

The Friends of Chain Bridge Forge

Documentation Procedural Manual

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1. INTRODUCTION

This manual outlines all the procedures relating to documentation that will be followed by Directors, staff and volunteers of Chain Bridge Forge.

The eight procedures outlined reflect the eight SPECTRUM primary procedures required for Forge Accreditation. They are intended to be a clear set of guidelines to standardise documentation at the Forge. These procedures are:

- Object entry
- Acquisition
- Labelling and marking
- Loans in
- Loans out
- Cataloguing
- Location and movement control
- Object exit.

Each section contains an explanation of the purpose of the procedure; whose responsibility it is; and detailed instructions for following the procedure.

This manual was compiled in July 2012 on behalf of the Directors of the Forge (the Directors), who have overall responsibility for documentation and the regular revision of all procedures contained in this manual.

2. OBJECT ENTRY

The purpose of the object entry procedure is to:

- identify uniquely the newly received item
- ensure the Forge can account for all objects in its care
- provide a receipt to the owner or depositor
- establish terms and conditions for deposit and the Forge's liability
- establish who has legal title to the object
- capture key information about the object and its history.

Any Directors, member of staff or volunteer of the Forge taking an object into the care of the Forge, whether as a donation, sale, loan, or for any other reason, is responsible for following this procedure.

All Staff are expected to take the same care of all the objects lodged with them, whether they form part of the permanent collections or belong to someone else.

An entry form must be completed for each object that enters the care of the Forge even if an object is going to be in the care of the Forge for a short time.

Where a group of objects are received from a single depositor/donor, then a single form may be used. Where a group of objects has different depositors/owners, a different form must be used for each depositor/owner.

Completing the object entry form

There is a sample of the object entry form at the end of this section. Forms are kept at the Forge and in the Forge Office. If an object is collected from a depositor away from the Forge, where possible an entry form should be taken and filled in at the time of collection, or otherwise a form should be sent to the depositor within 5 days of deposit.

1. Fill in the following fields:
 - Entry number: the next consecutive entry number.
 - The depositor's full name, address and telephone number.
 - The name and address of the owner, if this is different.
 - A full description of the object including its history, condition and origins. Find out as much as you can about the object at this stage. Check that any documentation accompanying the object corresponds with the item itself.
 - The number of items deposited.
 - Reason for entry: tick the appropriate option (donation, sale, or loan). Get the depositor to sign.
 - Title or copyright agreement: tick the appropriate option. Get the depositor to sign (you may need to use the copyright licence form as well).
 - Sign and date the form on behalf of the Forge.
 - Photocopy the form (2 copies). Pass the original to the Forge Office and give a copy to the depositor as a receipt. Keep the second copy with the object in a secure place. (Incoming objects should be kept separate from the rest of the collection until they have been assessed for pest and other damage.)

2. Things to tell the depositor:

- Accepting the deposit does not necessarily mean the Forge will accept the item(s) permanently. This will be decided by the Forge Curator on behalf of the Directors.
 - We cannot guarantee that the item will be put on display.
 - They will receive confirmation within 1 month of whether the Forge intends to accept the donation into the collection.
 - The conditions of deposit are on the reverse of the entry form.
 - In the case of purchases or gifts, ownership will pass to the Forge.
 - The Forge does not give valuations on items offered for donation or sale.
3. Pass the object to the Curator for a decision on whether it will be accepted into the collections. The Curator will contact the depositor and inform them of a decision.
4. If an object is donated or left anonymously follow the entry procedure as fully as you can. Make a note on the form that the item was left anonymously. If the object is not to be accepted in to the collection, the Forge will keep the object for a minimum of eight weeks in case ownership can be established. After this time the object may be disposed of.

Returning items

The Directors are responsible for ensuring that items deposited on loan are returned to the depositor. When an item is ready for collection, the Curator will contact the depositor by telephone. If the depositor cannot be reached, the Curator will send a letter indicating that if the object is not collected it will be disposed of in two months.

When collecting the item, the depositor will need to sign the entry form to acknowledge return of the item. Once the item has been returned the form should be placed on file in the Forge Office.

If the depositor does not collect the object, a letter will be sent advising the depositor that their item is available for collection and that if it is not collected within 3 months the item may be disposed of at the Forge's discretion. The Curator will take a final decision as to whether an uncollected item will be disposed of.

Sample object entry form

3. ACQUISITION

Acquisition is the process by which objects are formally taken into the Forge's collection. The accession record created by this procedure will be the official record of all objects held in the Forge's collections. Accession records enable the Forge to:

- establish accountability for objects
- establish the identity of objects
- confirm ownership of objects.

