



## West Somerset Railway Heritage Trust

Registered Charity No. 265564



### Museum Collection Development Policy 2020 – 2025

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#### Relationship to Other Relevant Policies and Plans.

- 1) The West Somerset Railway Heritage Trust (WSRHT) main aims are:
  - a) Preserving and displaying heritage items relating to railways and the West Somerset Railway (WSR) in particular and interpreting and curating all the heritage assets owned by the Trust.
  - b) Restoring the heritage carriages owned by the Trust for display and operation on the railway.
  - c) Managing the museums at Bishops Lydeard and Blue Anchor.
  
- 2) In addition, and through the museum (one museum on two sites):
  - a) Innovatively engaging with our visitors and local communities.
  - b) Providing opportunities for object-based learning, inspiration and enjoyment.
  - c) Managing an active Schools Programme that offers clear curriculum-links to both History and the STEM subjects. The WSRHT offers a broad range of Learning Sessions which can be delivered either in the museum or in the school classroom.
  - d) Caring for and improving access to our important collections and heritage sites.
  
- 3) To ensure that both acquisition and disposal are carried out openly and with transparency.

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- 4) By definition, the museum has a long-term purpose and holds collections in trust for the benefit of all visitors and the West Somerset Railway and in relation to its stated objectives. The Trust therefore accepts the principle that sound curatorial reasons must be established before consideration is given to any acquisition to the collection, or the disposal of any items in the museum's collection.
- 5) Acquisitions outside the current stated policy will only be made in exceptional circumstances.
- 6) The museum recognises its responsibility, when acquiring additions to its collections, to ensure that care of collections, documentation arrangements and use of collections will meet the requirements of the Museum Accreditation Standard. This includes using the SPECTRUM 5 primary procedures for collections management. It will take into account limitations on collecting imposed by such factors as staffing, storage and care of collection arrangements.
- 7) The museum will undertake due diligence and make every effort not to acquire, whether by purchase, gift, or bequest, any object or specimen unless the Trust or responsible officer is satisfied that the museum can acquire a valid title to the item in question.
- 8) The museum will not undertake disposal motivated principally by financial reasons.

### **History of the Collections.**

- 1) The West Somerset Railway Heritage Trust took responsibility for managing and developing the Gauge Museum in 2017 prior to this the museum had been managed by the West Somerset Railway Association. The museum was founded in and around 1980 in the original Bishops Lydeard Station Goods Shed that dates from 1876. The original intention when the museum opened was to educate visitors about the West Somerset Railway and railways in the Southwest generally. Therefore, from its earliest days it collected broadly in the fields of railway artefacts and railway memorabilia from the Great Western Railway and Southwest railways generally.
- 2) The Blue Anchor Museum had been managed by the Trust from its inception, the Trust now considers there to be one museum on two sites, Bishops Lydeard and Blue Anchor.

### **An Overview of Collections.**

- 1) The collection contains over (final total to be confirmed) accessioned artefacts and railway memorabilia relating to railways and the West Somerset Railway (WSR) in particular, interpreting and curating all the heritage assets owned by the Trust including books, maps, social and references to the environmental impact of railways. In addition, the Trust promotes Museum-Based Learning Sessions based on the 2014 National Curriculum, and using a range of real and replica objects, runs a number of museum sessions exploring local and national history, and also providing links to the STEM subjects.

### **Themes and Priorities for Future Collecting.**

- 1) To document the West Somerset Railway and its surroundings and environment:
  - a) to celebrate and respond to local people.
  - b) to provide inspiration for learning and creativity.
  - c) to encourage debate on environmental and other issues.

- 2) An object should only be acquired if it meets at least one of these criteria, and the majority must fulfil the first criterion. Additional criteria are also considered to ensure a proper process and sound resource management.

### **Current Aims.**

- 1) Preserving and displaying heritage items relating to railways in the Southwest and the West Somerset Railway (WSR) in particular.
- 2) Interpreting and curating all the heritage assets owned by the Trust.
- 3) Managing a Schools Programme that offers clear curriculum-links to both History and the STEM subjects.
- 4) Restoring the heritage carriages owned by the Trust for display and operation on the railway.
- 5) Managing the museum at Bishops Lydeard and Blue Anchor to create one museum on two sites.
- 6) The public will be able to engage with the museum's collections online through the Web site [www.wsrht.co.uk](http://www.wsrht.co.uk) on Facebook and by visiting the museum. Entry to the museum is free although there are plenty of opportunities for visitors to make donations. It is planned to display the collection online, although there is still much work to do on that project.

