DOWN TO THE NITTY-GRITTY: A CASE STUDY OF COLLECTION POLICIES AND PROCEDURES IN THE ETHNOLOGY DEPARTMENT AT THE SAM NOBLE OKLAHOMA MUSEUM OF NATURAL HISTORY

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Abstract.—Although most museum professionals understand the differences between a Collection Management Policy (CMP) and collection procedures, many find it difficult to create, update, and implement these different documents. The creation of a procedural manual for the Ethnology Department at the Sam Noble Oklahoma Museum of Natural History (SNOMNH) at the University of Oklahoma and an update of SNOMNH's CMP led to an examination of the differences between policies and procedures, the varying processes of creating and/or updating these different documents, the difficulties of policy/procedure implementation, and the ultimate necessity of both types of documents.

Key words.—Collection Management Policy, Policies, Procedures, Procedural Manual

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Introduction

Although vital to the operations of any collecting institution, a Collection Management Policy (CMP) presents only the basics of each collection management topic. Rarely does it delve into the real nitty-gritty of collection management specifics, which is the primary purpose of the often-neglected collection management procedures document. This article explores the differences between collections management policies and procedures, and emphasizes the strengths of both documents by examining the processes involved in creating a procedural manual for the Ethnology Department at the Sam Noble Oklahoma Museum of Natural History (SNOMNH) at the University of Oklahoma and updating the SNOMNH's Collection Management Policy (CMP). These examples demonstrate the importance of collection procedures to appropriately implement and adhere to any museum's CMP.

The Collection Management Policy

A Collections Management Policy (CMP) is a detailed document that articulates the overall outlook, approaches, and professional standards adopted by a museum or collecting institution. It explains why a museum exists and how it cares for the objects it preserves (Malaro 2012). The CMP is often considered "the bible" for most museums. A good CMP will detail an institution's mission statement, the scope of collections, criteria for activities such as acquisitions, accessioning, deaccessioning, and disposal of objects, and statements of ethics such as policies on appraisals or sale of objects as well as other items including insurance coverage and loans. The CMP provides a guide for museum staff, outlines what these professionals are legally mandated to do, and details who within the museum has the authority to engage in different activities. Museums can utilize a CMP to illustrate to other museums and to various stakeholders, including the public, that they are maintaining the highest levels of ethical, legal, and professional standards. Therefore, most museums have made an effort to write a thorough CMP for their institution. In some cases, the CMP is used in conjunction with other policy statements

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and documents, such as special events policies that restrict the use of live plants or the consumption of food in galleries and exhibit spaces. These additional policy documents often provide even more detailed information on how a museum approaches good collections stewardship. Organizations such as the American Alliance of Museums and the Society for the Preservation of Natural History Collections, among numerous other professional organizations, provide sound resources designed to aid in the creation of policies aligned with museum best practices. Other relevant literature (e.g. Buck and Gilmore 1998, Malaro 2012, Simmons 2006) can also assist in the process of writing a comprehensive CMP.

SNOMNH's CMP Update

The SNOMNH first wrote a detailed CMP in 1984, bringing the institution in line with the practices of other museums across the country. As policies, laws, and professional standards change, this document undergoes periodic review and update. An update was completed on the SNOMNH's CMP in 2002, but as of 2014, the administration decided that the document needed to be updated again to reflect a more detailed and thorough description of the Museum's current policies and how they align with professional best practices. A CMP Committee (hereafter referred to as "Committee") was tasked with reviewing the CMP and making recommendations and edits for the most recent update. The Committee was interdisciplinary in nature, composed of the Museum's Registrar and one collection representative from each of the SNOMNH's major divisions: biological sciences, earth sciences, and social sciences. The Committee's composition was reflective of the interdisciplinary nature of the Museum's diverse collections, so that no matter their discipline, each collection would have an advocate on the Committee familiar with their area of expertise. The Registrar served as the chair of the Committee, representing the legal responsibilities of the Museum and ensuring consistency throughout the process.