The Curator, or delegated member of staff or volunteer, should follow this procedure when accepting an object into the Forge's collections.

The accession record is entered in the accession register which is held in the safe in the Forge Office. This procedure will be followed a maximum of 1 month after object entry, and after the decision to formally take an object into the Forge's care.

Entering the object in the accession register

1. Ensure that the details on the object entry form match the object and are accurate.
2. Make an entry for the object in the accession register as follows:
 - Entry number: copy from object entry form.
 - Accession number: use a new, unique accession number for each item*. Chain Bridge Forge accession numbers follow the format BF 2012.1, CBF 2012.2 etc.
 - Date acquired: the date the item was acquired by the Forge (this may not be known).
 - Acquired from: the name and address of the previous owner (ie the donor, or vendor).
 - Acquisition method: eg gift, purchase, bequest, transfer or exchange).
 - Simple name etc: the object name and a short description, enough to identify each item. Keep the historical information brief as more detailed information will be recorded in the catalogue, but do include information about the condition of the item.
 - Notes: use this for any explanations that are required or to record actions at a later date (for example disposal of an item).

* Large numbers of similar objects that are physically grouped together (for example a box of buttons) can be numbered as one object. Check the Collections Link advice sheet on bulk accessioning for further information.

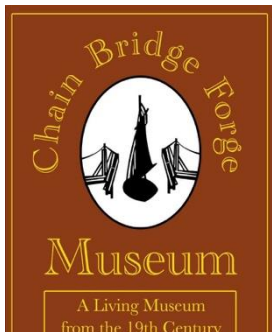
3. Once the entry is completed, the accession register should be returned to the Forge Office safe. It should only be handled to make new entries or during auditing.
4. Copies of letters of thanks should be filed in accession number order, together with the third copy of the object entry form and any other paperwork (orders, receipts etc.) in the Object History File.

Once a year, a copy of all new accessions in the register should be added to the duplicate copy of the accession register held by South Holland District Council.

Example of an Accession Register Page

Letters of acknowledgement

The Curator will send a letter of acknowledgement or thanks to donors when items are either accepted or declined.



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<http://chainbridgeforge.sholland.org/>

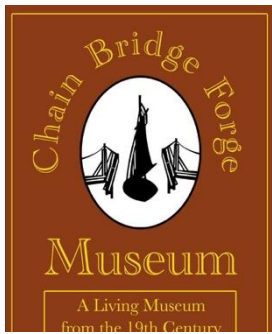
[Date]

Dear

We are very pleased to accept the you kindly offered to donate to the museum. We feel that it will complement / enhance the museum's collection and will add significantly to our resources.

We appreciate your thoughtfulness and generosity in making this item available to the museum. Items such as this make the collection more comprehensive and ensure that future generations will benefit from a greater understanding and enjoyment of Chain Bridge Forge's past.

Yours sincerely



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4. LABELLING AND MARKING

Each object that is accessioned into the Forge's collections must be marked with its unique accession number. This will usually be a physical mark on the object itself.

If the object itself cannot be marked, a label can be used. Marks or labels must be:

- Secure: the chances of accidental removal must be extremely low.
- Reversible: it should be possible to intentionally remove a mark or label with as little trace as possible, even after a considerable period of time.
- Safe for the object: neither materials nor methods used should risk significant damage to the object.
- Discreet but visible: you should not spoil the appearance of the object or obscure important detail. However, the number should be visible enough to reduce the need to handle the object.
- Convenient and safe: materials should be easily available in small quantities at a reasonable price and should not pose significant risks to health if used within CoSHH guidelines.

Archival quality materials will be used for labelling and marking.

This procedure should be followed by any appropriately trained Directors, member of staff or volunteer who is marking or labelling objects when an object is accessioned into the Forge's collections.

Health & Safety literature for labelling and marking should be consulted and appropriate precautions put in place before this procedure is undertaken.

Labelling and marking objects

1. The labelling and marking equipment is kept in the Forge Office.
2. Carry out labelling and marking in an area that is free of clutter, and, if necessary, well ventilated.
3. Use the method that is most appropriate to the material being marked:
 - Metal and wood - use the varnished drawing ink on a basecoat technique
 - Textiles/clothes - use sewn on labels
 - Small items - use tie-on archival quality Tyvek labels
 - Paper materials - use a good quality 2B pencil

For leather, mark metal attachments using the technique described under 'metal and wood'.