### **Criteria for the Significance of the Object.**

- 1) The numbered list below is the main priority for the majority of acquisitions, but the museum recognises the requirement to collect some items that are not directly related to the region in response to clearly identified needs and aspirations of local people.
- 2) Geographic significance.
  - a) The museum's collection has an important role in providing a sense of place for people and the surrounding area by acquiring objects that document railway history and environment. Collections should concentrate on items that have strong association with railways in the Southwest of England.
- 3) Cultural and contemporary significance.
  - a) The museum should actively collect objects with clear relevance to and association with railways in the Southwest of England. It will encourage people-based collecting, particularly working with existing, self-defining groups within the railway environment rather than as individuals. Priority will be given to collecting objects that reflect the interests of the West Somerset Railway. This may involve acquiring objects with strong meaning for particular groups of local people, including objects from around the world. High priority will be given to objects that reflect railway based contemporary life in the Southwest of England. The museum recognises that acquiring contemporary material is problematic, particularly as few contemporary items are offered as gifts to the museum and because the range of items that could be acquired is extensive.
- 4) Learning and Creative significance.

- a) Priority will be given to objects with immediate use within the museum's public programme or which meet the needs of a particular audience, for example, the National Curriculum for schools or reminiscence boxes. Objects already in the collections can meet most current needs for handling and educational activities, but these will occasionally need to be supplemented by collecting where a clear demand can be demonstrated.
  - b) All acquisitions for handling should have good contextual and provenance information. The museum will not acquire items purely for temporary display purposes. To support the aims of 'innovatively engaging with our local communities' and of 'providing acclaimed opportunities for object-based learning, inspiration and enjoyment'. These parts of the collection are clearly identified in subject clarification and interpretation.
- 5) Environmental Significance.
- a) Items that document environmental change in the locality will be acquired, with reference to Geographic Significance that can be demonstrated to have a role in facilitating debate, discussion and understanding of environmental and conservation issues, such as climate change. Such acquisition will be carried out in consultation with interested environmental and education groups and organisations.

### **Limitations on Collecting.**

- 1) Selectivity and Sampling.
- a) The museum recognises the limitations of its resources in terms of staffing, storage and finance. All collecting must be selective. In all fields of collecting the museum will aim to employ recognised sampling strategies or to develop one if none is available. For material collected by others, the collector may be required to implement, and document recognised sampling strategies in consultation with the museum. Criteria for selecting among related significant items will include the long-term value and relevance, quality and in some cases the completeness of the item.
  - b) The museum will not usually attempt to collect exhaustive type series, even of local material, especially if this would involve collecting very large numbers of items. Particular caution will be applied to acquiring items in very poor condition, or especially large artefacts requiring extensive and expensive storage facilities.
  - c) Whenever possible the museum prefers to keep objects in context and will advise for their preservation in situ rather than acquisition for the collection, for example architectural features of important historic buildings or archaeological structures.
- 2) Active and Reactive Collecting.

The museum recognises the difference between:

- a) Active collecting – collecting planned, costed and initiated by the museum, although perhaps with the participation of others, and
- b) Reactive collecting – collecting initiated by other people and to which the museum responds.

The museum will adopt an active approach to collecting with specific areas of the collection.

The museum also recognises the resource implications inherent in an active collecting strategy and all project workgroups intending an acquisition to be a project outcome will involve the Acquisition Group in considering the cost of collecting at the outset.

3) Authenticity.

- a) The museum will not usually seek to acquire replicas, facsimiles or other forms of copies. The museum will seek outside advice on authenticity, if necessary, before purchasing items of considerable value. The museum will concentrate on acquiring 'real' things. Replicas or copies will only be acquired where the copy itself has developed an historic or artistic interest in its own right.

4) Conditions applying to Acquisitions.