The goals for the 2014–2015 update process for the CMP were to (1) reflect the Museum's compliance with new and updated state, national, and international laws and other legal mandates; (2) illustrate the Museum's awareness of and continued compliance with the best practices of numerous national and international professional organizations such as the American Alliance of Museums; (3) respond to the ever-evolving nature of museum ethics and reflect the Museum's stance on sensitive issues such as the humane treatment of live animals and the collecting of ancient art and archaeological materials; and (4) include sections that were missing from previous versions of the CMP such as a section on repository agreements and a section on unclaimed (i.e., abandoned) property.

To determine what needed to be changed, updated, or added, the Committee first engaged in a preliminary planning session where the members reviewed other examples of CMPs from natural history museums of comparable scale and collections holdings and commented on what, in their opinions, worked well, what did not work well, and which areas could be used as models during the revision process. After engaging in this exercise, each Committee member reviewed the SNOMNH's prior version (the 2002 update) of the CMP and arrived at the next meeting ready with detailed and specific comments. After first attempting to dive into the entire document all at once and address each member's diverse comments in one meeting, it was determined that this process was both impractical and confusing. Further discussion ensued as to a better approach for addressing the multitude of concerns and issues brought up by each Committee member. The CMP was then subdivided into small discrete sections based on natural divisions of topics (or in some cases, subtopics), with a schedule to keep track of which individual section the Committee would tackle each meeting and what each member was responsible for completing between meetings. All Committee-related documents, including working documents, schedules, and source material, were stored in a restricted Google Drive folder, which allowed for ease of access by all Committee members from any computer.

After this basic organizational structure was implemented, the actual work of the Committee progressed much more smoothly. The Committee met regularly once every two weeks, depending on schedules. At each meeting, members focused on one section or subsection of the CMP. Having reviewed and commented on the assigned section prior to the meeting, the chair of the Committee combined all of the comments (which were tracked via the track changes feature in a Microsoft Word document) into a single document for ease of discussion. At each meeting, one Committee member was assigned the task of live updating the relevant working document as the discussion progressed while another member was assigned the job of updating a spreadsheet of tasks that needed to be completed before the next meeting, such as additional research or communicating with specific Museum staff, as well as who volunteered to complete each task. The Committee regularly sought additional input from other collections staff including the Head Curator, Curators, and Collection Managers, as well as other Museum departments including Education, the Volunteer Office, Information Technology, Human Resources, and Finance. Appropriate division of labor was vital to the success of each meeting, and deadlines for edits and comments for each section were closely maintained to hold everyone accountable. Breaking up the CMP into smaller sections made the process much more manageable as well as making it easier to integrate the work of the Committee into the already busy schedules of each member.

The Committee decided that the document should be static in nature, with major revisions occurring infrequently. Instead, the document appendices would be updated regularly to reflect procedural and minor policy changes affecting all of the collecting departments. Changes affecting only individual departments would be referenced in each department's procedures. It was the Committee's responsibility to work together to determine what would be best for the Museum as a whole as well as what would work best for all of the collection departments collectively. This was sometimes a challenge because it was quickly determined during the revision process that different collection departments approached various issues quite differently. They utilized their objects or specimens in very different ways, interacted with outside institutions differently, and even used different terms to refer to similar concepts or things. For example, the Herpetology Department utilized the term "research collection" to refer to their permanent collections while the Ethnology Department employed the same term to refer to their nonaccessioned reference collection. Also, staff often did not seem to know what the category "reproduction" included, which encompasses everything from a plaster cast of a Greek sculpture to a 3-D printing of a paleontology specimen and a digital copy of a Kiowa interview from the Native American Languages collection. The ensuing confusion resulted in a much-needed but unanticipated standardization of the Museum's internal nomenclature. An expanded definition section at the beginning of the CMP was created to clarify numerous terms.

Another unintended consequence of updating the CMP was a review and standardization of museum-wide procedures, forms, and the Code of Ethics. Although it is logical that diverse collections of a natural history museum sometimes require different procedures for similar tasks based on the broad range of specimen and object types, data collected, and other factors, it is necessary to maintain some consistency across collections. Through the in-depth revision process of the CMP and the development and definition of an internal nomenclature, it was discovered that forms were not always completed in the same manner from department to department, often because what worked for one department did not necessarily work for another. One example of this can be seen in the use of SNOMNH's Accession Worksheet Form, which documents objects after they enter the building but before they are officially accessioned. This form was being used inconsistently between departments. The form also did not have any means of addressing objects acquired through repository agreements with international and federal agencies or tribal governments, which is a common means of acquisition for the Archaeology Department. This knowledge resulted in the recognition that certain forms, such as the Accession Worksheet Form, needed to be redesigned to suit the needs of all of the collection departments equally. The Registrar, in consultation with Museum administration, has begun the process of implementing necessary changes on these forms.

