

MUSEUM NOTE: COLLECTIONS STANDARD

This Museum Note will help your museum to comply with the Ontario government's **Collections Standard** outlined in the [Standards for Community Museums in Ontario](#).

Standards enable community museums to:

- provide the appropriate care and management of collections
- meet visitors' expectations
- be accountable and transparent to the community, funders and donors

Objective of the collections standard

As a community museum, the artifacts you keep represent your community's heritage. To protect their value, you must maintain a well-organized, managed and documented collection.

The Collections Standard provides useful guidance about how museums should manage their collections, in general. The policy you develop to meet the standard will depend on the type and size of your institution, your mission and your community

Collections planning – a stewardship (public trust) responsibility

A museum's resources include:

- staff and volunteer time
- finances
- exhibits
- storage space

Collections planning ensures that these resources – and your museum's ability to properly care for objects and provide public access – are considered before accepting an acquisition or loan.

It also allows you to better determine whether your collection:

- supports your mission
- represents the needs and interests of your community
- should be changed – by acquiring or deaccessioning artifacts

Collections Policy

Under the *Standards*, the museum's collections policy **must**:

- support the museum's statement of purpose
- support the museum's mission
- support the museum's value statement

- assign roles and responsibilities to your museum's board, committee and staff
- authorize staff to make decisions about the collection e.g.
- describe the process for accepting or purchasing objects for the collection
- describe the deaccessioning process for objects from the collection

Your museum's collections policy **should**:

- focus on your museum's governance and operational role
- be concise and easy-to-read
- recognize the difference between policy and procedure.

A policy:

- addresses the 'what and why' of your collection.
- focuses on your long term goals

A procedure:

- addresses the 'how, when and where' of your collection
- changes frequently

For instance, the Guelph Museums Collections Policy indicates **what** the museum will do, e.g. issue tax receipts for donated artifacts; and **why** it will do it: because Revenue Canada requires that the museum issue receipts at fair market value.

Reference: Guelph Museums Collections Policy

2012. <https://members.museumsontario.ca/resources/tools-policies/CMOG-standard-resources>

You can develop a single collections policy or create two distinct policies focusing on collections development and collections management.

Whatever your preference, your collection policy must:

- identify the scope and use of the collection:
 - what the museum will collect consistent with its mission statement and its resources, (both human and financial)
 - existing collection strengths
 - community needs
- identify priorities for collection development

- commit board, staff and volunteers to follow:
 - the museum's ethical guidelines for collecting and collections management
 - municipal, provincial, federal and international legislation that impacts collecting and collections management
- commit the museum to:
 - develop, implement and review the procedures and documentation for acquiring and deaccessioning artifacts in the collection

Note: Do not include procedures in the policy document

- establishing conservation standards in the labeling (attaching accession number), care and handling of artifacts
- ensure the museum has in place, and follows appropriate procedures to:
 - document incoming and outgoing loans
 - manage collections records
- distinguish between objects in the collection that can be used (hands-on, education collection, operating collection¹) and those that are restricted for study or research
- commit to observing municipal, provincial and federal legislative requirements that impact collections management and documentation e.g.
 - firearms
 - hazardous materials
 - copyright
 - Freedom of Information and Protection of Privacy Act
 - Cultural Property Export and Import Act
 - Income Tax Act (see deaccessioning below)
- require an emergency preparedness and disaster plan for the museum that is updated and tested on a regular (specified) basis
- ensure that the building and collection is appropriately insured or, at a minimum that loaned objects, both incoming and outgoing, or objects in temporary custody are insured.

¹ An operating collection might include equipment or vehicles in industrial collections that are maintained in working order for demonstration purposes or rides.

Collections and museum ethical guidelines

Your collections management policy should commit board, staff and volunteers to following a specific code of ethics, including personal collecting and conflicts of interest.