- a) The collection of railway artefacts are either owned either by Trust or are currently on loan from other bodies or individuals. In this document, the term 'the collection' refers to the totality of these artefacts. All acquisition and disposal is carried out openly and transparently. The Trust has a long-term purpose and holds collections in trust in relation to its stated objectives.
- b) The decision to accept a particular item into the collection can be made by a single member of the museum staff. However, offers to the museum will be judged on merit and if required by the Trustees who will apply the criteria as set out below.
- c) The museum will not normally accept an acquisition to which any special conditions apply, such as need to display. However, when receiving grant-aid for a purchase, the museum is bound by any restrictions such charitable bodies impose.
- d) The museum will nevertheless always be sensitive to the feelings of donors, for example in the case of oral history recordings of a personal nature.
- e) The museum recognises that it may acquire culturally sensitive items that could have restrictions on the way that they can be used and kept. Reasonable restrictions will not preclude acquisition and the museum will try to identify any such restrictions and document them at the time of acquisition.
- f) The museum is not obliged to retain unsolicited gifts or bequest. Any items arriving in this way will be considered by the museum and if unsuitable for retention, discarded according to any legislation in force at the time.

As from 01 August 2022 objects loaned are only accepted from Accredited Museums or recognised Heritage Sites. No loans from individuals can be accepted – donations or bequests only. Any loans from Accredited Museums or recognised Heritage Sites are accepted for a maximum period of 12 months but are renewable by written agreement. Long term loans may be accepted subject to prior written agreement.

5) Documentation of Acquisitions.

- a) The museum will give priority to the acquisition of items with substantial accompanying documentation and supporting contextual material. Documentation will, wherever possible, include supporting photographic, oral history or archival contextual material.
- b) The decision to accept a particular item into the collection can be made by a single member of the museum staff. However, offers to the museum will be judged on merit and if required by the Trustees who will apply the criteria as set out above.
- c) The acquisition procedure is recorded and updated in the Trusts policies and procedures documentation. For any purchases or whenever large resources need to be made available in order to acquire an item or care for it long-term, the Trust must be consulted. Purchases must be made in accordance with the Trust financial regulations.
- d) The museum will not acquire any object or specimen unless it is satisfied that the object or specimen has been acquired legally and is not in violation of the laws and regulations.

- e) The museum recognises its responsibility to ensure the proper documentation of any items it acquires, and the need to make this documentation accessible as soon as possible to museum users through MODES (its computer database). Some information, such as the value of objects and the names of donors, must always be treated as confidential. In addition to information about an object's context, the museum will document the reason for the museum's collecting decision and that of anyone else involved in the selection of the object, and any restrictions that have been identified on the way that the object can be used or stored.
  - f) The museum will not acquire any object or specimen unless it is satisfied that the object or specimen has been acquired legally and is not in violation of the laws and regulations.
- 6) Copyright and Intellectual Rights.
- a) The museum will give priority to the acquisition of material for which it can also acquire the copyright. Where this is not possible, the museum will respect the rights of copyright owners, though it will seek to obtain licence to make copies, without incurring a fee, for the purposes of exhibition, marketing, educational use and preservation.
  - b) The museum will respect the intellectual rights of makers and seek to clarify any restrictions on the use and care of items, particularly art works, with the maker before deciding on acquisition.
  - c) The museum will document any copyright and intellectual rights, restrictions or permissions at the time of accessioning into the collection.

### **MODES Management System.**

- 1) Collections Management Systems and related applications were initially chosen to manage our preferred requirements. After much research and speaking with other small museums the Museum team selected software that supports both collections management systems and digital asset management systems, as well as systems that were compliant with Spectrum 5.0 procedures.
- 2) MODES was developed by the Museum Documentation Association (MDA) who released the first version in 1987. The MODES Users Association (MUA) was formed in 1996 to support the growing numbers of organisations using MODES. In 1997 the MUA became a not-for-profit company and acquired the Modes suite of programs.
- 3) The Trust selected MODES, which is a fully featured version of the MODES collections management system. It can be installed in single-user or multi-user (networked) configurations. MODES is Spectrum 5.0 compliant; it can validate and has a terminology control that is pre-defined, but can be configured by the user for index, output and reports.
- 4) MODES satisfies Object Entry (primary), Acquisition and Accessioning (primary) and Location and Movement Control (primary).