Within the CMP itself, a more detailed description was included in the body of the document that designated which museum-wide procedures were required for certain activities, and the more updated forms produced by the Registrar's Office were attached in the edited Appendices of the document. As others are updated, the Appendices will be revised further. While the CMP review and revision was being undertaken, the Committee also updated the Museum's Code of Ethics, an activity that naturally corresponded with many of the topics already under discussion for the CMP. The new Code of Ethics, which was also made to align with professional best practices, was additionally included as an appendix of the CMP.

Finally, the last new development in the updated CMP was the creation of a Procedural Checklist document (see Fig. 1), which was included in the Appendices of the CMP. This concise checklist provides a practical set of guidelines for each collecting department to use when creating their own collection procedures. This document suggests sections to include within department procedures as applicable. For instance, one of the sections is titled "Cataloging and Databases" and lists the following questions: "How are objects/artifacts/specimens in your department cataloged? What is the timing in regards to accessioning vs. cataloging? What information is important to record? Who engages in cataloging? What database system does your department use and how is the catalog organized? Do you have more than one catalog? What are your documentation standards?" These questions are intended to generate thoughtful discussion among department staff as to the types and amounts of information that should be included within their departmental procedures. While the sections listed in this Procedural Checklist are not required for all departments, department staff members are encouraged to use it as a guide.

The process of updating the SNOMNH's CMP was time-consuming, with multiple review sessions not only by the Committee but by other relevant Museum departments, and eventually by the Museum's administration. Ultimately, though, this process lead to a number of interesting activities, including a reevaluation of museum-wide procedures, the consistent use of Museum forms, and the standardization of the internal nomenclature. When engaging in this kind of policy update, it was determined that the nature of the process itself needs to be highly collaborative, not just in the composition of the Committee, but also in the interactions between the Committee and other individuals and departments within the Museum. Committee members also needed to be flexible,

Checklist for Sections to Address in Department Policy and Procedural Document(s)

This checklist serves as an outline for sections that should be included within each Department's policies and procedures, which are now required by all C&R Departments. These documents, once finalized, will be kept on file with the Registrar's Office. If you feel that a section does not apply to your department, please state so and justify why it does not apply. If you have any questions, please see the Registrar.

☐ **Acquisitions**
How does your department handle acquiring objects/artifacts/specimens? Where are they placed prior to being accessioned?

☐ **Accessions**
How does you department handle accessions? Who is responsible for filling out paperwork or ensuring proper permits/permissions/documentation are present? What is the timing in regards to accessioning vs. cataloging?

☐ **Deaccessions**
How does your department handle deaccessions? Who is responsible for filling out paperwork or ensuring the appropriate individuals have been notified?

☐ **Disposal**
What are the means of disposal considered appropriate for your department? Are there hazardous waste issues to be considered? Do you need special permissions?

☐ **Cataloging**
How are objects/artifacts/specimens in your department cataloged? What is the timing in regards to accessioning vs. cataloging? What information is important to record? Who engages in cataloging? What database system does your department use and how is the catalog organized? Do you have more than one catalog?

☐ **Inventories**
How often does your department engage in full or partial inventories? What information is recorded or verified during these inventories?

☐ **Outgoing Loans**
How are outgoing loans handled in your department? What paperwork is necessary and who completes this paperwork? Are there restrictions on what can be loaned and to where? Are there special considerations for packing and shipping loans?

☐ **Incoming Loans**
How are incoming loans handled in your department? What paperwork is necessary and who completes this paperwork? Are there restrictions on what can be accepted as a loan?

☐ **Collections Care**
What kinds of handling skills are needed for the objects/artifacts/specimens in

Figure 1. Pages 1 and 2 of SNOMNH's Procedural Checklist.

willing to tackle any and all unexpected changes and challenges that might arise throughout the process.