4. For more detailed guidance, refer to the Collections Directors 'Labelling and Marking Forge Objects' booklet which is kept with the labelling and marking equipment.

5. LOANS IN

Objects may be borrowed to enhance Forge displays where gaps exist in the Forge's collection. Loans must be relevant to the display and add to the interpretation of the subject of the display.

This procedure should be followed by the Directors or the Curator under delegated authority when planning, negotiating, or accepting the loan of any object from another Forge, institution or individual. As part of this process they will establish that the lender has legal title to the objects being requested.

Requesting and agreeing loans

1. Formal loan requests should be made in writing.
2. The loan request will include:
 - Date and venue for the loan
 - The reason for the loan (e.g. for exhibition)
 - The lender's details
 - A statement of insurance and indemnity arrangements.

The lender may require additional details.

3. Prepare for the arrival of the loan item by briefing staff and volunteers, implementing any requirements specified by the lender, and identifying a location for the item on its arrival.
4. When the lender has agreed in principle to the loan, prepare a record for each item. This will be made on a standard loan agreement form. (The usual protocol is for the borrower to accept the standard agreement of the lender, providing all relevant points are covered. If necessary, draft a one-off agreement that covers everything to the satisfaction of both parties.)

Completing the loan agreement

1. The loan agreement consists of a detailed contract and loan agreement form. The form records the details of each item and conditions for its use, including:

- Lender's accession number and object description
 - Owner details
 - Valuation
 - Condition
 - Display requirements
 - Environmental requirements
 - Handling requirements
 - A note of copyright and reproduction rights, where possible
 - A photograph, if possible.
2. The contract contains detailed terms and conditions for the loan (which may include several items), including:
- Confirmation that the lender is, or is acting on behalf of, the legal owners of the loan items
 - Duration of the loan. (For longer term loans it may also be necessary to agree the intervals at which confirmation of the loan is required.)
 - Costs and responsibilities of each party
 - Care and display requirements
 - Insurance and indemnity requirements
 - Terms of reproduction and intellectual property rights
 - Renewal of loan application date.
3. Give each loan in a number using the same format as for accessioned items but with the addition of a number indicating the number of months of loan.
4. Keep all correspondence and paperwork relating to the loan in the loans in section of the loans file which is held in the Forge Office.

Receiving the objects

1. When receiving objects on loan complete an object entry form. Use the loan number as the entry number. Keep a copy of the entry form in the loans in section of the loans file.
2. Make a condition report. Include a photograph if possible.
3. Take any remedial action as required, after obtaining the lender's agreement.
4. If possible, attach a removable tag with the loan number to the object. Make a note of the location of the object within the Forge.
5. Send a receipt to the lender to confirm safe arrival of the object. Retain a copy.

Monitoring the loan

1. The Curator, on behalf of the Directors, will be responsible for monitoring the loan. This includes:
 - monitoring the condition of the object
 - monitoring the environment within which the object is displayed
 - reporting any changes in circumstances, even if the object on loan is not directly affected.

Returning or renewing the loan

1. The Curator, on behalf of the Directors, will be responsible for returning or renewing the loan. For renewals, insurance or indemnity cover will need to be revised.
2. Use the object exit procedure for returning loans. File a copy of the exit form in the loans file. Confirm packing and transport arrangements as previously agreed. Make sure a condition report of the object, with photograph if possible, is made as it leaves the Forge's care.
3. Obtain a receipt, and written confirmation that the object has been received in a satisfactory state. Take any necessary follow-up action. Confirm that all charges have been paid and keep the documentation as a permanent record of the loan.
4. Make every effort to return the loan item to the lender at the end of the loan period. If, after extensive efforts, the original lender cannot be contacted then the object may be accessioned into the Forge's collection or disposed of in accordance with the Forge's disposal procedures.

6. LOANS OUT

This is the process of lending items for a specific time and a specific purpose. Objects are normally loaned for display purposes, but could also be loaned for research, education and photography. Borrowers may include other Forges, educational or research institutions.

This procedure should be followed by the Curator, on behalf of the Directors. The Curator is authorised to negotiate all loans and agree the terms and conditions of the loan.

Short-term loans will be for a maximum period of 1 year and long-term loans for inclusion in permanent displays will be for a maximum period of 5 years. Extensions to the loan period may be negotiated, but this will only occur in exceptional circumstances.

