would a deep clean of the store make the space a safe and comfortable working environment?
  If there are structural or mould issues, you will most likely require greater resources to address the problem.

Avoid rushing through this stage – it is critical!

Do not proceed to Stage 3 until you are confident that your collection and collections data are in a state that will help the Significance Assessment process rather than hinder it.
Trying to rectify problems at Stage 3 not dealt with at Stage 2 will result in more effort and potentially a waste of resources as you are forced to return to the
Collections Review stage (Stage 2) to resolve the problem(s).

If necessary, revisit and revise your planning at Stage 1 and identify a more realistic set of outcomes based on the availability of sound collections data. If you do this, return to Stage 2, and then progress to Stage 3.

Once you've completed Stage 2, you should be able to answer the following questions:

- Are there any collections documentation, access or resource issues that may prevent you from conducting an assessment?
- Can any issues identified be resolved so you can progress to Stage 3?

Collections Review Matrix

Please choose at random up to 15 items in your chosen collection to make sure that there is accurate and sufficient data available to proceed to a Significance Assessment at Stage 3

Identity (Accession number or simple name)	Object Name Recorded not present=1 present=3	Accession No. not present=1 present=3	Entry/Title Form not present=1 present=3	Mark/Label No =1 One=2 Both=3	Acc Files None=1 Basic=2 Good=3	Database Not present=1 Inventory=2 Good=3	Location Check None=1 Correct=3	Correct Storage Poor=1 Adequate=2 Good=3	Environment Poor=1 Adequate=2 Good=3	Use No previous=1 Occasional=2 Frequent=3	Relevance None=1 Doubtful=2 Good=3	Perceived Significance None=1 Possible=2 Definite=3	SCORE For each identity *See Note 1*
TOTAL For each category												**SAMPLE TOTAL SCORE**	
MEAN CATEGORY SCORE (Total/No. Items)												**SAMPLE AVERAGE SCORE** *See Note 2*	

An individual Mean Category Score below 1.5 probably indicates that the category concerned requires attention

A Sample Average Score for this collection below 14 may indicate that the collection requires further attention before being considered as a candidate collection

Note 1: Add all the category scores (in each row) excluding the 'Perceived Relevance' score.
Note 2: Divide the Sample Total Score (the column total) by the number of identities listed.

Notes

Object Name Recorded	Is the item correctly identified and is the correct name available?
Accession Number	Is there a unique identifiable accession number associated with the object?
Entry or Title Form	Score 3 if they include donor details and transfer signature to prove ownership, otherwise score 1.
Mark / Label	Score 2 if either label or mark is present and score 3 if both are present.
Accession Files	If you just have the Accessions Register and Entry Form then score 2; if correspondence/ history files confirming ownership are present then score 3.
Database	This could be your documentation software system or card index, ideally providing accurate associated information.
Location Check	Can you trace an item from documentation to storage location, and vice versa?
Correct Storage	This could refer to correct display method if item is on display, otherwise the state of the current storage conditions.
Environment	Check RH and Light/ UV Levels in particular, though other agents of deterioration such as insect pests may be of concern.
Use	Use could include display or relevance to research or education work.
Relevance	This is the relevance of the item to your current Acquisition Policy/ Strategy.
Perceived Significance	Arbitrary assessment only (not included in final scores but could be used later to check your 'best guess' understanding of each object against the result of the final significance assessment).

The Collections Review Matrix provides a Stage 2 test as to the completeness of some basic collections data for your chosen collection. You may wish to create you own matrix or amend certain elements that better fit your chosen collection. The purpose of this exercise is to try to identify gaps in some essential data that would otherwise hamper your efforts to assess significance at Stage 3. Note that 'Perceived Significance' is not an essential element at Stage 2 – the true significance will be assessed at Stage 3.

Significance Assessment Action Plans

Within this Stage you will:

Develop your Significance Assessments for the chosen collection(s)

Use the work done and information gathered at Stages 1 and 2 to prioritise the key significance assessment needs – this will help you to choose the appropriate Significance Assessment Action Plan.

- Defining Status Action Plan
- Rationalisation Action Plan
- Acquisition Significance Action Plan
- Exhibition Significance Action Plan
- Or an Action Plan of your own design.

Be sure of your Outputs and Outcomes

List the outputs and outcomes of your Action Plan to check these match with what you're hoping to achieve on completion of the Significance Assessment.

Choosing the appropriate Significance Assessment Action Plan

You've worked through Stage 1 to understand the context of your project, the aims of the assessment, which collection you want to focus on by working through the Sample Object Worksheet and the Candidate Collection Worksheet and what you need to do to prepare for the Collections Review. You have completed a Collections Review at Stage 2 to test your collections management systems and now have confidence that the collections information is in a sufficient state to allow you to progress to Stage 3 - the Significance Assessment. Now it's time to select the **Significance Assessment Action Plan** you're going to use to assess your chosen collection and get started.

Use the work done and information gathered at Stages 1 and 2 to prioritise the key significance assessment needs. If you have worked methodically through Stages 1 and 2 you will have a very clear understanding of these needs and will be able to proceed to one or more of the Action Plans set out here in Stage 3.

Each museum will have its own priorities and requirements and no guidance document can cater for every one of these. There may be nuances within your project aims that do not readily fit into the model Action Plans suggested here. These example Action Plans have been developed to try to fit the most common scenarios. As with other elements of this guidance, feel free to adapt and develop your own Action Plans to fit the particular needs of your organisation and use the principles and examples set out below to guide your work.

With this in mind, Stage 3 sets out four potential Action Plans you could use or adapt to conduct your chosen Significance Assessment. Choose the Action Plan that best meets the needs of your organisation. Each Action Plan has been designed to help you undertake assessments with particular goals in mind. The table below shows what each of the Action Plans will help you to do.

Type of Action Plan	What the Action Plan will help you to do
Defining Status Action Plan	This will enable you to identify significant collections or objects within your collection that are iconic or have particular significance and value for your local communities, nationally, or internationally. It will define which collections best represent your organisation's purpose, vision and mission. Identifying the status of your collection, or key parts of the collection, will allow you to articulate the value to society of your work. It will also help you to confirm to outside organisations that your collections match your aims and community responsibilities, no matter how that community is defined.
Rationalisation Action Plan	A sound approach to collections management may sometimes require you to identify objects or groups of objects that are not significant to the organisation's purpose, vision and mission. For example, objects with little or no provenance, the significance of which cannot be ascertained, will sometimes fail to be of value to the museum or the community it represents. Rationalisation is the process of clarifying that level of significance and prioritising your future actions in relation to elements of your collections. It is only through correct rationalisation that you can accurately assess storage needs, exhibition plans, or disposal strategies.
Acquisition Significance Action Plan	The key to maintaining a vibrant and relevant collection is to ensure that each new acquisition is identified and confirmed as significant to the purpose of the museum, whether for display, research or other key organisational aims. Even if the purpose of the museum changes, maintaining a full record of acquisitions will help people to understand in the future why certain objects were collected. By identifying the significance of newly acquired items, you can ensure the collections you hold fit with the vision and purpose of your organisation and hold value for your communities. This will serve to mitigate potential resource problems in the future.
Exhibition Significance Action Plan	The careful choice of items to place in an exhibition will allow greater accessibility to a subject through appropriate interpretation. Sometimes the significance of an object or collection is intrinsic, but frequently the key to choosing the right object for an exhibition is in the value of the associated information. This Action Plan will help you identify items of significance to the subject, the audience and the mission of the museum.