Policies versus Procedures

A good CMP includes a variety of information about the institution's mission statement, the scope of collections, and a number of collections-based topics. If the CMP includes so much information on so many different aspects of museum work, one may question why museums take the time to compose a lengthy and perhaps redundant procedural manual. The reason is that although vital to the operations of any collecting your department? Are researchers, students, and volunteers allowed to handle collection material? What training must they have prior to handling? Are objects/artifacts/specimens cleaned? If so, what methods and materials are used? How are collections labeled? What is the labeling system used and how are labels applied to objects? What kinds of storage or storage materials are used in your department? How are objects transported within and outside the museum?

☐ **Destructive Analysis**
Does your department allow destructive analysis of collections material? If so, explain internal policies and procedures regarding destructive analysis. If not, please explicitly state this in your policy.

☐ **Photography and Reproductions**
Do you engage in or work with photography within your department? What kinds of photos do you take or maintain (i.e. for publication, research, identification, conservation, etc.)? What methods do you use in your department for photography and where are your images stored? What software do you use to facilitate photo taking and/or editing? What other forms of reproduction are used in your department (i.e. scanning, casts, 3-D scanning, transfer of audio recordings, etc) and what methods are used to create these reproductions? What documentation is necessary for these reproductions? How are reproductions stored? Are your reproductions treated as collection items? If so, how are they cataloged and accessioned?

☐ **Record Keeping/Documentation**
What records do you maintain copies of within your department, and where are these records stored? What do you keep hard-copy records of? And what do you keep digital records of? Who maintains these records? Are there internal back-ups of all digital data? Where are your back-ups stored?

☐ **Research and Access**
Who has physical access to your collections (personnel both internal and external to the Museum)? Are there restrictions on who your department will allow to come in and do research or what objects/artifacts/ specimens can be researched? Who approves access to your collections? Do you allow students, researchers, or volunteers, to take any documentation (hard-copy or digital) out of the building? If so, what documentation can be removed and what documentation must stay on-site?

☐ **Emergency Preparedness and Response**
Are there particular considerations with regards to emergency preparedness, response, or salvage that are unique to your collections? If so, state them. If not, reference the Collections Emergency Response and Recovery Plan (CERRP).

☐ **Exhibitions**
Does your department have objects/artifacts/specimens on permanent exhibit? Where are they on display? Who is responsible for monitoring this material? Are there any special requirements for material on display? Does your department engage in temporary exhibits? What is the process for developing or implementing temporary exhibits for your department?

☐ **Other**
Are there other issues, activities, or considerations unique to your department that should be described in a procedural document?

Figure 1. Continued

institution, the CMP presents only the guiding principles or the overall approach a museum should take when addressing each topic; it does not detail how to accomplish a particular task. This is the job of the often-neglected collection procedures. Procedures are a series of specific steps developed to instruct staff on how to carry out the mandates or guidelines presented in the CMP. The procedures are developed at the staff level to provide the mechanism and detailed actions needed to implement the museum's policies (Simmons 2006). This essential document provides an outline for how to approach collections work and details precisely how that work should be carried out within the institution. Both the policies and procedures must work together. They should refer directly to one another and support one another as well as the museum's mission (AAM 2012).

The CMP functions as a good starting point for a variety of collection-related issues. For instance, the SNOMNH's CMP, as well as the numerous additional policy statements on topics such as Integrated Pest Management and Special Events, together contribute to institutional operations. The CMP and additional policies provide great guidelines and benchmarks by which we judge our approaches to various situations, but they fail to tell us specifically how to complete each activity. Often, collection issues present challenging decisions, and with only the CMP guidelines to provide answers, these issues may remain unresolved. The CMP does not explain how precisely objects are accessioned into the permanent collections, what forms are needed for this process, or how the accessioning process differs for the education or teaching collections versus the main research collections. These and other issues often vary widely from one museum to the next depending on the needs, resources, and staffing of the institution. But describing such activities in this level of detail is not the place of the CMP; it is the purpose of collection management procedures. According to Simmons (2006), the sixth step in writing a CMP is to prepare a set of detailed procedures for implementing each policy statement. In practice, this step seems to be frequently glossed over, as was the case for the Ethnology Department at the SNOMNH.

