



COLLECTIONS MANAGEMENT POLICY	HALDIMAND MUSEUMS
	2001 Revised: 2005; 2007; 2012; 2018

1.0 POLICY

Haldimand Museums Collections Management Policy sets forth the goals with respect to the development of the collections of Haldimand Museums (Edinburgh Square Heritage & Cultural Centre, Haldimand County Museum & Archives and Wilson MacDonald Memorial School Museum). The policy outlines responsibilities, standards and ethics for collections management activities.

Haldimand Museums' collection is the repository of the public collection representative of Haldimand County's history, under the trusteeship of The Corporation of Haldimand County. The collection is held and managed in the public trust.

Collection Development

1. The development of the Haldimand Museums collection follows the focus established by the mission statement.
2. Development of the collection will meet both the immediate and long-term objectives of Haldimand Museums.
3. Collections development will build on strengths and address weaknesses of the existing collection as defined by the Curators and will take into account current and future projects and requirements.
4. It is recognized the priorities will change over time and according to storage capabilities, future exhibitions and the recognition of deficiencies in the collection.
5. The responsibility for the development of the permanent collection rests with the Curators.
6. The responsibility for the development of the education collection resides with the Curators.

Acquisitions

1. Artifacts that best represent the understanding of past cultural, social, political and industrial development of Haldimand County and according to its Mission Statements will be accepted. The collections are made for the purpose of documentation, preservation, research, exhibition and interpretation for all generations.
2. Artifacts must be specific to and typical of Haldimand County:
 - Artifacts produced in Haldimand County
 - Artifacts related to historically important people, places and events
 - Artifacts sold in Haldimand County

- Artifacts used/owned in Haldimand County
 - Artifacts made, utilized, sold or imported prior to or after the stated collection periods may be collected if their provenance is seen as an asset to the collection.
3. Haldimand Museums will not acquire objects that:
 - Have been collected under circumstances to be exploitive, unethical, illegal or otherwise incompatible with professional standards.
 - Are curiosities or other items that do not signify the history or development of Haldimand County
 4. Acquisitions will be made in accordance with the laws of Ontario and other provinces, Canada and international agreements between Canada and other countries.

Methods of Acquisition

1. Objects/artifacts will be acquired through: donation, bequest, exchange or purchase.
2. The Supervisor, Heritage & Culture Unit will be consulted before the purchase of any item for the collection.
3. All donations are received free and clear of restricting conditions as to the use and future disposition, unless otherwise agreed in special circumstances at a meeting of the Haldimand Museums Advisory Board. Where conditions are attached to an acquisition, every effort will be made to place a reasonable date on the time for which they shall apply.
4. Acquisitions involving transfer of ownership and/or responsibility must be accompanied by a signed donor form or other proof of legal title to the object, such as a transfer or title form a bill of sale.
5. No item will be collected that requires extensive conservation treatment without the approval of the Curator
6. The Haldimand Museums Advisory Board shall form the Acquisitions Committee will formally accept artifacts on an annual basis.

Collections Management

1. Artifacts will be stored and handled according to current professional standards. The Curator will ensure that adequate time and proper workspace are available for the purpose of collections management activities.
2. Haldimand Museums will demonstrate a commitment to conservation standards in the labelling, care and handling of artifacts.
3. An inventory will be maintained in order to ensure current information about the collection for management and insurance purposes.
4. Duplication of artifacts or artifacts that do not meet the Collections Mandate but may be useful to the museum would not be accessioned, but may be considered for the Research or Educational Collection.
5. In the event of accidental loss or damage or destruction, the Supervisor, Heritage & Culture Unit or their designate will be notified and a written report shall be submitted to the Haldimand Museums Advisory Board.
6. Haldimand Museums (Haldimand County) may issue tax receipts to donors of artifacts that are accepted into the permanent collection. Appraisals must be completed by an accredited appraiser and will be done at the donor's expense.

7. All artifacts must have a signed donor form before a tax receipt is issued.
8. Tax receipts are *not* issued for artifacts donated to the Education Collection, unless the artifact is deemed of great importance by professional staff.

Documentation

1. Haldimand Museums will accurately and carefully document the collection to recognize its value and significance. Documentation is essential for collection development, research, preservation and interpretation.
2. Documentation will be the responsibility of the Curator(s).
3. Documentation will include information in written, electronic, audio visual or graphic form pertaining to the identity, locality, provenance and transfer of legal title of artifacts in the collection and other related information regarding significance, function, description and condition. When being integrated into the collection, each artifact must be described in sufficient detail to enable the detection of any deterioration. Any change in condition or treatment to an artifact will also be documented.
4. Temporary or permanent change in the status of an artifact such as an outgoing loan, on exhibit or deaccessioned must be thoroughly documented.
5. Haldimand Museums will use accepted and consistent standards, methods and procedures to document the collection. Documentation must be maintained as a permanent record. Normally documentation itself is not considered part of the collection.
6. Legal documents dealing with acquisitions (i.e. bequests) must be kept in hard-copy form with a duplicate set stored in an off-site location. Copies of electronic records must be maintained and stored off-site. Documentation should be maintained in a secure and stable environment.