When choosing which Action Plan to use, it will be important to bear in mind what is realistic and achievable within your organisation's available resources. At this point, it would be good to revisit the resources allocated during the project planning phase at Stage 1 to ensure they still meet the needs of the assessment, and to organise any necessary support and training for staff and volunteers who will be conducting the work. This process will help you to identify and allay any project risks and potential problems. Remember, you can adapt one of the four Action Plans to best meet the priorities, resources and capacity of your organisation / project team.

Outputs and outcomes

Once you've chosen the Action Plan you want to use, you may find it helpful to set out the outputs and outcomes of your Action Plan to check that these match with what you're hoping to achieve on completion of the assessment. A table like the one below may prove useful for organising your thoughts and providing something to refer to as you progress with your Significance Assessment. Some hypothetical examples have been given in the table below as examples of the types of outputs and outcomes you might identify.

Outputs	Outcomes
Tangible / quantifiable results of the Significance Assessment	*Intangible / qualitative results of the Significance Assessment*
X number of objects from the steelworks collection will be assessed	Connections will be made with community members with relevant lived experience to inform the Significance Assessment, including people from outside of Wales who have travelled to work in the steel industry
X number of records on the database relating to the steelworks collection will be updated as a result of the Significance Assessment	Associated communities will feel valued and involved in the process, and will be encouraged to connect further with the museum
A Statement of Significance will be written for the steelworks collection	Our understanding of the items we hold in the steelworks collection will be enhanced

The Action Plans

Each Action Plan is accompanied by a Prompt Sheet, which will provide a framework to structure your Significance Assessment discussion. Each **Action Plan** below has its own **Prompt Sheet**, which you can use to record information as you work through the collection chosen for assessment. The idea is that you discuss the significance of each object against the assessment criteria rather than using a scoring system. You may want to adapt these Prompt Sheets, for example, adding your own criteria, to meet the needs of your project. Scoring does not facilitate the more in-depth discussion needed to fully explore the significance of museum collections, so a different approach is needed than that used during Stages 1 and 2 to identify and review collections. The methods employed in Finland (Analysing Significance 3 - ICOM Finland) and the Netherlands (Assessing Museum Collections - Collections valuation in six steps, Cultural Heritage Agency of the Netherlands) are good examples of how a qualitative approach can be adopted to achieve a fuller and more comprehensive assessment of collections significance. We would advise that you spend some time exploring the Finnish and Dutch sector approaches to significance assessment before embarking on your own discussions.

Defining Status Action Plan

You can use this Action Plan to define significance in several different ways and tailor it to whatever type of significance you are aiming to explore. It may be local and community significance, how the collection helps to tell the story of Wales and its people, or perhaps to confirm your belief that objects in the collection are of international importance.

The **Defining Status Action Plan** will help you to answer one or more of the following questions:

Does the collection match closely with your organisation's purpose, vision and mission?

Is the collection significant for your area's local heritage and that of local communities?

Does the object or group of objects hold potential for telling the story of Wales and its people, or possibly hold international significance?

What the Defining Status Action Plan will help you to do

Identify star collections or objects that strongly represent the purpose of your organisation and hold great relevance and value for your local community / communities.

If you believe you hold collections of potential Welsh or international significance, it can also help you to determine the strength of that claim.

Identify signature or star collections or objects, which appear to add value to the history of Wales and its communities and/or hold international importance.

Use the information gathered and input from subject specialists as evidence of these objects' national and/or international significance.

Collections can be significant to your local communities. At the same time, those objects could also play a wider role in telling the story of Wales and its people, or possibly hold international importance. Identifying the significance of a collection to a particular community is something most museums can achieve through exploring associated collections information and by consulting with the community concerned. Attempting to determine wider significance may be more difficult and will require a careful approach backed up by verifiable information. The key clue to the wider significance of an object or group of objects is whether the loss of that object or objects would have an impact on our ability to tell the story of Wales and its people, or would it be it be a loss to all people (as defined in the Hague Convention).

Many will feel that most community collections in Welsh museums form part of the history of Wales, but we must be careful to ensure that the definitions used to determine national significance are consistent, have been pre-agreed, and do not overstate the importance of the museum's collections generally. Claiming that all the collections held by the museum relating to Welsh history are crucial to the telling of the nation's story may devalue the importance of the museum's community purpose. It must also be said that holding objects of community significance does not make those collections of lesser cultural and historic value than those with national or international importance. A strong community purpose is something to be celebrated. However, we must consider carefully when deciding which objects to define as nationally or internationally significant.

Whether exploring local community or wider significance, any research carried out into the objects being assessed and then recorded in a Statement of Significance must be backed up by specialist input from an expert in the field or through published articles. This will ensure that the Statement of Significance made to record the status of a collection can be verified.

Case study

Cyfarthfa Band Collection, Cyfarthfa Castle

The museum team worked through Stages 1 and 2 of the toolkit to understand the resources required and to select which part of the collection would be most suitable for significance work. Stages 1 and 2 highlighted the importance of choosing a collection which is easy to access and to consider the space where the work on the collection could take place. The Cyfarthfa Band collection was identified as a good candidate because it was accessible (both on display and in the stores), has some interesting and rare pieces, strong community connection and has been used for research including work by the Royal College of Music. The team are now working on a Statement of Significance using the Defining Status Action Plan prompt questions.

What you will need to do:

1. Explore what information you already hold about the objects in the review collection.
   - Entry form with information recorded at the time the object(s) entered the museum's care
   - History file with associated documents, photographs, drawings and any previous research conducted into the object(s)
   - Object records - database entries and/or index cards and accession register entries
   - Archival material and photographs to add further depth to what is known about the objects – these items may give information about who owned the objects, where they were purchased and from whom, how they were made and how they were used.

2. Conduct further historic / desk research into the objects to gain a good understanding of the objects held, and their potential significance.

   N.B. if assessing potential Welsh or international significance consider carefully the type of research you need to do to help determine the importance your collection holds. For example, look at similar collections held by other museums and read relevant published articles about the subject and other similar collections.

3. Identify communities associated with the review collection and research how best to contact them. For example, you might want to consult with (former) steelworkers to better understand tools and equipment held connected to the steel-making industry or if considering international significance, you may wish to connect with communities of peoples linked to particular objects or discrete collections who have moved to Wales from other places to understand how closely those objects relate to their personal stories.

4. Consult the relevant communities to better understand the relevance of the collections to their lived experience. This will enhance your organisation's understanding of the objects, and you will be able to use the information to inform your Collections Significance Assessment and improve your documentation.

