

**KESWICK RIDGE HISTORICAL SOCIETY MUSEUM**

**COLLECTIONS MANAGEMENT  
POLICIES AND PROCEDURES MANUAL**

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## **I MISSION STATEMENT AND OVERVIEW**

### **1.1 Keswick Ridge Historical Society: Purpose and Mission**

The Keswick Ridge Historical Society (KRHS) was formed in 1999 as a community-based organization sustained by volunteer resources. Its chief interests are in preserving properties, artifacts, traditions and records of local historical significance, as well as encouraging community commitment to and appreciation of those cultural assets.

### **1.2 Properties and Goals**

Currently (in 2006), the principal goal of the KRHS is to continue developing two historic structures which occupy the Keswick Ridge Superior School property: the Superior School and McKeen's Corner Store. Within the school, one classroom has been reserved for hosting community events, workshops, society meetings and a seasonal tea-room. In the other classroom, the KRHS maintains and displays a collection of community artifacts and historic documents. Plans to restore McKeen's Corner Store await satisfactory completion of the Superior School project.

### **1.3 Membership and Organizational Structure**

The Keswick Ridge Historical Society encompasses Executive Officers, Members, Friends, and three Directors. Members (including Executive Officers) meet monthly to discuss and develop ongoing projects, consider funding alternatives, organize fundraising events, and compile local heritage resources. Only Members are eligible to vote on Society business. Society headquarters are located in the Keswick Ridge Superior School.

Membership is open to all interested individuals, with executive officers elected biennially at the annual meeting. Executive offices include but are not limited to President, Vice-President, Secretary and Treasurer.

The KRHS is a non-profit organization with registered charity status.

### **1.4 Policies and Procedures Manual**

The purpose of this document is to establish guidelines for building, managing and ensuring the well-being of the KRHS collections. It is designed to clarify appropriate action, decision making, and record-keeping in order to avoid confusion and arbitrary acts. It serves to guide staff in carrying out their responsibilities and it defines professional ethics. Established museums have long recognized the importance of articulating the scope of their collections, their procedural protocols and their professional standards. Such a guide is perhaps even more vital to an organization whose activities (including collections management) are undertaken by part-time volunteers rather than permanent museum professionals. It is very important that everyone handling the collection become familiar with this document, particularly the following sections:

- 1.4 Policies and Procedures Manual
  - 2.1 Purpose and Philosophy of the Museum Collection
- 2.3 KRHS Museum Collections
- 2.6 Access to the Collections
- 2.7 Authority
- 3 Museum Personnel and Ethics
  - 4.1 Initial (Temporary) Acquisition
- 7 Storage and Care of Collections

This policy and procedures manual covers all artifacts which the KRHS is considering for acquisition or which it has already acquired for its permanent collection, including archival material. It does not govern purchases the Society may make, or gifts the Society may accept, of objects which are not intended for the permanent artifact collection.

Annual reviews of this manual are recommended to ensure that policies meet ethical, legal and professional standards and continue to align with the mandates and organizational structure of the Museum (for example, changes to decision-making procedures will be necessary if the KRHS establishes a separate Board of Directors). Where necessary, amendments may be made to museum practices as outlined by provincial and national museums associations. Recommendations may come from volunteers associated with the collection, KRHS members, or visitors, but the ratification and implementation of policy amendments rests with the Collections Committee, and requires the approval of the Executive.

## **2 KESWICK RIDGE HISTORICAL SOCIETY MUSEUM**

### **2.1 Purpose and Philosophy of Collection**

The KRHS collection is an assemblage of objects owned by the Museum and held in trust for the public. The collection is sustained not for the benefit of the KRHS Museum or Society, but for the public it serves. It is maintained for the exclusive purposes of research, preservation, and presentation to the public. As the caretaker of collected items, the KRHS aspires to conscientiously observe all contemporary legal, ethical and administrative standards of museum practice. The KRHS seeks to provide an open and friendly environment where its collection may be enjoyed and employed as an educational resource.

### **2.2 Museum Space**

The Keswick Ridge Historical Society Museum complex includes exhibition space in three locations: (1) The front classroom of the Keswick Ridge Superior School, (2) The back classroom of the Keswick Ridge Superior School, also utilized as a tea room and venue for community events and (3) the McKeen's Corner Store, currently under restorative reconstruction.