Ethnology Department's Collection Procedural Manual

A procedural manual (PM), or a set of procedures, can be as specific as is needed by a department or institution. The more detail included, the better, because it will vastly improve overall understanding of and adherence to standardized operations for all involved with collection's care. At a minimum, a PM should include lines of responsibility, forms, and steps to inform staff about each individual process or action. The point of writing collection procedures for a collection is to tailor the procedural document to an institution's and collection's specific needs and individualized processes. Reasons for creating a PM are varied but include staff turnover, changes in institutional policies, or simply new developments in the professional field. PMs may differ from institution to institution, but typically the content is defined by what is covered in the CMP.

For most of its history, the Ethnology Department at SNOMNH only had a scattered selection of written procedures, separated into different documents which were stored in various locations, some digital and some hardcopy. There was a document detailing the procedures for handling outgoing loans and a separate document specifying the procedures for applying catalog numbers to collection objects, but there was no comprehensive manual combining all of these procedures in one location, nor was there an explanation of other relevant and necessary procedures. The importance of such an all-encompassing document became evident when staff turnover resulted in the hiring of a new Collection Manager of Ethnology at the SNOMNH in 2012. Although the former Collection Manager of Ethnology did an extraordinary job of keeping the department's records organized and up-to-date, the procedures related to the Department's day-to-day operations lived only in the memories of former and, in some cases, current staff. Conversations with other museum professionals and list serve postings from professional groups indicate this situation is not unique, and that many institutions face the same problems. Evidently, there is a prevailing need for specific and detailed collection PMs at institutions across the globe.

In order to address these problems at the SNOMNH, the staff of the Ethnology Department decided to undertake a project to not only consolidate the existing procedures into one manual but to write additional procedures to explain all processes that had never before been codified. This project was daunting since compiling procedures is a task much easier said than done. It was useful, however, to envision this project as discreet, easily completed steps rather than an overwhelming Herculean task.

The first step was to determine some basic logistics. As with writing a CMP, there were many issues to consider and people to consult with when contemplating creating an Ethnology Department PM. The first issue was who should be allowed to contribute to the PM. The second issue was whether it would be easier and more efficient to encourage different individuals or departments to compose discrete sections of the procedures, later combining them into one overarching document, or whether it would be better for one individual to gather the necessary information from the rest of the institution, compiling everything on their own. Regarding the first issue, the argument could have been made that since the procedures are specific to the Ethnology Department, no one outside of the Department needed to participate in this project. However, because the Ethnology Department relies on other areas of the Museum to engage in daily operations such as the Registrar's Office, the Finance Department, and the Exhibits Department, interdepartmental cooperation proved vital. Addressing the second issue, the approach of allowing different departments to compose their own relevant section of the PM seemed challenging. If different individuals had distinctly different writing styles or if different departments chose to be substantially more detailed than others when composing their relevant sections, this would have greatly affected the resultant manual, leading to an awkward and ultimately less useful document. Based on the available staff resources and the simple practicalities involved, it was decided that to truly make this document effective, the Collection Manager of Ethnology would be responsible for writing the Ethnology Department's procedures with input from other staff and departments as needed.

The next step in the process was to determine what procedural information already existed and what information was lacking. This included determining if the relevant information already existed in another preexisting document, such as with the Museum's Collections Emergency Response and Recovery Plan (CERRP), which already discussed in great detail what would happen in the event of a number of different types of emergency or disaster situations. The CERRP covered everything from the emergency phone tree and identifying priority objects and specimens (e.g., holotypes) to outlining how to salvage objects made from a variety of different material types and what companies could be relied upon to provide salvage equipment in the event of an emergency. Since the CERRP document was already very specific, it would have been redundant to duplicate this information in the Ethnology Department's procedures when discussing emergency preparedness and response. Instead, it was determined that documents such as this could be cited in the PM rather than be completely rewritten within the document. The same approach was used for other documents such as the Integrated Pest Management Policy and the Object/Specimen Handling Guidelines for Collections and Exhibitions, both of which were referenced in their relevant sections and were attached to the PM in the appendices.