5. After you've gathered the information you need to support a case for the significance of the collection, you can now present your findings to subject specialists and colleagues in the museum sector for peer review. You might consider seeking the input of a relevant Subject Specialist Network (please refer to the Subject Specialist Network Consortium website for details of the SSNs available), , a museum sector colleague who specialises in a relevant subject or an academic who has conducted research into a relevant subject.

   N.B. If your project is exploring Welsh or international significance, the work done as part of your Defining Status Action Plan will form the basis for presenting a case for national or international significance in the future. You will be able to take this work forward and seek further specialist input and verification should you wish to submit the collection for consideration as part of a Distributed National Collection or Collections Recognition Scheme should such a concept be established in Wales.

Case study

Hedd Wyn Collection, Yr Ysgwrn, Eryri National Park Authority

The ENPA team is keen to better understand the value of the discrete collections that make up the whole Hedd Wyn collection in contributing to the story of Wales and its people, and the potential international significance held in some of those objects. Working through Stage 1 identified two archival collections as being the strongest candidates for assessment: letters of condolence received on Hedd Wyn's death and material connected to the 1917 National Eisteddfod in which the poet was posthumously awarded what came to be known as *Y Gadair Ddu*. Following Collections Review at Stage 2, the Defining Status Action Plan will be used to help the team understand the significance of these objects in helping to reveal the impact of the young poet's death on people across Wales, together with how the tragedy of his death echoed the loss of 40,000 young Welsh people during the First World War. During the process, the ENPA team found they discussed potential future significance projects, which could involve collaborating with other institutions holding material relating to Hedd Wyn, to facilitate a wider understanding of cross-collection significance and engagement with new audiences.

Defining Status Action Plan - Prompt Sheet

These assessments should be used to build a Significance Statement related to community* or national status. This is a qualitative process requiring careful thought and debate related to a review of specific collections or objects. Remember that to prove status, a museum must be aware of any ownership, provenance, or other documentation issues and so the Collections Review stage must be completed prior to this analysis.

Is Accession Number present and confirmed as belonging to the object or objects?	Options: Not present, partially present, labelled, marked, boxed.
Does documentation confirm that ownership rests with the museum?	Options: no documentation, accession register entry without donor details, donor details noted but not confirmed, legal title confirmed.
What is the general condition of the object/ collection?	Options: Deteriorated beyond appropriate conservation measures, Poor but conservation costs prohibitive, Remedial work required, Stable but not display-worthy, Stable and display-worthy.
Does the object/ collection fit within the museum acquisition policy?	Options: No known relevance, Relevant to a previous period of collecting, Relevant to current acquisition policies.
Has the object/ collection been on public display over the past 5 years?	Options: No public engagement, Public engagement restricted due to condition/lack of correct security or environment, Occasional temporary exhibition, Permanent exhibition.
Does the object/ collection have a particular community* relevance?	Options: No specific community relevance, Perceived relevance to the community, Proven relevance through consultation and/or expert review.
Does the object/ collection have a particular relevance to one section of the community?*	Options: General interest/relevance only, particular relevance to one section of the population, Representative items of local historical or natural sciences significance, Representative of environmental issues, Representative of time-limited current/ popular affairs.
What community engagement has occurred in relation to the object/ collection?	Options: None or perceived interest, 'Passive' engagement through exhibitions or education, Consultative engagement through specific workshops or meetings.
Has the object/ collection been the subject of academic or scientific research into its status or provenance?	Options: None or assumed importance, in-house research or community consultation, peer review, published work, specialist report.
Does the item have a national (Wales) or international value?	Options: No national/ international relevance, Potential national/ international relevance but requires expert review, National/ international relevance confirmed through expert review or publication.
If required, add your own criteria below before starting to assess your object(s)	

*Community is defined as being the people and places associated with the mission of the museum. You must define your community correctly by asking yourself whether every section of the population and every type of environment is catered for. For instance, are you fully aware of the diverse nature of the population your museum serves? Do your collection and/or acquisition policies reflect your community? If not, what can be done to correct this?

Case study

Storiel and Bangor University Collections, Gwynedd Council

The collections team at Storiel in Bangor is responsible for the care and management of the Gwynedd Council museum collections and those belonging to Bangor University. Several discrete museum and university candidate collections were identified at Stage 1 with varying assessment goals connected to them, namely better understanding of local, community and Welsh significance, the need to inform rationalisation and potential disposal, and acquisition decision-making to deal with a historic backlog. The team's reasons for wanting to conduct a significance assessment were to better understand their collections, to inform interpretation, help them to engage with the public and highlight which parts of the collection significantly contribute towards telling the story of Gwynedd and its people. Stage 1 identified the Welsh costume collection, which covers Gwynedd and areas within the historic county boundaries, as being the strongest candidate for assessment. The collection is well documented, easily accessible and elements have already featured in several published subject specialist studies, providing good grounding for later peer review. The Defining Status Action Plan was tested and will be used by the team to identify which pieces of costume are most significant in contributing to an understanding of traditional dress in a North Walian context.

Writing a Statement of Significance

Once you've completed the above steps, you will be able to prepare a Statement of Significance for the assessed collection, which is based on thorough research and backed up by subject specialist knowledge. You may find the following example useful to guide how you approach writing your Statement of Significance. This example should be used as a guide only. It is important to tailor the Statement of Significance to the collection in question and the type of significance you were aiming to assess, as identified in the early stages of your project.

The following list offers suggestions of what you might consider including:

- Details of when the assessment was carried out and by whom

- Description of the object, group of objects or collection included in the Statement of Significance – detailed description and condition assessment

- Research into the object(s) or collection – provenance and collections information held, people consulted, historic research undertaken, including references

- The criteria against which the object(s) or collection has been assessed

- Outcomes of the assessment

- Statement summarising why the object(s) or collection is significant

- Note further research or consultation to be undertaken as part of ongoing assessment, plus any additional notes

Case Study – Ceredigion Museum, Woodworking Tools Collection

Museum name	Ceredigion Museum
Name of assessor	Heritage Consultant, Headland Design
Date of assessment	August 2019
Object / collection / batch name	Woodworking tools collection
Object accession number or collection sequence	Range of accession numbers
Current location	Bath Street Garage, Bath Street Attic store
Brief object/ collection description	Over 1,300 woodworking tools relating to a wide range of trades and craft activities
Materials used in construction	Wood, metal
Size	Varied
Condition assessment **very poor / poor / fair / good**	Condition of the collection ranges from very poor to good
Photograph or drawing	N/A
Matrix assessment combination	TBC

Detailed object description

A diverse collection of more than 1,300 individual items collected over a period of 40 years. It consists of group accessions as well as individual acquisitions from a wide variety of sources, and includes material donated to the museum and purchases from individuals, families and auction houses.

Detailed condition assessment

The condition of the majority of the collection was assessed as part of the *Hadau* project, when a team of staff and volunteers audited and updated the catalogue records of all of the tools. They also conducted a quick visual assessment. Items in poorer condition were highlighted and not considered for display.