### **2.3 KRHS Museum Collections**

The KRHS Museum maintains two distinct collections:

### **2.3.1 Permanent collection and archives**

The permanent collection and archives consists of all objects and documents of historical significance that have been permanently acquisitioned by the KRHS Museum. These are objects and documents about which a deliberate acquisition decision has been made, and for whose care the KRHS is currently responsible. Objects in the permanent collection cannot be disposed of except through a formal deaccession process. (See Section 8, “Deaccession and Repatriation of Objects.”) Examples of artifacts in the permanent collection might include school textbooks, antique furnishings, crockery, or items of clothing. Note: Furnishings and utility items are only considered part of the collection if they are formally accepted by the Collections Committee and accessioned. Thus, the KRHS will own many items of minimal historical significance (certain tables, certain teacups, display cases, etc.) which are not part of its permanent collection and are not subject to the same collection criteria or standards of care.

Archives are non-current and non-published printed, manuscript, audio or film material. Archive material includes, but is not limited to, correspondence, diaries, notebooks, registers, maps, plans, photographs, film, video and audio recordings, drawings, and charts. Archives may, on exceptional occasion, include published works. School textbooks are generally *not* considered archival material.

### **2.3.2 Research Collection**

The research collection of the KRHS consists of non-archival printed matter and photographic reproductions. These informational resources are stored separately from the material and archival collection and serve to educate both staff and visitors about the collection and its broader historical significance. The research collection should be treated as an information library and will not be subject to the same collecting restrictions as the material collection. The KRHS welcomes into its research collection any articles, books or printed reproductions that might be useful in addressing historical queries.

## **2.4 Collecting Criteria**

As a repository for the community’s material heritage, the KRHS will consider personal and public artifacts, household and farm implements, furniture, books, documents, and other materials for acquisition.

The KRHS’s collecting objectives are informed by a conceptual framework built around two themes: (1) The educational history of the Keswick Ridge Superior School and (2) the human and natural heritage of the community served by the Keswick Ridge Superior School, roughly comprising the Parish of Bright. Preference will be given to items produced and utilized in the historical period of the school’s operation, 1884-1969, although older items will also be considered. Recognizing that objects from the twentieth century are generally more prevalent in communities, an additional criterion of

exceptionality, rarity, or particular representativeness will be applied to items of relatively recent origin. Ideally, the collection will represent the entire historical interval without undue emphasis on any single period. As a representation of community life, the collection will be predominantly composed of utilitarian and decorative artifacts rather than high-style furniture or fine art, but the KRHS should consider any items that could contribute to a more diverse and inclusive understanding of the historical community. Though personal and family effects may comprise a significant portion of the collection, spatial and other constraints may give the KRHS cause to impose an additional criterion of *public* community relevance: consistent with the exhibition of public community life as it unfolded in the Superior School and McKeen's Corner Store.

Because storage space is limited in the Museum complex, the KRHS will seek to primarily collect objects that are logistically, physically, and thematically appropriate for display in one of its three exhibition locations (front and back classrooms or store). Items considered for acquisition must meet several criteria including spatial fit, fulfillment of collecting objectives, and reasonable care requirements.

Each object acquired by the Museum represents a commitment to preserve and hold that object perpetually in public trust. Artifacts must not be accepted with the intent (deliberate or otherwise) of eventual deaccession and disposal. Accession is therefore a serious decision, undertaken by a committee of members, the Collections Committee, who meet periodically to weigh the costs and benefits of accepting each object into the permanent collection.

The following are some basic considerations for the Collections Committee:

- Is the object consistent with the collecting goals of the Museum?
- Does the object contribute in a significant way to our historical understanding?
- Is the object unusual enough to warrant preferential consideration?
- If the object is available for purchase, is it of particular importance to the collection, and is the price reasonable? Might it or a comparable object be obtained by gift or bequest, at less expense to the Museum?
- Can the Museum properly care for, store, and display the object?
- Will the object be used in the foreseeable future? Is it destined for a particular use or to fill a particular void in the collection?
- Is there a good faith intention to keep the object in the Museum's collection for the foreseeable future?
- Is the provenance of the object satisfactory and is it accompanied by reliable documentation?
- Is the object a duplicate of an artifact currently in the collection? If so, does it hold particular value as a duplicate? Is it a better specimen than the one currently held, or could it free up an artifact for outgoing loan?
- Is the use of the object restricted by conditions set by the donor? Will such conditions become unwieldy in the future? (An example of a reasonable condition might be to keep all objects in a photo album together. An example of an unreasonable condition might be to keep the object permanently on display.)