At this point in the process, it was useful to come up with an organizational structure for the PM. Using the CMP as a guide was extremely helpful and resulted in a more direct correlation between the procedures and policy documents. Additionally, because of the checklist developed through the CMP revision process (as discussed above), the development of a useful and logical organizational structure for the PM was much more streamlined. The checklist also allowed for a more focused look at specific topics that needed to be included within the PM including acquisitions and accessions, cataloging, deaccessions and disposal, inventory, loans, collections care, photography and image use, record keeping, integrated pest management, collections access/research, security, emergency preparedness and response, and exhibitions.

Once it was determined what procedural information was known and where it was located, it was then necessary to determine who within the institution had the missing information. The Collection Manager of Ethnology set up meetings with various staff members who held the institutional memory for how different processes were supposed to be completed, including the Curator of Ethnology, the Registrar, the Head of Exhibits and other current staff members. When approaching these meetings, it was determined that a preset list of questions would be a valuable tool to focus each discussion. Specific questions such as "Who is allowed to sign this form?" were much more valuable and resulted in more specific information than a more general question might have. These meetings were essential in order to obtain necessary information for the Ethnology Department PM.

After these fruitful meetings concluded and a draft procedural document was written, current Departmental and Museum-wide procedures were examined with a critical eye. There were some common activities for which there were no written procedures, and no other institutional sources were able to provide relevant input. Therefore, it was necessary to review current operations to determine if they were being undertaken in a rational, efficient manner that corresponded with professional best practices and then actually write these procedures down. In some cases, it was necessary to completely change certain activities that were not aligned with current best practices. For example, labeling standards for the Ethnology Department had been operating in the same manner for the previous 10 years or more, with little alteration. The best practices related to labeling ethnographic objects, however, had changed, becoming much more streamlined and varying due to different object and material types. For instance, where in the past it was considered acceptable to label the bottom of baskets made from woven plant fibers using an archival-safe paint or pen, now, it is generally accepted that baskets should be labeled with an attached archival tag and not have a permanent label applied to the generally fragile (and difficult to write on) basket surfaces. The staff, volunteers, and interns needed to be aware of and respond to these kinds of new developments, so new relevant procedures were composed and inserted into the PM.

An unintended consequence of creating this comprehensive PM was to force the staff to analyze their current actions and routine processes in comparison with best practices in the museum field and update them accordingly. Compiling a PM required a great deal of focused thought on the Department's current operations, and it forced the Ethnology Department to confront inconsistencies in procedures, which while useful, were sometimes challenging to discuss and resolve. Additionally, as with the CMP, updating procedures resulted in a standardization of the Ethnology Department's internal nomenclature and consistent use of forms, databases, materials, and tools within the Department.

Although the CMP, in addition to the Department Procedural Checklist, provided good guidelines for what to include within the PM, it was decided to add a few additional sections that were not included within the CMP as well as remove a few sections that would be irrelevant for the Ethnology Department. For instance, the Ethnology Department does not in any way deal with live animals, so including procedural information on how to ethically and logistically handle live animals in the Department procedures would not have made any sense. On the other hand, the Ethnology Department, unlike the biological sciences, regularly interacts with living human artists and makers of ethnographic objects as well as the descendants of those artists and makers of objects that are held in the Ethnology Department's permanent collections. Procedural issues that result from these interactions range from the ownership of copyright and intellectual property to the repatriation of Native American sacred objects under the mandates of the Native American Graves Protection and Repatriation Act. These are the kinds of issues that other Departments at SNOMNH do not regularly need to handle and therefore would not need to include in their own procedural documents. Because of the nature of the collections held by the Ethnology Department, it was necessary to address these relevant procedures in the Department's PM.

When writing new procedures or even when updating existing procedures for the Ethnology Department, visual aids proved to be very useful. Photos or screenshots were utilized to further explain or emphasize a specific step or process. For example, a photo of the type of camera used during object photography, a screen shot of a catalog record in the collection management database, and a photo of a typical type of label used in the labeling process were all used to explain the written procedures. Since this document was specific to the Ethnology Department, it included as few or as many of these types of visual tools and sections as the collection staff deemed necessary to document and explain the procedures.