Research and background

Research was carried out during the *Hadau* project, including identifying the tools and researching the manufacturers. No other research has been undertaken and there is a lot of scope for gaining greater understanding of the tools, their users and uses. This is therefore a preliminary assessment, which needs to be added to as more is learnt about the collection.

There is scope for working with Ceredigion Archives to place the tools in their historic context and several organisations could support this work, including the Tools & Trades History Society (TATHS).

Peer review and specialist input'

Input was sought from external specialists to deepen our understanding of the collection's significance and to ensure our conclusions were also informed by knowledge and assessments from outside of the organisation to serve as a form of peer review. The following people were consulted:

– External woodworking specialists
– Members of the Aberystwyth Men's Shed
– Woodworking students from the local FE college

Compare: Related places and items				
Relevant comparable collections include the National Museum Wales and the Museum of English Rural Life				
Assigning significance through key criteria:				
Historic	**Social**	**Artistic or aesthetic**	**Scientific, research or technical**	**Community value and impact**
X	X			X
Is the provenance good or bad?		Mixed		
Is the object / collection rare?		No, only in a local context		
What is the object /collection representative of?		Local trades and crafts in Ceredigion, 18th to 20th century		
Name an institution that holds a comparable collection /object?		NMW and MERL		
Is the object / collection complete? As an object or a series i.e. pair of shoes, teapot with a lid, complete set of medals.		No		
Is there potential for interpretive capacity? **What does it aid the interpretation of?**		Yes - ability to interpret key trades and different types of woodworking as well as local industry. Opportunity to use to interpret other parts of the collection including furniture and social history collections more widely. There is scope to use the tools to interpret working life and home life.		
Free text box (for additional notes)				
Provenance	**Rarity or representativeness**	**Condition or completeness**	**Interpretive capacity**	
	x		X	
Degree of significance International / National (Wales or UK) / Regional / Local		Regional and local		

Statement of Significance

Currently, not enough is known to provide a definitive view of the significance of the collection, but the list below shows the potential for developing knowledge and understanding in terms of the different ways of viewing significance:

Historic:

Additional research would enable an understanding of:

- Local trade and tradesmen
- Local firms and places of work e.g. Thomas Carriage works
- Changing tools, processes and woodworking techniques over time
- The pattern of life of local craftsmen, use of materials and the local craft economy

Social:

The collection is meaningful to contemporary woodworkers who are interested in the tools as evidence of past skills and techniques. It also provides insight into the practical use of tools that were common in the past, and there has been resurgence of interest in these in relation to issues such as climate change, zero carbon practicalities, social inclusion and health and wellbeing. There are groups in the Aberystwyth area who are interested in working with the collections to explore these issues further

Artistic/Aesthetic

Woodworkers see the tools as beautiful objects that speak of past craftsmanship – both relating to the use of the tools and the manufacture of these tools as objects. They represent quality craftsmanship and offer a much-valued connection with the people in the past who worked with wood in the same way as they do today.

Community value and impact:

The tools enable people today to connect with the lives of people in the past by representing the work that craftsmen did. Some also represent the quality of this work and the strong commitment to professional and high-quality work. They have meaning for modern woodworkers and are important in the current resurgence of woodland crafts and woodworking trades.

Representativeness:

This collection represents key trades which operated in Ceredigion from the 18th through to 20th century.

Interpretive capacity:

Most of the collection is not currently used either for display or public engagement. Additional research would enable the tools to be used to explore the themes highlighted above and help to interpret other collection items, including furniture, agricultural tools and the social history collections.

Case study

Creative Textiles Collection, Ceredigion Museum

The museum team secured development funding from National Lottery Heritage Fund and are developing a project for a new collections store. The project includes work to understand the significance of the collections and how collections can be used to discuss shared values. A Statement of Significance for the Creative Textile Collection (patchwork and quilts) draws on academic research, which helped to establish the national and potentially international significance of the collection, which incudes some rare examples, alongside community voices. The community valued the textiles for the thought and skill in creating the pieces, the care and stories of the owners, together with the legacy for future generations.

Rationalisation Action Plan

This Action Plan will help you to determine which objects in your collection may be candidates for disposal. You may have already identified objects, which you think should be part of a collections rationalisation, but this Action Plan will help you to work through those objects methodically, considering their merits against particular criteria to determine which items belong in the collection and which should be considered for disposal.

The **Rationalisation Action Plan** will help you to answer one or both of the following questions:

Does the object, group of objects or collection not hold significance for your organisation's purpose?

Does the object, group of objects or collection not significantly contribute towards the telling of local, national (Welsh) or international stories?

What the Rationalisation Action Plan will help you to do

Identify collections that don't match your organisation's purpose, vision and mission, don't hold particular significance or value for your local communities, or don't help you to tell the story of Wales and its people.

Rationalisation and disposal can be very scary words, but considering the resources you have available and where those resources should best be directed for the benefit of the museum, wider collection and your audiences, is an ethical consideration, and ensures the best management of the objects in your care.

Always ensure you are following established collections management guidance and working to current museum sector standards when identifying objects for potential disposal, such as **Collections Trust's Spectrum standard for Deaccessioning and Disposal** (Deaccessioning and disposal - the Spectrum standard). The **Museums Association's Disposals Toolkit** (Museums Association - Disposal Toolkit) offers useful advice for museums looking to rationalise their collections. Remember that even if an item does not achieve significance status in your museum, there could be another museum within which the item has a key purpose.

What you will need to do:

1. You may already have a list of objects from your collection that you have earmarked as candidates for potential disposal. Alternatively, you may be starting from scratch. Either way, the **Rationalisation Action Plan Prompt Sheet** can be used to help you work through your candidate objects methodically. Some of the objects on this list may present some of the documentation and conservation issues identified during Stage 1.

2. You may wish to work on an object by object basis, across collections, if your collection consists of several disciplines, or you may choose to focus on one discrete collection at a time to identify objects within that collection which, for example, do not meet your acquisition criteria, fit with your organisation's purpose, have sufficient information attached or whose condition is a hazard to the rest of the collection.

3. When working through the objects you think could be rationalised from the collection, it is important to check that the correct legal ownership paperwork is in place, i.e. do you hold entry paperwork from when the object entered the museum's care, proving that ownership of the object was transferred from the donor to the organisation? This needs to be in place to support your case for disposal, and to show that you have the legal right to dispose of the object(s).

4. Explore what information is held about each object:
   – Entry form with donor information and provenance of the object(s)
   – History file with associated documents, photographs, drawings and any previous research conducted into the object(s)
   – Object records - database entries and / or index cards

5. Conduct thorough research into each object earmarked for possible disposal from the collection or transfer to a handling / teaching collection. This will consist of consulting your collections documentation records, historic research and consulting with subject specialists, where needed.

6. Examine the object to be added to the disposal list – if your records reveal little information about the item, are there any distinctive features, such as makers' marks, place of manufacture, or identifying marks made by previous owners that might help you to gather more information about the object? Could these marks help to reveal previously unnoticed significance?