Collections Management Activities

Haldimand Museums collections management activities shall be the responsibility of the site Curator. The Curator shall ensure that all collection records are current and up to date.

Collection records will be documented using a combination of manually (paper) and electronically generated records.

Records will include:

- Original owner and/or manufacturer
- Original use of the artifact
- History of the artifact
- Other details associated with the object

The following methods to process a new acquisition into the Museums' collection will be maintained.

- All artifacts will be registered by current collection management standards.

This would include:

- a) temporary receipt
- b) gift form
- c) accession number
- d) catalogue sheet – to include:
 - donor name and address
 - region
 - period used
 - provenance
 - description
 - manufacturer name and addresses

- location – room and shelf number
- e) condition report (at the time of donation and/or as they receive treatment)
- f) donor address card
- All artifacts shall be recorded in an accession register, have a catalogue card, donor card, classification and signed gift form.
- Electronically generated records are stored on Haldimand County's mainframe and will be duplicated bi-monthly. Manual records – specifically the accession register – will be duplicated once per year. Duplicate records will be kept off-site in Haldimand County records retention.
- Artifacts will be catalogued using a three-part number system consisting of the year of the donation, the number of the donation and the number of artifacts in the donation. (2001.001.001). The number must be physically attached to the artifact in a uniform, inconspicuous area.

Loans

1. Incoming loans will be accepted only for a defined period of time and for definite purposes of display, research, special project or education.
2. Long-term loans or conditional donations of artifacts will not be accepted.
3. Haldimand Museums will be responsible for all incoming loans, and will exercise the same care given to the Museum collection.
4. Incoming loans remain the responsibility of the owner for insurance purposes unless other arrangements are made between the owner and Heritage & Culture Unit.
5. Outgoing loans of museum artifacts may be made to other institutions judged to have properly maintained exhibition standards, environmental conditions, security and insurance.
6. Outgoing loans will be for a specified length of time and may be extended upon the agreement of both parties.
7. All out-going loans will be insured by the borrowing institution.

De-accessioning

1. In order to maintain proper museum standards and in accordance with Haldimand Museums Mission statements de-accessioning is occasionally necessary.
2. De-accessions will be approached with caution and only upon the recommendation of the Curator to the Advisory Board; recommendations will be made on an annual basis to the Haldimand Museums Advisory at their Annual General Meeting
3. Haldimand Museums have the right to de-accession any artifact that:
 - a) does not fit the collections mandate
 - b) is a duplication/triplication
 - c) is not significant to the history of Haldimand
 - d) is a danger to staff, volunteers, the public or the collection.
 - e) Is deteriorating due to natural decay, insect infestation or damage
4. Documentation information will be retained in a de-accession file.

5. No artifact will be de-accessioned for the sole purpose of profit.
6. No staff member or Board member may profit financially or otherwise for an object's de-accession.

Ethics of De-accessioning

1. Reasonable effort shall be made by Haldimand Museums to ensure the artifact remains in the public domain
2. No artifact will be de-accessioned for the sole purpose of profit
3. No member of the Haldimand Museums Advisory Board, staff or their families may acquire or profit from objects de-accessioned by the Museum
4. **RETURNS** - According to the Canada Customs and Revenue Agency (Bulletin IT-11oR3 Gifts and Official Donation Receipts) Haldimand Museums CAN NOT return an artifact to the original donor, whether or not a tax receipt was issued. An artifact may only be returned to the rightful owner if it is determined that the Haldimand Museums do not have legitimate ownership, or as the result of a repatriation process
5. Any funds resulting from the disposal of items from the collection will be used for new acquisitions to the collection or used in caring for, conserving or maintaining the collection

De-accessioning artifacts will occur in the following order:

- a) Repatriation including:
 1. Repatriation of human remains: Return or reburial of human remains. This occurs regardless of how the remains were acquired
 2. Cultural or Art Repatriation: The return of cultural objects, religious items used in worship, or works of art to their country of origin, or former owners/heir. In these cases repatriation occurs when the items were acquired illegally or unethically
- b) Used as part of Haldimand Museums educational or research collection
- c) Offer to another tax-exempt non-profit educational, heritage or cultural institution, as a gift or for exchange.
- d) Physical destruction:
 - (i) On the advice of a conservator or provincial police/armed forces or if the object is in extremely poor condition or
 - (ii) The artifact is in extremely poor condition and may have no documentation related to its authenticity, origin or history. Haldimand Museums may decide to physically destroy the artifact, as it is of no monetary value nor historical significance, nor importance to another institution. In such cases the following steps are taken:
 - a. catalogue number (#) and all museum markings are removed
 - b. The artifact is smashed into small pieces, in the presence of witnesses (preferably a Haldimand Museums Advisory Board member and/or another Haldimand County employee)

- c. The museum records notes pertaining to the de-accessioned artifact indicate date of destruction
- d. It is wrapped and deposited at a Haldimand County landfill site in the presence of witnesses (preferably a Haldimand Museums Advisory Board member and/or another Haldimand County employee).
- e. Sale or auction (only as a last resort when all other avenues have been exhausted, will this method be chosen. No Haldimand Museums' staff nor Advisory Board member nor volunteer will know which auction is involved nor the date of the auction. Any monies earned by the sale of the de-accessioned artifact(s) will be sent to Haldimand Museums and placed in a fund for the purchase of artifacts.)