Staff should:

- receive a copy of the museum ethics
- verify that it has been read and accepted

Reference: [Ethics Guidelines, Canadian Museums Association](#)

Reference: Code of ethics for museums, [International Council of Museum](#)

It is unethical to:

- treat your collection as a financial asset – artifacts should not be listed as assets on your financial statements
- sell objects from the collection to support the museum
- acquire objects with the intent of trading or selling them later

You **can** sell objects from your collection for new acquisitions or collection care, in accordance with the section of the Collections Standard regarding deaccessioning.²

Collections Management practice: plans and procedures

Museum staff and volunteers must develop – and follow – procedures for:

- cataloguing acquisitions (purchase, gift) – including clear guidelines on what the museum collects and the process of acceptance
- the use of - and restrictions - on various categories of artifacts in the collection
- deaccessioning objects from the collection³
- incoming and outgoing loans
- management of collections records
- guidelines for conservation appropriate labeling (attaching accession number)
- the care and handling of artifacts.⁴

² Collections cannot be identified as a source of income for the museum. It is unethical to sell objects from the collection in order to financially support the museum's operations, facility management, or any reason other than acquisitions or collections care in accordance with the standard and ethical practice regarding deaccessioning. Selling objects from the collection **may** result in making the museum ineligible for future funding.

³ When it comes to deciding if objects are acquired or removed from the collection, it is advisable that these are made by a collections committee and approved by governing authority or the senior staff person. This adds a level of accountability in terms of the legal ownership of its collection and prevents theft or fraud. (AMA Standards Handbook, p.147)

⁴ Some museums may, for neatness or consistency, choose to put this in a conservation policy.

When developing your museum's plans and procedures for collections management, use your museum's policy as guidance.

Deaccessioning artifacts

In October 2012, Revenue Canada issued [Consequences of Returning Donated Property](#) related to its Income Tax Act.

If your collections policy and procedures have not been reviewed and revised since October 2012, please revise them immediately to ensure that "Return to donor" is no longer identified as a deaccessioning option. Notifying the donor is also not recommended.

Recommended Resources

General Resources

Alberta Museums Association. Standard Practices Handbook for Museums, 3rd edition. 2014. *Excellent Collections Management resource for context, policy, practice, planning and procedures.*

International Council of Museums. Code of Ethics for Museums. Paris: ICOM, 2013. http://icom.museum/fileadmin/user_upload/pdf/Codes/code_ethics2013_eng.pdf

International Council of Museums. ICOM Guidelines for Loans. "ICOM News 27, no.3/4 (1974). http://archives.icom.museum/loans_eng.html.

Resources: Collections

Buck, Rebecca A. and Jean Allman Gilmore, eds. The New Museum Registration Methods. Washington, D.C.: American Association of Museums, 1998.

Canadian Heritage Information Network. "Making Up the Rules: New Documentation Standards for Canadian Museums." 2014. http://www.pro.rcip-chin.gc.ca/carrefour-du-savoir-knowledge-exchange/nouvelles_normes_musees-new_museums_standards-eng.jsp

CMOG Standards Resources: Collections

<http://www.museumsontario.com/en/35/597/148> for:

Dietrich, Bev. *Deaccessioning Good Practice*. 2012

Gerrard, Richard. Archived OMA webinar and notes on Deaccessioning. 2013

Gerrard, Richard. *An Introduction to the Deaccession & Disposal of Collections*. 2013

Guelph Museums. Collections Management Policy – Guelph Museums. 2012.

Canada Revenue Agency. "Issuing Receipts." <http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/menu-eng.html>

Norris, Linda. the uncatalogued museum.

<http://uncatalogedmuseum.blogspot.ca/search/label/planning> Collection planning.

Saskatchewan Museums Association. Collections Documentation Downloadable collections management forms <http://www.saskmuseums.org/online-resources>

Resources: Conservation

CMOG Standards Resources: **Conservation**

<https://members.museumsontario.ca/resources/tools-policies/CMOG-standard-resources>

Be Prepared: Guidelines for Small Museums for Writing a Disaster Plan, Collections Australia Network.

Museum Note: Handling Museum Objects, Ministry of Tourism, Culture and Sport.

Resources: **Physical Plant**

CMOG Standards Resources: **Physical Plant**

<https://members.museumsontario.ca/resources/tools-policies/CMOG-standard-resources>

Nesbitt, Bill. Archived OMA webinar and notes on Emergency & Disaster Plans. 2013

Nesbitt, Bill. *Emergency Service Providers Checklist Template*

Nesbitt, Bill. *Emergency Supplies Inventory*

Nesbitt, Bill. *Emergency Team Job Descriptions*

Nesbitt, Bill. *Staff Emergency Procedures Template*

Canadian Conservation Institute. CCI Notes 14/1 and 14/2: *Emergency Preparedness for Cultural Institutions: Identifying and Reducing Hazards* <http://www.cci-icc.gc.ca/resources-ressources/ccinotesicc/14-2-eng.aspx>