- Is the use of the object encumbered or restricted by a copyright, trademark or patent?
- Is the object in reasonable condition? Can the Museum care for it with as little alteration to the object as possible? If in poor condition or incomplete, is the object rare and/or valuable enough to the Society to proceed with acquisition?
- Can valid title and all rights to the object be conveyed to the Museum? Note: the KRHS will not consider fractional gifts.
- Is the object culturally sensitive, sacred, or subject to repatriation by a cultural group?
- Does the object meet any of the criteria for deaccession? If so, it is possible that the object will not be accessioned in good faith.
- Is the object an additional duplicate of duplicated objects already held in the collection? Unless it could serve a specific function within the Society's program (use in traveling educational kits, reenactments, comparative research, etc.) then the object should not be accessioned.
- Is the use of the object encumbered by its nature? For example: is it defamatory? Does it imply an invasion of privacy? Is it physically hazardous? Note: the KRHS does not currently accept any firearms into its collection.
- Will accepting this object create additional expenses for the Museum, either for conservation, maintenance or storage?
- Does the object bear special connotations which fall within the collecting mandate of another museum that specializes in that subject?

## **2.5 Artifact Loans**

The KRHS may occasionally have the opportunity to loan objects to, or borrow objects from, other institutions. The same standards of care and responsibility that the KRHS accepts for its permanent collection will also extend to any artifacts placed temporarily under the custody of the Society.

All policy statements related to the care of the permanent collection also apply to both outgoing and incoming loans. Borrowers must demonstrate a commitment to care - to the best of their ability - for objects loaned to them by the KRHS. The KRHS Curator will ensure that the appropriate standards for security and preservation of loaned objects are met. The Registrar will ensure that loan activity is precisely documented, and that loan files are current and complete.

### **2.5.1 Outgoing loans**

Generally, the museum will only loan objects to other nonprofit or educational institutions for purposes of study, public education, or exhibition. The KRHS Collections Committee must approve the conditions of all outgoing loans, and reserves the right to refuse a loan when its purpose is not in keeping with the mandate of the museum (examples might include requests to use objects as theatrical props). The KRHS must be satisfied that the loan will fulfill an educative purpose and that the object(s) will not be

vulnerable to mishandling or damage. Loans will generally be short term; not exceeding one year, and should be reviewed regularly by the Collections Committee.

The borrower will pay the costs of packing and transporting the object(s).

The borrower will provide appropriate insurance for the artifacts, in consultation with the Society.

All objects considered for outgoing loan will be approved by the Collections Committee, and an **outgoing loan agreement** will be completed for each object. The loan agreement will include the name, organizational affiliation, address, and signature of the person or institution responsible for the loan; the name and address of the KRHS Museum; the exact dates of the loan period; the purpose of the loan; insurance requirements; packing and handling specifications; and any special conditions, provisions or restrictions (for example, security precautions, credit lines or photographic privileges) that apply to the object on loan.

See Section 5.3 for procedures pertaining to outgoing loans.

### **2.5.2 Incoming loans**

Objects may be borrowed by the KRHS for temporary exhibition with approval from the Collections Committee.

It is the KRHS's policy not to accept indefinite or permanent loans, as this may generate confusion over ownership, dependency on borrowed objects, and responsibility for deterioration that occurs over the long term. Though loan terms may be renewed, no single loan term should exceed three years.

The KRHS will, to the best of its ability, provide incoming borrowed artifacts with the highest possible standard of care and attention. The Society will not clean, repair, or make changes to any borrowed item without the permission of the lender.

The Society will assume the costs of packing and transporting the object(s) to and from the KRHS Museum.

All objects considered for incoming loan will be approved by the Collections Committee, and an **incoming loan agreement** will be completed for each object. The loan agreement will include the name, organizational affiliation, address, and signature of the person or institution responsible for the loan; the name and address of the KRHS Museum; the exact dates of the loan period; the purpose of the loan; insurance requirements; packing and handling specifications; and any special conditions, provisions or restrictions (for example, security precautions, credit lines or photographic privileges) that apply to the object on loan.