Requests for loans

1. Formal loan requests will only be accepted in writing following preliminary discussions. Requests should contain the following information:
 - Details of the requested objects
 - Details of the borrowing organisation and the person making the request.
 - A brief statement of insurance provisions.
2. The Forge will acknowledge the request, stating whether the loan will be agreed or not. Criteria to consider when making the decision include:
 - The availability and condition of the object
 - A risk assessment for the object including the borrower's site
 - Ethical considerations concerning the loan and the acceptability of the reason for borrowing
 - Whether the objects will be lent to third parties
 - Whether the Forge has the right to lend objects (e.g. objects that are not owned by the Forge)
 - The history of previous borrowing
 - Assurance of adequate cover in the event of loss or damage
 - The ability to meet timescales
 - Any specific requirements relating to the object.

Agreeing loans

1. All correspondence, paperwork etc relating to the loan will be kept in the loans file which is held in the Forge Office.
2. All loans will be recorded using a standard loan agreement. Each loan out will be given a number using the format as for accessions.
3. The borrower will be supplied with the following information:

- Valuation and condition of objects
 - Handling display and environmental requirements of the object
 - A photograph and dimensions of the objects
 - The estimated costs the borrower is expected to meet
 - Any other information required by the borrower and agreed to by the Forge.
4. Finalise the conditions of the loan and make a record of the agreement in the loans file. This final agreement should include:
- Insurance and indemnity requirements
 - Terms for any reproduction
 - Packing and transport requirements
 - Any special conditions (e.g. acknowledgements)

The agreement must be signed by both parties.

Dispatching the loan

1. Carry out a condition check and photograph the objects.
2. Pack the objects suitably.
3. Follow the procedure for 'object exit' - see below.
4. File the blue copy of the exit form in the loans out section of the loans file.
5. Update the location record - see below.

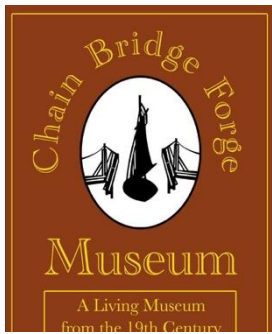
Monitoring the loan

1. The Curator, on behalf of the Directors, is responsible for monitoring the loan. This includes:
 - Ensuring the loan agreement is renewed if necessary
 - Ensuring that the object is returned at the end of the loan period
 - Monitoring the condition of the object
 - Monitoring the environment within which the object is displayed.

Renewal or return of the loan

1. Before the end of the loan, either arrange an extension to the loan or the return of the loan.
2. On return of the objects, unpack them and check their condition.
3. Take any remedial action or make any indemnity claims as necessary.
4. Claim any outstanding costs.

5. Record the completion of the loan in the loans out record.
6. Sign and date the final section of the exit form to acknowledge the return of the object (see 'object exit' below) and return the blue copy to the loans file.
7. Update the location record - see below.



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DOCUMENTATION PROCEDURAL MANUAL

OBJECT ENTRY FORM

ENTRY NO. _____

RECEIVED FROM Address _____ Tel No. _____	OWNER (if different) Address _____ Tel No. _____
DESCRIPTIONS OF OBJECT(S). Any related information such as when, where or how found or used, names, dates and details of the people who made or previously owned it etc. Note any damage. (Continue on a new sheet if necessary) <div style="text-align: right;">Total No of Items _____</div>	
REASON FOR ENTRY (tick as applicable and sign) <input type="checkbox"/> Donation – I wish to give the object(s) listed above to the museum's governing body without condition. <input type="checkbox"/> Sale – I offer to sell the object(s) listed above to the museum's governing body. Price sought £ _____ <input type="checkbox"/> Loan – I offer to loan the object(s) listed above for the use of the museum's governing body for a period of _____ months. I confirm that the information given on this form is correct to the best of my knowledge. Signed _____ Date _____	
ADDITIONAL AGREEMENT (DONATIONS/SALES ONLY) (tick as applicable and sign) <input type="checkbox"/> I, the owner, confirm that I have undisputed title to the object(s) listed above with full power to dispose of the items and transfer such title to the museum's governing body without condition. Or: <input type="checkbox"/> I, the depositor acting on behalf of the owner(s), confirm that the owner(s) have undisputed title to the object(s) listed above, with power to dispose of the items and transfer such title to the museum's governing body, and that I am authorised by the owner(s) to act on their behalf to that effect. Or: <input type="checkbox"/> I grant copyright and reproduction licence to the museum (terms and conditions to be agreed and recorded on a separate form) Or: <input type="checkbox"/> Copyright unknown <input type="checkbox"/> Copyright not held by donor.	

Commercial in Confidence

The title in the object(s) listed above is hereby transferred to the governing body of the museum.