7. What is the condition of the object? The condition of some objects may lead to their inclusion on a disposal list. For example, a wooden item severely damaged by woodworm may be beyond repair, and a potential hazard to the rest of the collection if the infestation is untreated or requires repeat attention each spring, taking valuable resources away from other more significant items in the collection.

8. Are there any communities associated with the objects listed as disposal candidates? Consulting with associated communities could reveal previously unrecognised significance of these objects, even those with little or no associated information / provenance attached.

9. Once you've compiled a list of objects selected for potential disposal, follow the procedures set out in the Collections Trust's Spectrum standard for Deaccessioning and Disposal and the Museums Association's Disposal Toolkit.

The **Rationalisation Action Plan Prompt Sheet** will help you to identify and assess objects that may be candidates for potential disposal but proceed only if you are able to confirm ownership and you satisfy the ethical issues associated with such disposal.

Rationalisation Action Plan – Prompt Sheet

Rationalisation can mean many things, for example: prioritising storage, developing exhibition plans, or starting a disposals strategy. This is a qualitative assessment, and the prompt sheet can be used as an aid in developing a logical approach to ensure you consider all important evidence. It is not exhaustive, and you should consider different or additional prompts that befit your own museum and the reasons for your action. If disposal is being considered, then use the appropriate ethical standards.

Is Accession Number present and confirmed as belonging to the object?	Options: Not present, partially present, labelled, marked, boxed.
Does documentation confirm that ownership rests with the museum?	Options: no documentation, accession register entry without donor details, donor details noted but not confirmed, legal title confirmed.
What is the general condition of the object/ collection?	Options: Deteriorated beyond appropriate conservation measures, Poor but conservation costs prohibitive, Remedial work required, Stable but not display-worthy, Stable and display-worthy.
Does the object/ collection fit within the museum acquisition policy?	Options: No known relevance, Relevant to a previous period of collecting, Relevant to current acquisition policies.
Is there sufficient and appropriate storage/ display space to support the item(s)?	Options: Difficult to provide sufficient space, Poor space possibly available, Correct storage conditions available.
Does the object/ collection have a particular community* relevance?	Options: No specific community relevance, Perceived relevance to the community, Proven relevance through consultation and/or expert review.
Does the object/ collection have a particular relevance to one section of the community?*	Options: General interest/ relevance, particular relevance to one section of the population, Representative items of local historical or natural sciences significance, Representative of environmental issues, Representative of time-limited current/ popular affairs.
Does the object/ collection fit better within the collecting policy of another museum?	Options: No relevance known (after investigation), Relevance to another museum but not required, Relevance to another museum and required by that museum.
Does the object/ collection have a national (Wales) or international value?	Options: No national/ international relevance, Potential national/ international relevance but requires expert review, National/ international relevance confirmed through expert review or publication.
If required, add your own criteria below before starting to assess your object(s)	

*Community is defined as being the people and places associated with the mission of the museum. You must define your community correctly by asking yourself whether every section of the population and every type of environment is catered for. For instance, are you fully aware of the diverse nature of the population your museum serves? Do your collection and/or acquisition policies reflect your community? If not, what can be done to correct this?

Acquisition Significance Action Plan

Deciding to accept an object or group of objects into a museum's collection is an important decision, which requires careful consideration bearing in mind relevance to the museum's remit, collections development priorities and available resources, including storage and other facilities needed to care for the object(s). Approaching this process from the perspective of determined significance is a useful way of ensuring you're making a considered and informed decision. It can also provide you with the basis to explain to potential donors why you aren't able to accept their donation into the collection.

The following Action Plan is designed to be a straightforward and quick means of deciding whether to accept an object or objects into the collection.

The **Acquisition Significance Action Plan** will help you to answer the following question:

Does the object or objects fit the organisation's purpose, vision and mission, and meet your current collections development priorities?

What the Acquisition Significance Action Plan will help you to do

Decide whether you should accept an object or objects into the collection based on a set of important criteria, including whether the items align with the museum's remit, fit with your current Collections Development Policy, and you have the necessary resources to provide proper care and management

What you will need to do:

1. Use this Action Plan alongside your usual entry procedures.

2. You may choose the **Acquisition Significance Action Plan Prompt Sheet** as another official entry document, which becomes part of your documentation procedures.

3. As this may be a new way of working for the museum's staff, you may wish to organise training so your colleagues feel comfortable with the new system and confident in applying it.

The Acquisition Significance Action Plan can be used to assess a potential donation's significance. If significance is not confirmed, then closely consider whether the object or objects concerned should be added to your permanent collection.

This Action Plan has been designed to be incorporated into your usual entry level procedures and act as a useful tool to assist with the decision-making process when considering whether to accept a donation or acquire through purchase. It will help you to avoid future resource and collections information issues by preventing that at source through making well-informed decisions. If using the Acquisition Significance Action Plan, it is still important to work through the relevant elements of Stages 1 and 2 as you need to understand your collections, the state of your documentation and available resources to make an informed decision about what to accept into the collection. The intention is that adopting this process will avoid creating future resource and documentation problems. Working through this process will also contribute towards the development of comprehensive entry paperwork and history files, which will in turn feed into other collections management records and future significance assessments.

Acquisition Significance Action Plan – Prompt Sheet

The purpose of the Acquisition Significance Action Plan is to confirm the significance of an object prior to accepting it into the collection. This is a qualitative process requiring careful thought and debate and a full understanding of the museum's mission. Your collecting policies will define the legal and ethical issues – this action plan asks you to consider proof that the proposed acquisition truly reflects the museum's purpose and the community* it serves.

Can you confirm that ownership can be transferred to the museum?	Options: No evidence available, Potential donor details confirmed, Donor details and signature provided
If appropriate, can intellectual property rights be transferred to the museum on acquisition?	Options: intellectual property status unknown, intellectual property not transferrable, intellectual property can be transferred as confirmed by holder
What is the general condition of the object/ collection?	Options: Deteriorated beyond appropriate conservation measures, Poor but conservation costs prohibitive, Remedial work required, Stable but not display-worthy, Stable and display-worthy.
Does the object/ collection fit within the museum acquisition policy?	Options: No known relevance, Relevant to a previous period of collecting, Relevant to current acquisition policies.
Is there sufficient and appropriate storage/ display space to support the item?	Options: Difficult to provide sufficient space, Poor space possibly available, Correct storage conditions available
Could the object/ collection be placed on display following any necessary conservation treatment?	Options: No option to display, No option to display but object/collection has research value, Item(s) could be displayed after reorganisation of current displays or through temporary exhibition, Item(s) easily placed on display within existing exhibitions.
Does the object/ collection have a particular community* relevance	Options: No specific community relevance, Perceived relevance to the community, Proven relevance through consultation and/or expert review.
Does the object/ collection have a particular relevance to one section of the community*	Options: General interest/ relevance, particular relevance to one section of the population, Representative items of local historical or natural sciences significance, Representative of environmental issues, Representative of time-limited current/ popular affairs
Has the object/ collection been the subject of academic or scientific research into its status or provenance?	Options: None or assumed importance, in-house research or community consultation, peer review, published work, specialist report.
Does the item have a national (Wales) or international value?	Options: No national/ international relevance, Potential national/ international relevance but requires expert review, National/ international relevance confirmed through expert review or publication
If required, add your own criteria below before starting to assess your object(s)	

*Community is defined as being the people and places associated with the mission of the museum. You must define your community correctly by asking yourself whether every section of the population and every type of environment is catered for. For instance, are you fully aware of the diverse nature of the population your museum serves? Do your collection and/or acquisition policies reflect your community? If not, what can be done to correct this?