See Section 5.2 for procedures pertaining to incoming loans.

### **2.5.3 Temporary exhibitions**

The KRHS may from time to time invite, or accept offers from, community members who wish to temporarily exhibit their own collections on KRHS Museum premises. Temporary exhibits have great potential for cultivating positive relations between the Society and community, and can add thematic dimensions to the presentation of local interest topics. Persons wishing to exhibit their own collections at the KRHS must cooperate with the Curator and Registrar in outlining in writing the specific terms, processes, and logistics of a temporary exhibit. In every case, such exhibits must be short term (not exceeding 6 months) and hosted by the KRHS at the owner's risk. Though the KRHS Museum will offer interpretive support, and provide care in accordance with accepted museum standards, it will not insure the collection, nor will it accept the costs of packing or transport of objects to or from the Museum.

### **2.6 Access to the Collections**

All holdings of the KRHS are to be preserved for research projects, educational programmes, permanent and temporary exhibitions. Our mandate is to maintain all items and documents in our collection (including curatorial files, with some restrictions) in such a way that they remain accessible to visitors and researchers working under the supervision of KRHS staff on Museum premises. Certain objects in the collection may also be loaned to schools and groups for educational purposes, provided the loan is approved by the Collections Committee and borrowers adhere to artifact handling standards as outlined in the KRHS Museum policies and procedures manual.

#### **Restrictions on access:**

The KRHS will permit visitors to view our stored and exhibited permanent collection, research collection, and (with permission) most curatorial records pertaining to artifact provenance. Sensitive or confidential information however, will be stored separately from the accessible files, and will only be available to collections management personnel, or to others by special permission from the Curator or Registrar. Sensitive or confidential information includes, but is not limited to, donor contact information (phone numbers and addresses), artifact appraisal values, and Collections Committee minutes. Donor identity must be treated as confidential if the donor has requested to remain anonymous.

A guestbook sign-in system should be used to record the names of visitors to the Museum, as well as the date of visit. The guestbook should be formatted with fields for contact information and research interests, which visitors may complete if they wish to be contacted by the KRHS regarding events or research. Museum staff should informally note the date and times of arrival and departure when a researcher or staff member has had direct or extended involvement with the collections.

Such objects as may be threatened by frequent handling may be determined jointly by the Curator and Registrar to be inaccessible to visitors except by special permission.

Where possible, the Curator or Registrar will conduct a brief interview with prospective researchers to address the scope of their particular research projects and outline any policies and procedures that may apply to their interactions with the collection. Researchers producing any printed (published or unpublished) work which includes data or images collected from KRHS collections must acknowledge the KRHS Museum as the source, and include accession numbers in the credit line of any image of a KRHS object, photo, or document.

## **2.7 Authority**

Authority to modify Sections 3 through 10 of this policies and procedures document rests with the Collections Committee, with the approval of the President.

The Collections Committee has the authority to approve objects for accession without consultation with the larger Society. However, the Committee's final decision to deaccession or dispose of an artifact must be approved by the executive. Should the Collections Committee vote in favour of deaccession, this decision will be recorded in the minutes of the Collection Committee, and a special meeting of the executive will be called to approve the decision.

Authority to modify documents pertaining to the acquisition of objects in the collection rests with the Registrar.

Authority to modify documents pertaining to the characteristics and provenance of objects in the collection rests jointly with the Curator and Registrar.

Gift agreements must be signed by the President, and outgoing loan forms must be signed by the Curator.

In special circumstances, permission to remove objects temporarily from the Museum premises may be given by majority vote of the Collections Committee to the Curator, Registrar, or other volunteer concerned with the collections. Temporary removal will be treated as an outgoing loan, and as such will be recorded and tracked using the outgoing loan documentation.