Signed _____ Date _____

MUSEUM SIGNATORY

Receipt of the object(s) described above is hereby acknowledged.

Signed _____ on behalf of the Museum Trust _____

RETURN OF OBJECT TO OWNER (tick as applicable and sign)

I, the depositor / owner, acknowledge the return of the object(s) described above in a satisfactory condition following:

☐

The end of the period of loan

☐

The museum's governing body deciding to accept the donation, loan or purchase of the object(s)

Signed _____ Countersigned (for museum) _____ Date _____

Photocopy this form – Original to Museum Office – 1 copy to Depositor / Owner (Receipt) – 1 copy Museum (to accompany object(s))

7. CATALOGUING

Cataloguing is the assembling of all the key information about each item in the Forge's collection. It enables:

- Storage of information - the catalogue brings together and keeps securely information about each item in the collection
- Accessibility of information - the catalogue structures this information so that it can be searched easily and reliably.

A catalogue record brings together information resulting from other procedures and contains all the primary information known about each object. There is one record for each object that serves as the master record for that item.

This procedure should be followed by the Curator, Directors, member of staff or volunteer with responsibility for cataloguing. Items should be catalogued as soon as possible after accessioning.

The system that is used by the Forge is Ehive; the records can be accessed by text search or by the following indexes:

- Classification
- Current location
- Dates – made/associated
- Events – associated
- Materials
- Method of acquisition
- Object name – other
- Object name – simple
- People – acquired from
- People – makers/associated
- Places – made/associated
- Title.

Guidelines for cataloguing items

Name of object

Archive number

Brief Description

Accession date

Place of Origin

8. LOCATION AND MOVEMENT CONTROL

Location and movement control provides a record of the current and past locations of all the objects in the Forge's care.

Location records can be accessed by accession number or location. Each record contains a note of the object's accession number, a brief description, the old and new location, the person that moved the object and the reason for the move. The records will be retained and filed as part of the object's history.

This procedure should be followed by anyone moving an object from its normal location for longer than one day. Objects must not be left unattended outside normal working hours without updating the location.

Recording locations

Use the following system to record locations:

- SS Shoeing Shed
- F Forge
- CR Community Room
- O Office

9. OBJECT EXIT

Object exit is the logging of any object from the Forge collection that leaves the Forge premises. It applies to loans out, temporary or permanent transfers and disposals.

This procedure ensures that a record is kept of the location of all accessioned objects in the Forge's care, and that relevant signatures are received when objects leave the care of the Forge.

Returns of unwanted items are covered by the object entry procedure.

Any Directors, member of staff or volunteer of the Forge arranging for an object to leave the Forge is responsible for following this procedure.

Completing the form

There is a sample of the object exit form at the end of this section. Forms are kept in the Forge Office and must be completed in archival ink. If an object is collected from a depositor away from the Forge, where possible take an entry form and fill it in at the time of collection. Otherwise send a form to the depositor within 5 days of deposit.

1. Record the following information on the form:

- The exit number. This should take the format **EXAMPLE**
- The remover's name, address and telephone number
- The recipient's name, address and telephone number, if different
- List of the items taken with identity number, brief description, condition and insurance valuation. Make a note of any loose parts
- The reason for removal
- If a loan out, the loan agreement reference number.

2. Sign and date the form on behalf of the Forge and obtain the remover's signature.

What to do with the completed forms

1. File the white copy of the form in the object exit file in exit number order. When the object(s) have been returned, sign the form and leave it filed in exit number order.
2. Give the yellow copy to the recipient. If the item(s) are being collected by a carrier give them both the yellow and blue copies. The recipient should then sign and return the yellow copy and keep the blue copy for their records.
3. For loans out, file the blue copy in the loans out file. If it is not a loan, file the blue copy in the object's history file or dispose of it.
4. For all other types of exit, file the yellow copy in the archive exit forms file.

Object returns

1. Sign the final section of the white copy of the Object Exit Form.
2. Locate the blue copy of the form in the loans out file and sign the final section.
3. Amend the location record.

Example of an Object Exit form

Details of the Forges documentation backlog can be found in the Documentation Plan, a copy of which is appended to this manual. This details the action the Forge need to take to resolve its documentation backlog by **DATE**.

A History of our Documentation System

If, at any time in the past, the Forge has used a documentation system other than that used at present, details should be inserted here. This may include changes in numbering systems, previous accession registers, transfer of paper-based records to computer etc.

The lettering "CBF" has been added to original numbering system.