Exhibition Significance Action Plan

You can use this Action Plan to identify collections or objects that add value to an exhibition or display, whether of a temporary or semi-permanent nature. In preparing an exhibition, key considerations must be a clear definition of the subject area and the nature of the audience. Unless the subject is made accessible to the audience through the exhibition then the museum is failing to meet its primary objectives.

The **Exhibition Significance Action Plan** will help you to answer one or more of the following questions:

Does the collection / object match closely the purpose of the proposed exhibition / display and does it add value to the subject?

Is the collection / object supported by sufficient associated information to enable intellectual access by your chosen audience?

Are you including the collection / object in the display because it has significance to the purpose of the exhibition or simply because it has general significance to the museum?

What the Acquisition Significance Action Plan will help you to do

Identify objects or collections that strongly support the purpose of an exhibition by providing a direct and accessible link to the primary subject area(s).

Create a hierarchy of relevant objects that can help in designing an exhibition that fulfils the pre-defined purpose by making the subject accessible to as many of the museum's visitors as possible.

Exhibition design is a complex and involved process and this Action Plan will not be a substitute for expertise in this field. It will, however, enable the creation of a list of relevant objects or collections that can be considered during the design stage of any proposed exhibition. The Action Plan assumes that the subject area or areas have been defined and also that work has been undertaken on trying to analyse the nature of the intended audience(s). These are crucial steps in the development of any exhibition. A statement on the theme(s) and audience(s) should be developed and used to inform the process of choosing objects for inclusion. The Exhibition Significance Action Plan is there to support that choice of objects once the theme or themes have been agreed.

Remember that it can be tempting to include as many objects as space permits in any exhibition or display, but overloading in this way can often lead to confusion. The **Exhibition Significance Action Plan Prompt Sheet** provides an opportunity to create hierarchies of objects or collections based on several parameters. Use this to ask critical questions as to the relevance of the objects to the subject(s) and audience(s) as well as ensuring that true and accurate associated information is available to ensure succinct but unambiguous interpretation.

What you will need to do:

1. Explore what information you already hold about the objects in the review collection.
   – Entry form with information recorded at the time the object(s) entered the museum's care
   – History file with associated documents, photographs, drawings and any previous research conducted into the object(s)
   – Object records - database entries and/or index cards and accession register entries
   – Archival material and photographs to add further depth to what is known about the objects – these items may give information about who owned the objects, where they were purchased and from whom, how they were made and how they were used.

2. Conduct further historic / desk research into the objects to gain a good understanding of the objects held, and their potential significance.

3. Identify communities associated with the collection and research how best to contact them.

4. Consult the relevant communities to better understand the relevance of the collections to their lived experience. This will enhance your organisation's understanding of the objects, you will be able to use the information to inform your Collections Significance Assessment, improve your documentation and ultimately, develop effective interpretation of the associated objects.

5. Conduct further research into the potential significance of the collection or object against the theme and design parameters set for the exhibition.

6. Test the accessibility of associated information or any intrinsic characteristics of the object or collection

7. Create a long- and then short-list of the objects chosen during the action planning process. The sifting process should ideally involve representatives of the proposed audience to ensure relevance and to remove bias or any perceived significance derived from familiarity with the objects concerned.

Case study

Football Museum for Wales

The museum team at Wrexham have recently undertaken a Significance Assessment for the Welsh Football Collection to support the development of a new museum and to help secure funding. The appointment of a football curator in 2021 was central to this process. The value of much of the collection is connected to specific players and games and the knowledge and experience of the curator, which hadn't been available to the museum previously, ensured that the collection was greater understood from this perspective.

Exhibition Significance Action Plan – Prompt Sheet

The purpose of the exhibition significance action plan is to help determine the items that might be used in an exhibition or display on a particular subject using objects either within the museum collection or potentially available for temporary loan. This is a qualitative process requiring careful thought and debate and a full understanding of the museum's mission and the exhibition's purpose. You must also be fully aware of the needs of your clientele; not only will this help you to develop appropriate interpretation, but it will also feed into the choice of objects to be used.

Is the object directly related to the primary purpose of the exhibition?	Options: No direct connection but can be used to illustrate an interpretation point, No direct connection but similar to key items covered by the subject, Directly related to the subject of the exhibition, Essential to ensure correct interpretation.
Is the object intrinsically accessible to a wide audience?	Options: Obscure form requiring substantial interpretation, Complex but achievable interpretation, Unfamiliar historical or scientific object, Familiar object easily interpreted.
Does documentation confirm that title or a loan agreement is held by the museum?	Options: no documentation, accession register entry without donor details, donor details noted but not confirmed, loan agreement lapsed or ends imminently, legal title confirmed, loan agreement in place for the duration of the exhibition
Are there specific donor/ lender conditions that might preclude use?	Options: Security and environmental conditions restrictive, Copyright conditions apply and require monitoring, Other restrictions apply but are manageable, No restrictions.
Are there specific insurance requirements for the object?	Options: Government Indemnity Scheme conditions, Other insurance restrictions or prohibitive insurance valuations, Achievable conditions to permit appropriate insurance protection.
Is there sufficient and appropriate display space to support the item?	Options: Difficult to provide sufficient space, space possibly adaptable but may displace other items, display space commensurate with the size/ nature of the item.
Does the item require specific environmental conditions to avoid excessive deterioration?	Options: Highly susceptible to a range of agents of deterioration, Sensitive items but controlled display conditions could mitigate against excess deterioration, Requires stable environment available within the display space, No specific environmental conditions required/ minimal deterioration anticipated, Could be placed on open display.
Has the object/ collection been on public display over the past 5 years?	Options: No public engagement, Public engagement restricted due to condition/lack of correct security or environment, Occasional temporary exhibition, Permanent exhibition.
Is there sufficient associated information available?	Options: Basic information confirming identity, Associated information includes background history/ownership, Previous display interpretation available but not confirmed, Previous display interpretation available and confirmed.
What community engagement has occurred in relation to the object/ collection?	Options: None or perceived interest, 'Passive' engagement through exhibitions or education, Consultative engagement through specific workshops or meetings.
Does the item have a national (Wales) or international value?	Options: No national/ international relevance, Potential national/international relevance but requires expert review, National/ international relevance confirmed through expert review or publication.
If required, add your own criteria below before starting to assess your object(s)	

Writing a Statement of Significance

Once you have completed the above steps you will be able to create a valid list of objects or collections to be included in the exhibition. It might be helpful to marshal the facts already gathered into statements of significance regarding the objects chosen. This could help with developing the exhibition design by highlighting the primary objects for inclusion at the main focal points within the displays. While these statements of significance may be related principally to the subject of a particular exhibition, the information gathered might prove useful in other significance work within your collections.