A glossary of terms was then added at the beginning of the PM, and an appendices section was added at the end. A glossary was deemed extremely important because it clarified to the reader what specific terms meant and how they were used throughout the procedural document. This section included the definitions of terms used in the course of the PM, many of which were discipline-specific or institution-specific, such as "Citizen Science," "Field Collection," or "Head Curator." If someone unfamiliar with the regular operations the SNOMNH, such as a new staff member, were to reference a section of the PM, the glossary would be necessary to ensure ease of comprehension when they run across an unfamiliar term or a term used in an unfamiliar way. Having appendices at the end of the document was useful for attaching any relevant documents referenced throughout the course of the PM. This included the CMP, other policy statements or documents, examples of forms, and other reference material. These documents all supplement the PM in one way or another.

Once the Ethnology Department's procedures were compiled, updated, and written down in one comprehensive working document, the PM needed to be reviewed and officially approved. While input and advice were sought for the PM from a variety of sources, there only needed to be an internal review and approval by the staff of the Ethnology Department, unlike the CMP. Many stages of revision were necessary before the staff were satisfied with the end product, especially since this was the first ever PM for the Department, but the overall Museum administration did not need to review and approve the document.

Ultimately, it took the Ethnology Department a full year to write the Department collection PM. There were, of course, always many other tasks that needed to get done simultaneously, from cataloging new incoming materials to engaging in exhibit-related activities. This is a common challenge for many museums and collecting institutions: finding the time to go through the process of creating a PM. Based on the experience of writing the Ethnology Department's PM, if the project is envisioned as a process with specific steps, or if it is broken down into small discrete parts, it makes the overall project seem much more manageable.

In moving forward, updating the Departmental procedures will be continuous since the nature of procedures is ever-changing. The cyclical nature of the update process will include the following steps: (1) review of current Ethnology Department procedures; (2) ensure the current procedures implement the CMP and other relevant institutional policies; (3) compile all new or edited procedures and integrate them into existing procedures; (4) Ethnology Department staff review and revise procedures as needed; (5) internal department approval of all procedures; (6) ensure all Ethnology Department staff, volunteers, students, and interns understand and follow all procedures, including new changes and additions; and (7) as Ethnology Department activities change, determine new procedures, and update the Ethnology Department PM to reflect new procedures. These steps will then be repeated as needed.

Much of the procedural information discussed above already existed for the Ethnology Department either in written format or simply in the minds and memories of the staff members. However, to be truly effective, it needed to be consolidated and recorded in a comprehensive manner that could be referenced as needed. This was determined to be especially important so that when staff turnover occurs or new students or volunteers need training, a complete and detailed set of procedures is already in place to instruct and guide the new workers, ensuring a smoother transition and a more consistent operation of the Department.

Conclusions

Both policies and procedures are necessary documents for museums, and they both serve their own special purposes. While the Collection Management Policy is the guiding force for staff on all kinds of complex issues, procedures detail specifically how the CMP should be implemented based on the circumstances of individual collections or departments. The SNOMNH's 2014–2015 CMP update led to a number of interesting discoveries and activities, including a reevaluation of Museum-wide procedures, the consistent use of Museum forms, and the standardization of the Museum's internal nomenclature. The highly collaborative nature of the project, not just among the Committee members but also in the interactions between the Committee and other individuals and departments within the Museum, resulted in bringing the SNOMNH's CMP in line with professional best practices for all of the collecting departments.

Creating the first-ever Ethnology Department procedural manual at SNOMNH was an additional learning experience and resulted in a great deal of standardization of activities and logical reevaluation of how procedures are to be carried out in the Department. A revised nomenclature, new codified procedures, and a plan for future revisions have greatly enhanced how the Ethnology Department fulfills its stewardship responsibilities. The collection procedures complement the CMP in detailing the step-by-step actions needed to complete all museum-related processes. Although the CMP is intentionally more static in nature, the PM is not set in stone, becoming as fluid and dynamic as it needs to be based on changes in procedures, personnel, or new developments in the professional field. Both the CMP and the procedures play a vital role within museums and collecting institutions, but even with a strong CMP, without a comprehensive PM, it is difficult to ensure the implementation and continuation of good collection stewardship practices in a museum or institution.

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