## **3 MUSEUM PERSONNEL AND ETHICS**

### **3.1 Roles and Responsibilities**

The **Collections Committee** consists of no fewer than three and no more than seven Society members, including the Museum Curator and at least one member of the KRHS executive. (In the event of a tied vote of the Collections Committee, the Curator will have an additional tie-breaking vote.) Members are appointed by the Executive and confirmed by the Membership at each annual meeting of the KRHS, to serve for the coming year. The primary duty of the Committee is the assessment of artifacts for acquisition (whether

through donation, trade, gift-in-kind, transfer from another institution, salvage, or purchase), and the assessment of artifacts for deaccessioning and disposal. Additional duties include acting in an advisory capacity to other Society members about the use and preservation of the collection, regularly reviewing and refining collections policies and procedures, and encouraging donations from the public by promoting the fact that the Society welcomes donations and will preserve and exhibit them in a responsible manner. The Collections Committee will give an annual report to the KRHS Society, outlining its activities, acquisitions, and significant decisions.

The **Curator** is responsible for the care and exhibition of all objects in the KRHS's research and permanent collections; the implementation of collections management policies; and regular communication with the broader Society regarding the Museum collections. The Curator will conduct and coordinate research on accessioned objects and historical context. He or she is appointed by consensus at an annual meeting of the KRHS. Every two years thereafter, the Curator's term will be reviewed and renewed at the discretion of the KRHS. The position is part-time and volunteer.

The **Registrar** is responsible for the management of all records relating to the KRHS collections, and is jointly responsible (with the Curator) for organizing the archival collection. He or she assigns accession numbers and maintains a file for each object in the permanent collection, documenting its accession, exhibition, use and movement, both within and outside the Museum. The Registrar is appointed by consensus at an annual meeting of the KRHS. Every two years thereafter, the Registrar's term will be reviewed and renewed at the discretion of the KRHS. The position is part-time and volunteer.

The **Volunteer Coordinator** is responsible for managing all volunteer resources relating to collections management at the KRHS. The Volunteer Coordinator may be the Curator, Registrar, or other KRHS personnel. He or she is appointed by consensus at an annual meeting of the KRHS. Every two years thereafter, the Volunteer Coordinator's term will be reviewed and renewed at the discretion of the KRHS. The position is part-time and volunteer.

**Volunteers** are responsible for collections management activities as determined by the Volunteer Coordinator. This may include exhibit design, documentation, research and artifact care.

### **Interaction with visitors**

In order to maximize the interactive learning experience provided by the Museum collection, staff and volunteers should provide visitors with a structured orientation or introduction to the Museum. This presentation could be brief or in-depth, individualized or scripted, depending on the guide's knowledge and the visitor's interests and needs. Visitors who wish to handle the archival or object collections will be briefed on handling procedures, and furnished with cotton museum gloves if necessary.

## **3.2 Ethical Standards**

Any museum operating as a charitable trust assumes an obligation to use the collections solely for the public benefit. Its policies and practices, as well as the conduct of its staff, trustees, and volunteers must stand up to public scrutiny as sound, ethical, and in the best interests of the community, the collection, and the relationship between the Museum and the community.

It is essential that there be no conflict of interest, or the appearance of conflict of interest, between a KRHS affiliate and the Museum in the acquisition or disposal of collection items, and objects in the collection should never be subject to personal use. Important decisions pertaining to collections will be made by unanimous agreement among members of the Collections Committee.

All personnel who play a role in the collecting activities of the Museum must maintain a familiarity with – and a conscientious commitment to – the ethical standards which guide museum practice in Canada. These standards are based on the underlying values of accountability, transparency, fairness, honesty and respect, and are outlined in the *Ethics Guidelines* booklet, published by the Canadian Museums Association in 1999, and filed with this policy. (These guidelines are also available online at <http://www.museums.ca/media/Pdf/ethicsguidelines.pdf>)

### **3.2.1 Copyright**

Copyright law is complex and ever-changing. Museums have an obligation to educate themselves on current copyright law before embarking on any activities that involve reproducing or photographing original works. The KRHS Museum will ensure that it has secured the appropriate copyright or license before reproducing items for sale, including images that are modified or decontextualized. When it acquires material directly from an artist or individual who holds copyright, the museum will ensure that royalty and reproduction rights are negotiated and documented before making any reproductions of that work.