The following list offers suggestions of what you might consider including:

- Details of when the assessment was carried out and by whom

- Description of the object, group of objects or collection included in the Statement of Significance – detailed description and condition assessment

- Research into the object(s) or collection – provenance and collections information held, people consulted, historic research undertaken, including references

- The criteria against which the object(s) or collection has been assessed

- Outcomes of the assessment

- Statement summarising why the object(s) or collection is significant

- Note further research or consultation to be undertaken as part of ongoing assessment, plus any additional notes

Case study

Llanelly Pottery, Parc Howard Museum & Art Gallery

A project called Pottery Stories at Parc Howard Museum created a new co-curated display of the Llanelly Pottery collection. The research and community engagement provided a fresh perspective and an opportunity to understand the significance of the collection. The project included conservation work that helped to understand the history of the collection; research brought external views including collectors and peers and community activities created opportunities for community voices. This has enabled the team to produce a Statement of Significance for the collection and to be able to add information about the value of particular pieces to the Carmarthenshire Museum Service.

STAGE 4

Review and Reassess

Within this Stage you will:

Consider what you have achieved against your intended aims (defined at Stages 1 and 2)

Did everything proceed smoothly or were there issues? Can you rectify those issues before starting a new assessment process?

Discuss ways of working better

Are there easier options to achieve the desired outcomes and outputs based on experience? Compare your processes against other people's experiences.

Apply your review findings to all further assessments

Learn by what went well and not so well.

Reviewing your project

When you've completed your current Action Plan it's important that you reassess the priorities you set out at the beginning of the project (Stages 1 and 2). The process of a Collections Significance Assessment is likely to be an ongoing project, one involving many tasks, which you return to over time. The concept of what is significant can shift, and at a future date you may want to return to collections that have already been reviewed to reassess their significance based on new information or criteria. Once you have completed and reviewed your current project you may find that new issues have come to light that could result in you needing to reassess the priorities set out at Stage 1. Your experiences of working through Stage 3 (Action Plans) may lead you to believe that you need to revise your Collections Review at Stage 2.

Reviewing you project may take the form of a meeting with those colleagues involved in the Significance Assessment, similar to an end of project evaluation, where you can discuss:

– What worked well?

– What didn't work so well?

– What challenges you encountered?

– How you overcame any challenges?

– What could be improved next time?

– Any collections management or care issues identified and how they can be addressed?

– Priorities for the next significance assessment project?

This review stage is critical. It is important that an honest appraisal of the successes and difficulties noted in your completed project should be undertaken. Pay particular attention to whether you have achieved the stated aims identified at Stage 1 and 2 and whether the results you have created at Stage 3 are valid and verifiable. For instance, information about the anticipated resource allocations judged against actual expenditures are very valuable in ensuring that future resource estimates become more and more accurate.

If your work at Stage 2 has indicated further collections management issues, then it is best to start at Stage 1 and reconsider whether you need to reassess priorities and deal with those issues before moving to the significance assessment work.

Even if your collections management systems prove, at Stage 2, not to be accurate or comprehensive enough then it is possible to revise your priorities. Simply identify a manageable project that allows for meaningful significance work based on available collections management information and available resources. Even if you are dealing with one small part of the significance priorities, it is at least one less task to consider in the short term.
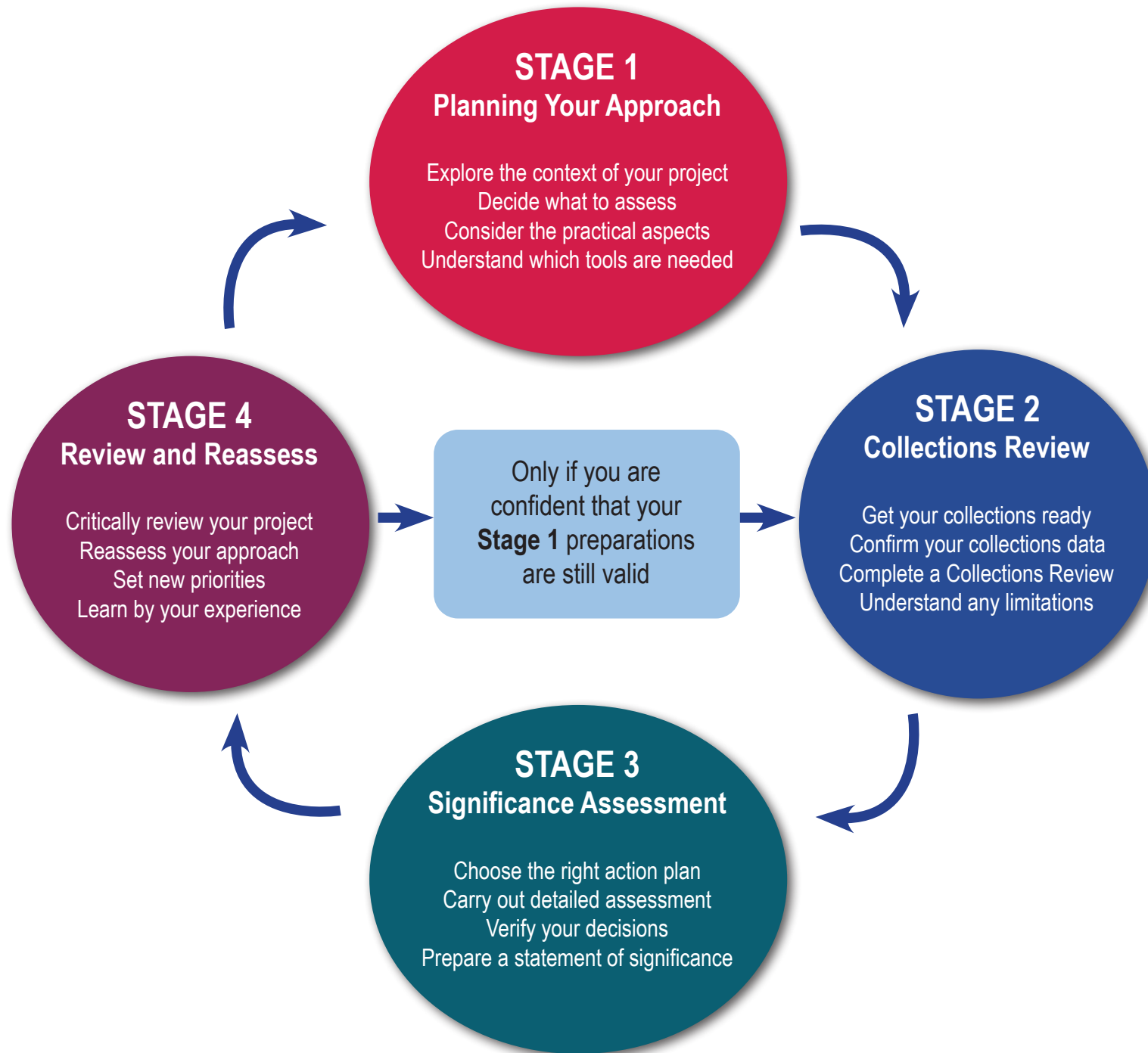
Remember though:

- There are no 'quick and easy' significance assessments. They demand resources and adequate background data and should be planned well in advance.