Documentation information will be retained in a de-accession file.

2.0 DEFINITIONS

MISSION STATEMENTS

Haldimand Museums Mission Statement: Haldimand County Museum & Archives, Edinburgh Square Heritage & Cultural Centre and Wilson MacDonald Memorial School Museum, together known as Haldimand Museums, has been established to tell the story of the founding settlement and social history of Haldimand County, and its community, to present. Haldimand Museums, operated by The Corporation of Haldimand County and governed by the Haldimand Museums Advisory Board, will collect, preserve, research, exhibit and interpret a collection of historical artifacts. It will serve the inhabitants of Haldimand County and the surrounding area by carrying out these functions and by an emphasis on special activities at the museums. The museums and the museum grounds are available to all local, non-profit organizations, with the permission of the curator, to present complimentary activities and events.

Haldimand County Museum & Archives: To collect, preserve, display and research historically significant artifacts and archival materials pertaining to Haldimand County. To function as an educational and interpretive centre and archives, and to conduct outreach activities in the community through special services, events and programmes.

Wilson MacDonald Memorial School Museum: To collect, preserve, research, house, exhibit and interpret the history of all those objects that best serve to represent pioneer and rural education in Ontario; and all those objects relevant to the poet Wilson Pugsley MacDonald (1880-1967)

Edinburgh Square Heritage & Cultural Centre: To collect, catalogue, preserve, study and exhibit information and objects that illustrate the historical founding, settlement and development of the communities of Haldimand County. The beginning of pioneer settlements to the mid-20th Century will be covered through research and displays. This will include a special emphasis on the history of the local gypsum industry, and research information on the Gypsum industry Canada wide. The museum and cultural centre will collect and preserve materials of historic significance, and hold events of local interest.

Accessions: Accessions involve materials transferred to the museum by legal transfer of ownership. This will include all items donated, purchased and transferred from other organizations.

De-accessioning: De-accessioning refers to the permanent removal of one or more artifacts from the permanent collection.

3.0 SCOPE

The Collections Management Policy will be used by Haldimand Museums' staff and volunteers, the Manager, Community Development and Partnerships and members of the Haldimand Museums Advisory Board.

4.0 RESPONSIBILITY

1. Haldimand Museums' collection is held and managed in the public trust.
2. Haldimand Museums will demonstrate a commitment to ethical behaviour in the development of its collection (repatriation).
3. Haldimand Museums will meet municipal, provincial and federal legislative requirements that impact on:
 - a) Collecting activities (illicit or illegal materials).
 - b) Collections management and documentation (firearms, hazardous materials).
4. Haldimand Museums will, depending on restrictions and condition, make the collection available to the public for research purposes.
5. Decisions regarding Haldimand Museums' acquisitions or de-accessions/disposals will follow the approval levels set by the Haldimand Museums Advisory Board in this policy
6. Haldimand Museums will provide a budget line in their annual operating budget for the cataloguing, storage and care of objects.
7. The Curators, under the direction of the Supervisor, Heritage & Culture Unit will ensure that a percentage of each individual Haldimand Museum operating budget be used for the purchase of conservation and curatorial supplies.
8. The Manager, Community Development and Partnerships will maintain a percentage of the Haldimand Museums' operating budget be used for the purpose of staff training and professional memberships.
9. Haldimand Museums through the Community Development and Partnerships Division will carry out a training program for seasonal staff and volunteers to assist in collections management and conservation in order to establish best practices. Haldimand Museums' shall continue to encourage its staff to develop skills in collections management and conservation in order to meet Community Museums Standards set out by the Ministry of Culture.
10. The Collections Management Policy will be reviewed annually (or at any time when changes are considered necessary) by appropriated Department staff and will be approved by County Council.

5.0 DISTRIBUTION

Policy HM-03 will be distributed to all Haldimand Museums staff, the Haldimand Museums Advisory Board, the Haldimand County Clerk, and the Province of Ontario through the Community Operating Grant application.

6.0 LOCATION / AVAILABILITY

Policy HM-03 will be located on the Staff Information Network. Hard copies will also be available at each museum and from the Supervisor, Heritage & Culture Unit.

7.0 REFERENCES

Canadian Museums Association Ethics Guidelines (2006)
Canadian Museums Association Roles and Responsibilities of Museum Boards of Trustees