### **Museum Accreditation.**

- 1) The WSRHT is working towards museum accreditation. The museum is on two sites, one at Blue Anchor, the other being Bishops Lydeard, both sites are on the West Somerset Railway.
- 2) Accreditation means the museum complies with nationally agreed standards of good practice to ensure all museums are sustainable, focused and trusted, inspiring the confidence of the public, funding and governing bodies.

- 3) The scheme enables museums to assess their current performance, as well as supporting them to plan and develop their services. It covers three broad areas of museum activity: organisational health; collections; and users and their experiences.
- 4) The scheme is managed as a United Kingdom Partnership between Arts Council England, the Welsh Government, Museums Galleries Scotland and Northern Ireland Museums Council. It is run for museums and galleries of all sizes and types across the United Kingdom. The museum has submitted its application and has been informed that it has completed the first stage and is now working towards accreditation.
- 5) The Accreditation scheme sets out nationally agreed standards of good practice and enables museums to assess their current performance, as well as supporting them to plan and develop their services. It covers three broad areas of museum activity: organisational health; collections; and users and their experiences.
- 6) Supporting guidance for the Accreditation Scheme is also available from the Arts Council England. The four Accreditation partners are; Arts Council England, Museums Galleries Scotland, the Welsh Government and the Northern Ireland Museums Council – these are able to provide information and advice including additional support that may be available in each home nation.

#### **Themes and Priorities for Rationalisation and Disposal.**

- 1) The museum recognises that the principles on which priorities for rationalisation and disposal are determined will be through a formal review process that identifies which collections are included and excluded from the review. The outcome of review and any subsequent rationalisation will not reduce the quality or significance of the collection and will result in a more useable, well managed collection.
- 2) The procedures used will meet professional standards. The process will be documented, open and transparent. There will be clear communication with key stakeholders about the outcomes and the process. The museum's priority for rationalisation and disposal will continue to be those objects that have been formally reviewed through the implementation of its retrospective documentation plan.
- 3) The museum has previously undertaken active disposal following conclusion of this process. The completion of retrospective documentation in several areas including art, social history and world cultures has identified material of low quality, poor condition, and/or duplicate mass-produced articles which are being considered for disposal. This will also apply to the archaeology and natural history collections following the completion of retrospective documentation in these areas.
- 4) It is likely that archaeological material will be identified that should be disposed of to another institution which already cares for material from the same sites, and which will provide better care or access to users; or common natural history specimens in poor condition and lacking significant provenance may be identified, which will be considered for disposal.
- 5) Beyond rationalisation relating to the retrospective documentation plan, disposals will only be undertaken for legal, safety or care and conservation reasons (e.g., spoliation, infestation or repatriation).

#### **Legal and Ethical Framework for Acquisition and Disposal.**

- 1) The museum recognises its responsibility to work within the parameters of the Arts Council England code of ethics when considering acquisition and disposal.

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## **Museum Collections Care and Conservation.**

- 1) The plan sets out the actions required to implement the Care and Conservation Policy. It should be read in conjunction with the Forward Plan, Building Plan and Emergency Plan and any other plans affecting the collection and the museum buildings. The WSRHT is committed to delivering and maintaining a high level of care to its collections. The museum has access to conservation advice from the regional Conservation Development Officer (CDO) and refers all concerns to an appropriate conservator. For this reason, a consistent and regular monitoring programme is essential as a means of identifying and reporting potential threats to the collection, so that swift action can be taken to mitigate these.

## **Collecting Policies of other Museums.**

- 1) The museum will take account of the collecting policies of other museums and other organisations collecting in the same or related areas or subject fields. It will consult with these organisations where conflicts of interest may arise or to define areas of specialism, in order to avoid unnecessary duplication and waste of resources.

## **Museum Collections Care Policy.**

- 1) This policy is in accordance with the museum's Statement of Purpose and the Collections Development Policy. All staff (paid and volunteer) have read and agreed to abide by the policy. The Collections Care and Conservation Plan sets out the way the policy will be put into action and should be read in conjunction with the Forward Plan or Business Plan, the Emergency Plan, the Building Plan and any other plans affecting the collections and the museum buildings.