#### **Photographs**

Photographs are a particularly salient case. The following copyright rules of thumb must be borne in mind when dealing with photographs acquired by the KRHS Museum:

- The author of the photograph is the person who was the owner of the initial negative, plate and/or photograph at the time it was made. Transfer by deed of gift to the Society does not include the transfer of the copyright.
- Photographs taken on or before December 31, 1948 are in the public domain and no permission or payment is required. For photographs taken on or after January 1, 1949 the term of protection is life of the author plus 50 years.
- Photographs may be used for research, private study, newspaper reporting, criticism and review without infringement of copyright. For any other use, including publication, written permission of the owner of the copyright is required.
- To reproduce photographs of living people, their written permission is required.

Note: Copyright laws may have changed since the preparation of this policies and procedures document.

## 4 ACQUISITION AND ACCESSION PROCEDURES

*Acquisition* is the process of transferring legal ownership of an object to the KRHS. *Accession* follows acquisition, and is the formal process by which an object is brought within the management and responsibility of the Museum.

The acquisition and accessions process can be broken down into three major steps:

- initial (temporary) acquisition – when the object first arrives on KRHS premises
- permanent (formal) acquisition – when title is transferred
- formal accession – when the object is numbered and the acquisition documented

### 4.1 Initial (Temporary) Acquisition

The following steps characterize the initial (temporary) acquisition process for *gifted* and *bequeathed* items upon arrival at the Museum. Salvaged items, purchases, and transfers from other museums generally do not require the issuance of a temporary receipt, therefore, they do not follow the process below, but go directly to consideration for formal acquisition. See Section 4.2

- The process begins when an object is offered or becomes available to the Museum through gift or bequest.
- The object(s) should be accommodated onsite at the KRHS Museum as it awaits processing and accession. At this time, the Curator will issue a temporary receipt to the potential donor.
- Potential gifts (but not salvaged items or purchases) require the issue of a **temporary receipt** to the prospective donor. Two copies of the temporary receipts must be completed: one for the donor and one for the KRHS.
- If the donor is offering more than one object, the temporary receipt must list each individual item, and all items must be boxed or arranged together, to ensure that items are not separated. The KRHS staff member should itemize all objects, then mark the box with the donor's name or with an identifying number if the donor wishes to remain anonymous.
- A temporary file must be prepared containing
  - any available information about the object's provenance
  - a copy of the temporary receipt
  - donor contact information
- Although it is advisable to assign a unique number to these temporary items, it will usually be sufficient at this point to identify objects and collections by their

donor. They will receive a permanent number if and when they are accessioned into the permanent collection.

## 4.2 Formal (Permanent) Acquisition Processes

### 4.2.1 Gifts and bequests

- This part of the process is performed by the Curator and Collections Committee.
- The Curator will assess the temporarily received object(s) for historical value, condition, care requirements, and relevance to the KRHS collection.
- The Curator will then prepare a report (**acquisition proposal**) for the Collections Committee.
- At the next meeting of the Collections Committee, the Curator will make a case for accepting or rejecting the object for permanent acquisition.
- No decisions about an acquisition or deaccession will be taken unless at least three members of the committee are present.
- A copy of the Curator's proposal, with the decision and rationale of the Collections Committee will be included in the accession file of the object if it is accessioned.
- If the Collections Committee declines to accept the object, the Curator will issue a **letter of decline** to the donor and arrange for the donor to remove the object(s) from KRHS premises. The Registrar will then staple together all documents pertaining to that object, including a copy of the letter of decline, and file alphabetically by donor in a folder labeled "Donations Rejected [year]."
  - Note: If the donor requests that the KRHS dispose of any or all rejected objects, then the KRHS may do so, but must first obtain written permission from the donor. (This document to be kept with the "Donations Rejected" file.)
- If the object has been accepted and the donor has requested a tax receipt, the Curator will arrange with the donor to have the object monetarily appraised at the donor's expense.
  - Note regarding appraisals: In order to avoid a conflict of interest, the KRHS requires that all appraisals be performed by a qualified appraiser, whose knowledge of the object and the market will enable him or her to determine a fair market value for the object. It is important to select a qualified appraiser on the basis of competence, reputation and reliability, as the KRHS may be called upon to explain the selection in the event that

the appraisal is contested. The curator or another qualified KRHS volunteer may perform appraisals for objects valued less than \$1000. One outside appraisal is required for values between \$1000 and \$3000, and two outside appraisals are required for values in excess of \$3000. The KRHS should avoid recommending a particular appraiser to donors, though it is acceptable for the KRHS to provide a list of qualified appraisers when requested to do so.

