

# Acquisitions Policy

This draft policy has been developed in discussion with the Society's Collections Advisory Group. It should be read in conjunction with the proposed Collections Development Plan and the existing Disposals Policy.

The Society's acquisitions policy is developed in the context of the Designated Status awarded to the Collections by the Arts Council and its predecessor bodies, and the priorities outlined in its Collections Development Plan.

A draft version of the proposed Acquisitions Assessment Form is provided in Appendix A.

This policy covers all acquisitions except those accessioned through routine donation, such as maps occasionally distributed from government departments, or through purchase from the annual library budget such as books and periodical subscriptions.

## **POLICY**

1. The Society recognises its responsibility to ensure that care of collections, documentation arrangements and use of collections will be meet the standards of the heritage sector as reflected in the guidance of the UK's Collections Trust. This includes using SPECTRUM primary procedures for Collections Management.
2. Items will be considered for acquisition by the Society in any of the following ways:
  - a. purchase (including direct or indirect purchase at auction sale)
  - b. gift (including transfer from other public or private bodies)
  - c. bequest
3. The Society will give due consideration to constraints on its ability to collect, including staffing resource, available storage space and costs of re-housing, care of collection factors (including condition and material) and the need for clarity on ownership and IPR.
4. The Society will take account of the collecting policies of other libraries, museums, and organisations in the same or related areas or subject fields. The Society will consult with these organisations where conflicts of interest may arise or to define unnecessary duplication and waste of resources.
5. Wherever possible items will be acquired without conditions; only under exceptional circumstances will items be accepted with conditions attached.
6. All efforts will be made to ensure Intellectual Property Rights are acquired along with the item. Where this is otherwise it will be made explicit and reflected in the acquisition documentation.
7. Loans to the Society are not acquisitions and are dealt with under separate individual agreements pertaining to the display of items linked to Society exhibitions.
8. The Society will work within the guidelines established by the Museums Association Code of Ethics for Museums.
9. Concerning archives, photographs and printed ephemera, the Society will be guided by the Code of Practice on Archives for Museums and Galleries in the United Kingdom (3rd ed., 2002).
10. The Society will not acquire, whether by purchase, gift, bequest or exchange, any item unless it is satisfied that the Society can acquire a valid title to the item in question.

11. In cases where an item has been acquired in good faith and on the basis of statements of ownership or provenance provided by the donor or seller, but where evidence arises that the item has in fact been purchased without valid title, the Society shall refer to the guidance and best practice recommend by the National Museums Directors Council.

12. In particular, the Society will not acquire any item unless satisfied that the item has not been acquired in, or exported from, its country of origin (or any intermediate country in which it may have been legally owned) in violation of that country's laws. (For the purposes of this paragraph 'country of origin' includes the United Kingdom).

13. In accordance with the provisions of the UNESCO 1970 Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, which the UK ratified with effect from November 1 2002, and the Dealing in Cultural Objects (Offences) Act 2003, the Society will reject any items that have been illicitly traded. The Society, as holding a Collection of designated status will be guided by the national guidance on the responsible acquisition of cultural property issued by DCMS in 2005.

14. So far as biological and geological material is concerned, the Society will not acquire by any direct or indirect means any specimen that has been collected, sold or otherwise transferred in contravention of any national or international wildlife protection or natural history conservation law or treaty of the United Kingdom or any other country, except with the express consent of an appropriate outside authority.

15. Acquisitions outside the current policy will only be made in exceptional circumstances, and then only after proper consideration by the Society's CAG.

16. A detailed written record of each proposed acquisition will be kept (see Appendix A).

17. The accessioning of the item(s) will be documented in the Collections Management records of the Society.

18. A list of confirmed accessions will be circulated to the CAG as part of its routine business.

19. Where applicable on transfer to the Society, a Transfer of Title document will be prepared by the Society and signed by both parties.

20. Decisions on the acceptance of items into the Collections will be taken on behalf of the Trustees of the Society by the Director and the Head of Collections (or where that role is vacant, the Director or the Director's nominee), advised by the CAG.

21. Exceptions to this delegation of authority exist for items of high value or particular sensitivity, in which case the Society's Trustees will be directly involved.

22. For all acquisition items deemed sensitive or significant by the CAG (for example, if a public appeal is required), irrespective of financial value, authority to acquire rests with the Trustees of Council, advised by the Director and the Executive.

23. The Society will discriminate carefully in selecting items to be acquired and will apply the same criteria to all acquisitions, whatever their size, value and the method of acquisition.