- Despite the resource implications, museums should aim to ensure that Collections Review and Significance Assessments become a constant element of museum work that need to be subject to periodic evaluation and achievable project development work.

- Very few museums will be able to tackle every significance job all at once and so a phased approach is necessary.

- Do not dismiss the need for significance assessments due to a lack of time or other resources. Scale your approach to what is realistic and achievable. Museums may only have the resources to tackle a small area of significance work at a time but each of these, over time, will build to an important resource.

Finally, best of luck with your chosen project!

A diagram setting out the four-stage process and a glossary of terms used in this toolkit can be found on the following pages.

This toolkit has been put together by Headland Design and Kevin Mason

STAGE 1
Planning Your Approach

Explore the context of your project
Decide what to assess
Consider the practical aspects
Understand which tools are needed

STAGE 4
Review and Reassess

Critically review your project
Reassess your approach
Set new priorities
Learn by your experience

Only if you are
confident that your
Stage 1 preparations
are still valid

STAGE 2
Collections Review

Get your collections ready
Confirm your collections data
Complete a Collections Review
Understand any limitations

STAGE 3
Significance Assessment

Choose the right action plan
Carry out detailed assessment
Verify your decisions
Prepare a statement of significance

Glossary of terms used in this toolkit

Accession Files All correspondence and other records related to the transfer of title of an object or collection into the museum.

Accession Number A unique number that clearly identifies a museum object and links that object to all associated information through documentation.

Acquisition Receiving and recording the title to items donated, bequeathed, purchased or otherwise received by a museum .

Acquisition Policy A museum's statement about what it will and will not acquire and accession into its permanent collection.

Collections Development Policy Document detailing a museum's statement of purpose, overview of current collections, themes and priorities for future collecting, rationalisation and disposal, and a legal and ethical framework for acquisition and disposal.

Collections Review A process at Stage 2 to determine the standard of collections management attached to a collection or object such as correct documentation, storage, environment, etc.

Community The museum's audience and stakeholders; primarily used in defining the purpose of the museum and its collecting activity. It can also be used as a term defining a particular section of the population such as through ethnic grouping, religious beliefs, sexual orientation, etc. The museum needs to ensure that all relevant and potentially disadvantaged communities are included in its purpose.

Conservation Remedial Conservation refers to the treatment of objects or collections to prevent their deterioration; Preventive Conservation refers to the action of ensuring that the environment within which objects or collections are held is conducive for the purpose of reducing their deterioration.

Copyright The right to reproduce, distribute, or otherwise use protected material as defined under the Copyright, Designs and Patents Act 1988 amended 2014, or any subsequent legal instruments.

Deterioration The effects of various agents such as light, UV light, relative humidity fluctuations, etc. on objects; this should be reduced to the minimum possible through remedial conservation measures if feasible.

Disposal The process of deaccessioning previously acquired objects or collections according to the legal powers of the museum and any agreed policy and professional standards.

Documentation The evidence and associated information that identifies the object or collection and ensures that this information is linked to the object or collection no matter where the items are held in the museum or elsewhere.

Entry Form A two-stage receipt form used to acknowledge temporary transfer of an object into the care of a museum pending further research, identification or a decision on acquisition with an option to complete acquisition through signature of the donor or vendor.

Environment

The quality of the space in which the object or collection is kept; this could include measurements of light levels, UV light, temperature and relative humidity, etc.

Handling

Physical transfer of objects or collections from one location to another or for examination or treatment; careful handling is always necessary to avoid damage to the objects and to prevent injury to the handler.

International

In this toolkit, international is used as a term that encompasses 'all peoples', as defined in the Hague Convention 1954 and elsewhere to mean mankind.

Intrinsically Accessible

An object or collection that is easily recognised for what it is purely from its form and nature, requiring little additional interpretation; this can be a very subjective assessment and requires care.

Label, Labelling

Removable label identifying an object's accession number such as a tie-on label, display interpretation, or box description.

Location

The current location of an object or collection within the museum; this could be an identifiable location on display, store, conservation lab, etc.

Mark, Marking

Semi-permanent method of applying an accession number to an object. This should be reversible but not easily removed.

Matrix

A scoring sheet to help to understand the status of a collection or object in regards suitability for assessment or in a collections review.

National

In this toolkit, national refers to the Welsh community as a whole rather than to individual communities attached to a museum. A national museum would already define its community in this way.

Object Name

Name given to a single object; this could be a common name, scientific name or detailed definition in common use.

Outcomes

Intangible results from a process or strategy such as an improvement in community engagement.

Outputs

Tangible results from a process or strategy such as a report or statement.

Outside Support

Intellectual opinion or technical assistance required to deal with objects or collections that is not available from within the museum.

Ownership

The confirmed legal title to an object or collection.

Perceived Significance

A notional assessment of the likely importance of an object or collection; this can sometimes be a long-standing historical acceptance that has never been challenged or might be based on untested personal assertions.

Philosophical Approach

In the context of Stage 3, considering the widest possible qualitative data when considering a collection or object's significance; this is the opposite of attempting to define significance using a numerical scoring sheet.

Planning	At Stage 1, understanding the full requirements of your chosen project before first embarking reviews and assessments; identifying potential issues as well as anticipated outputs and outcomes; setting targets based on the needs of the museum.
Provenance	The original location, locations, or context within which an object or collection was formed; information relating to associated people (maker, past owner etc.); within art collections in particular this is often used to describe the history of ownership.
Rationalisation	Prioritising collections / objects in terms of the specific requirements of a museum; this could include storage reorganisation, application of limited resources, or potentially for a disposals process.
Relevance	The way in which an object or collection supports the primary requirements of the museum and/or its communities as set out in the museum's mission, vision, and purpose.
Resources	People, time and money required to achieve a task.
Review and Reassess	The Stage 4 process of critically reviewing the activities of your significance assessment work from Stage 1 through to Stage 3 with the purpose of learning by what went right and wrong.
Significance	The importance of a collection or object in the context defined by a museum or its community.
Significance Assessment	The process at Stage 3 of producing a statement on the importance of a collection or object in relation to the priorities agreed by a museum.
Significance Statement or Statement of Significance	A written assessment of a collection or object that considers the importance of the item(s) in the context of the museum's mission and purpose, or in the wider international context such as defined under the Hague Convention (1954).
Stage	A separate element in the process of assessing significance in the context of this toolkit.
Storage	The easily identified location where objects or collections are held when not being used for display, research, or other purpose.
Title Form	A transfer of title record acknowledging that an object's ownership now rests with the museum.
Worksheet	Sample blank tables or Excel spreadsheets designed to assist in the choice of the candidate collections that may be used at Stage 2 and Stage 3.
Workspace	The physical space allocated for the purposes of dealing with objects or collections.