- If the Collections Committee agrees to accept the object, the Curator will issue two copies of the **gift agreement** for the donor to sign, along with an **acknowledgement of receipt of gift** expressing the KRHS's appreciation for the gifted object(s). To finalize the transaction, the president will sign the acknowledgement section on both copies of the gift agreement. One copy of the gift agreement will be sent to the donor, along with the letter acknowledging the gift, and the other copy will be placed in the object's accessions file. Note: In the case of bequests, the KRHS will retain on file evidence of the transfer of title, a copy of the provision of the will and copy of the final receipt the KRHS signs accepting the bequest. A deed of gift is not appropriate documentation for a bequest. Transfer is not final until the administration of the estate is approved in court.

#### **4.2.2 Salvaged items**

Salvaged items brought to the Museum by Society or community members will be acquisitioned by decision of the Collections Committee, as above. The transaction will not require the issuance of temporary receipts, letters, or gift agreements and will not require an appraisal.

#### **4.2.3 Items transferred from other museums**

The transfer of items from another institution will be negotiated in writing by the KRHS and the other institution as necessary. The transaction will satisfy the documentation requirements of the KRHS and said institution. Copies of all relevant documents must be kept in the object's accession file.

#### **4.2.4 Purchased items**

Ideally, the purchase of items for accession will be a rare event, and the KRHS will rely chiefly upon gifts, bequests, and salvage to build its collections. But collections development may occasionally occur opportunistically, and significant artifacts can sometimes only be saved through purchasing. An acquisitions budget should be maintained for the purchase of artifacts judged by the Collections Committee to be vital to the KRHS collection. Where possible, the Collections Committee should meet to approve a purchase *before* it happens, but because this is not always possible, the Committee should determine in advance what types of objects would be considered for purchase, and who will be authorized to make the purchases, (in addition to the Curator).

The Collections Committee and KRHS are under no obligation whatsoever to reimburse independent purchases made by KRHS members on behalf of the Museum, unless those purchases are specifically authorized in advance. Members are, of course, welcome to donate items they have previously purchased, and in such cases the acquisition will be treated as a gift.

The Registrar will ensure that all receipts of purchase, purchase order numbers, bills and all relevant documents are kept with the accession file of the purchased and accessioned object.

### **4.3 Accession**

The Registrar, assisted by volunteers as necessary, will perform most of the duties related to accession, which should take place *as soon as possible* after formal acquisition is completed.

#### **4.3.1 Documenting the accession**

First, the Registrar records the accession in the **master log** book noting the object(s) name(s), date and number(s).

The Registrar then assigns a unique number to the object after consulting the master log to determine the next number in sequence. He or she affixes a temporary number label to the object with string. Numbering will follow this pattern:

- The prefix “K” designates the object as part of the KRHS permanent collection.
- The first two digits represent the year (for example, 06 for 2006), followed by a period.
- The next two digits represent the number of the accession, which includes all objects acquired at one time from the same donor. If only one object has been acquired from that donor, the object number ends at this step. For example, if the Museum acquired a single inkwell from one donor, and it was the eleventh acquisition in the year 2005, its number would be K05.11
- A period and additional digits are assigned if the object is one of several acquired from a single donor at one time. For example, if the eleventh donor gave 14 objects at one time in 2005, those objects would be numbered K05.11.1, K05.11.2, K05.11.3 and so on.
- Objects with two or more separate parts, or broken objects in two or more pieces should have a unique number for each piece, usually designated by a letter suffix. For example, a soup tureen and cover might be numbered K06.5.11a and K06.5.11b respectively.
- If a donor makes two or more donations over a single year, and they are formally acquisitioned at separate times, they should be considered separate accessions and receive different accession batch numbers. For example, the Collections Committee accepts a textbook from a certain community member in

January of 2006. It is the second acquisition of the year and so it is accessioned as K06.2. The Committee then accepts a school bell and slate from the same donor in September of 2006. This is the eighteenth accession of the year, so these objects are numbered K06.18.01 and K06.18.02 respectively. A master style sheet for numerals will guide the Registrar and volunteers by specifying which typographical variants of digits (such as 4) should be used in numbering.

The Registrar then completes a **condition report** form for the object.