24. Several factors must be considered during the acquisition process before a final decision is made. These include:

- Its importance to the discipline of geography
- Its potential to enhance or extend the Society's existing holdings
- its potential uses in research, education and public engagement
- Its national or international importance, including its uniqueness or rarity
- Its ownership and documentation
- Its costs in terms of staff, space and financial resources required to catalogue, conserve, store and make available the item or collection

25. For each potential acquisition, the most appropriate specialist within the Collections team will be identified on the basis of the item type and their expertise, with guidance and support from the Head of Collections (or where that role is vacant, the Director or the Director's nominee) and Principal Librarian, as appropriate.

26. The Collections team member will be responsible for developing a robust and accountable case on the acquisition proposal form (Appendix A).

27. All proposals will be assessed using a scoring scale, as follows:

**Acquisitions Scoring Scale:**

- 0 Out of scope for current CDP.
- 1 Minimal relevance or importance to the enhancement or development of an existing collection.
- 2 Partially relevant or important to the enhancement or further development of an existing collection.
- 3 Fully relevant or important to the enhancement or development of an existing collection.
- 4 Exceptionally relevant and important to the enhancement or development of an existing collection.
- 5 Of priority relevance and critical importance to the enhancement or development of an existing collection.

28. The Head of Collections (or where that role is vacant, the Director or the Director's nominee) or the Principal Librarian will present the case for each acquisition to the CAG, covering all questions asked in the acquisition proposal form.

29. Additional information on preservation, documentation and storage is included on the acquisition proposal form and presented in conjunction with the case for acquisition.

30. If approved, the full justification for each acquisition proposal will be recorded in the Minutes of the CAG and reported reported to the Society's Trustees by the Society's Director.

31. If an item's value is in excess of £100,000, or the item is deemed particularly sensitive, the CAG are required to seek the prior guidance of the Society's Trustees.

32. If In cases of complex acquisition (for example, one requiring a grant application for funding) an internal acquisition leader will be identified to keep track of progress. Relevant Development and Communications colleagues will then be closely involved at all stages. The Society's Executive and Board of Trustees will be involved and updated appropriately.

33. This Acquisitions Policy will be subject to review by CAG at least every five years. Any changes proposed will require the agreement of Council.

*Approved by CAG, May 2023*



**Appendix A**

**ACQUISITIONS ASSESSMENT FORM (to be formatted)**

**Date:**

**Staff Member Responsible:**

**Solicited or Unsolicited Approach:**

**Donor Details** (including status, where relevant in relation to the potential donation, relationship to previous owners, family, executor, etc):

**Title:**

**Name:**

**Address:**

**Contact details:**

**Collections Development Plan:**

Does the Item meet the Society's CDP and Acquisitions Policy: YES/NO

**Interpretative, Research, Education and Exhibition Potential:**

Please outline how the Item will be used to meet the Society's objectives in interpretation, research, education, and exhibition-related work, including its relationship to the Society's strategic priorities:

**ITEM DESCRIPTION**

Maker/Originator/Creator:

Place of manufacture or creation (if known):

Date of creation (actual or date range):

Dimensions:

Materials:

Acquisitions Score:

Significance of item(s):

Relevance to existing Collections' strengths, including complementarity with other items already in the Collections:

Representativeness (of a particular category of object, activity or geographical theme or focus):

Rarity (rare, unusual, or fine example of its type):

Condition: (usually complete or in sound condition):

Outline any remedial work required prior to the acceptance of the Item, including any costs that may be incurred and confirm whether this can be covered within existing budgets:

IP/copyright status



**Value:**

Has the donor provided an outline financial value for the Item? Please outline the form of the valuation received:

If not, can the Society estimate value based on existing recent valuation reports on file?

If not, can the Society obtain a valuation from our nominated valuers in order to ensure that the value of the Item falls within our current Collections insurance cover:

**Tax:**

Is the donation of the Item free from any financial taxation, such as inheritance tax or other financial charge, including import or export duties (if the donation is made from outside the UK)?

**Storage Requirements**

Describe Packaging (is the donation presented in original protective outer, binding, etc., is the donation packaging integral to the donation and to be accessioned with the item(s):

Is existing space sufficient for storage of items, or would new space have to be found?

Can the costs of packaging materials require for storage of the acquisition be covered from within departmental/staff resource? YES/NO

If no, please provide an estimate of the costs of storage materials required to house the acquisition and whether or not the donor is potentially willing to consider covering these costs as part of the donation:

**Cataloguing**

Please indicate whether the items have been catalogued and if so at what level; and if not, what resources (staff time, funding) would be required to complete this.

**Digital Transfer**

Please assess the costs of digitisation for the materials and whether this can be carried out with existing staff resource.

Please indicate whether there are any likely costs in rights clearance on digitisation.

Please confirm whether the donor is potentially willing to consider covering these as part of the donation.

**Additional Points**

(Please outline any other information relating to the potential donation):