## **Collections Care Plan.**

- 1) This plan sets out the actions required to implement the Care and Conservation Policy. It should be read in conjunction with the Forward Plan, Building Plan and Emergency Plan and any other plans affecting the collection and the museum buildings.
- 2) The museum has access to, and will consult with, the regional Conservation Development Officer (CDO) for regular advice see: <https://southwestmuseums.org.uk/who-we-are/our-team/>
- 3) Any problems or concerns relating to the care of the collection are referred by the Curator to the CDO or another appropriately qualified conservator.

## **Collections Development Policy.**

- 1) The Museum Collections Development Policy will be reviewed from time to time, at least once every five years.
- 2) Arts Council England (once the museum has been accredited) will be notified of any changes to the collections development policy, and the implications of any such changes for the future of collections.
- 3) The Gauge and Blue Anchor Museum. The West Somerset Railway Heritage Trust have developed the strategy of 'one museum on two sites.'



## **Exceptions.**

- 1) Acting as an externally approved repository of last resort for material of local origin.
- 2) Acting with the permission of authorities with the requisite jurisdiction in the country of origin. In these cases, the museum will be open and transparent in the way it makes decisions and will act only with the express consent of an appropriate outside authority. The museum will provide the appropriate documentation if these exceptions ever occur.

## **Disposal Procedures.**

- 1) All disposals will be undertaken with reference to the Gauge, Blue Anchor Museum and the Trusts policies and procedures and in accordance with SPECTRUM 5 Primary Procedures on disposal.
- 2) The Trust will confirm that it is legally free to dispose of an item. Agreements on disposal made with donors will also be taken into account.
- 3) When disposal of a museum object is being considered, the museum will establish if it was acquired with the aid of an external funding organisation. In such cases, any conditions attached to the original grant will be followed. This may include repayment of the original grant and a proportion of the proceeds if the item is disposed of by sale.
- 4) When disposal is motivated by curatorial reasons the policies and procedures will be followed and the method of disposal may be by gift, sale, or as a last resort - destruction. The decision to dispose of material from the collections will be taken by the Trust only after full consideration of the reasons for disposal. Other factors including public benefit, the implications for the museum's collections, and collections held by museums and other organisations collecting the same material or in related fields will be considered. Expert advice will be obtained and the views of stakeholders such as donors, researchers, local and source communities and others served by the museum will also be sought.
- 5) Once a decision to dispose of material in the collection has been taken, priority will be given to retaining it within the public domain. It will therefore be offered in the first instance, by gift or sale, directly to other Accredited Museums likely to be interested in its acquisition. If the material is not acquired by any Accredited Museum to which it was offered as a gift or for sale, then the museum community at large will be advised of the intention to dispose of the material.
- 6) Any monies received by the Trust from the disposal of items will be applied solely and directly for the benefit of the collections. This normally means the purchase of further acquisitions. In exceptional cases, improvements relating to the care of collections in order to meet or exceed Accreditation requirements relating to the risk of damage to and deterioration of the collections may be justifiable. Any monies received in compensation for the damage, loss or destruction of items will be applied in the same way. Advice on those cases where the monies are intended to be used for the care of collections will be sought from the Arts Council England.
- 7) Full records will be kept of all decisions on disposals and the items involved and proper arrangements made for the preservation and/or transfer, as appropriate, of the documentation relating to the items concerned, including photographic records where practicable in accordance with Gauge Museum Policies and Procedures and with SPECTRUM 5 Procedure on de-accession and disposal.

## Policy Review.

- 1) The Museum Collections Development Policy will be reviewed from time to time, at least once every three years.
- 2) Arts Council England (once the museum has been accredited) will be notified of any changes to the Collections Development Policy, and the implications of any such changes for the future of collections.
- 3) The Gauge and Blue Anchor Museum. The West Somerset Railway Heritage Trust (WSRHT) is developing the strategy of one museum on two sites.

### DOCUMENT CONTROL

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0.1	August 2020	First Draft of Document.
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0.3	December 2022	WSRHT Trustees Approved. Next Revision December 2025

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