The Registrar ensures that all documentation surrounding the acquisition and description of the object in question is gathered together in a master file for that object, and filed by object number.

The Registrar fills out a curatorial **catalogue worksheet** containing the number of the object, the date of acquisition, donor contact information, a description of the object, dimensions, provenance, dates of use and manufacture, etc. The catalogue worksheet is a double-sided document, with all potentially sensitive information, such as appraisal value and donor contact information appearing on the back. This arrangement will allow staff members to easily make copies of the non-confidential fields for visitors who specially request curatorial information about an object.

The original completed catalogue worksheet is then placed in the object's master file, containing all information relevant to the object and its accession, including gift agreements, purchase receipts, etc.

Note: The catalogue worksheet is a permanent, legal record that must be securely stored and never disposed of. One backup copy of each accession form should be kept offsite in case of accidental destruction of the original. Ideally, the backup copy will be in electronic format and stored in a KRHS Museum catalogue database.

#### **4.3.2 Marking the artifact**

The Registrar then numbers the object, choosing an inconspicuous location for the number. The method of application should be reversible and appropriate to the object medium. The number should be small, neat and legible. It must not obscure maker's marks or major design elements, and it should not be applied to unstable surfaces, such as flaking paint, corroded areas, parts that are liable to break off, or regions that receive wear, friction, or pressure. It should not be applied where excessive handling would be necessary to locate it (for instance, numbers on large heavy objects should be on the back near the base, not on the bottom.) On objects of a similar type, number location should be as consistent as possible.

Above all, the marking method must have minimal impact on the integrity of the object. Therefore, marking methods and materials will differ depending on the object type:

- China, glass and ceramics: On the base of the object, apply a base of white acrylic

- artists' paint and write the accession number in black ink upon this base..
- Wooden and metal objects: In an unobtrusive location (such as the bottom of a drawer or under a chair seat), apply a layer of white acrylic artists' paint and write the accession number in black ink upon this base.
  - Textiles: Write the accession number on a piece of cotton tape in black ink, and sew the tape to the object.
  - Photos: Using a soft pencil, write the accession number on the back of the photograph in the top right hand corner. Do not use any kind of pen or marker.
  - Archival documents and paper: In the upper right corner of the document, write the accession number in pencil. Do not use any kind of pen or marker. Note: Donations of archival documents will frequently include several items, and each distinct document should receive a unique number. But the collection itself will have only one accession file which will contain donor information, a description of the collection, and ideally, a *finding aid* that assists researchers in locating certain documents in that collection on the basis of subject and/or date. A copy of this finding aid will be made available to visitors.
  - Books: Write the accession number in pencil inside front cover, or title page (if cover is missing.) Do not use any kind of pen or marker.

### **4.3.3 Photographing the artifact**

The Registrar then photographs the object for the digitized database and includes a copy of the photo(s) in the master accession file.

#### **Photography guidelines**

The image capture process should produce digital images of high quality that can later be used for virtual exhibition, artifact identification and research, artifact protection, and outreach activities. Choosing a common process and format when digitizing a collection will facilitate subsequent image processing and storage. Photographers should follow these guidelines:

1. Set camera for highest quality possible, and on a light/flash setting that captures the "true" colouring of the object and minimizes glare from shiny surfaces. Guard against distortion by composing the photograph so that the depth of field is as small as possible. For example, in a photo of a lengthy object, the end most distant from the camera will appear disproportionately small. In such cases, the photographer should stand directly over the object to get as true an image as possible.
2. Use a uniform neutral background with a minimum of folds, seams or breaks.
3. Include artifact identification cards, rulers for scale, etc. where appropriate, but not so close to the object that they will be difficult to crop out at a later date. Never obscure the subject of the photograph with a card, marker or ruler.
4. Download images periodically to clear the camera card.
5. Keep a paper copy listing object name and accession number in the order that photographs are taken.

6. Save the images to an appropriate and accessible file on the computer, in .JPG format.
7. Use an image-naming convention that corresponds to the accession numbers of the objects, but with dashes in lieu of dots. It is important that a thumbnail or exhibition photo have a separate file name from the full size image of the same object. Use an “M” prefix for the master image.  
Example: The master image of K98.6.4 would be named MK98-6-4.JPG

## 5 LOAN PROCEDURES

### 5.1 General Procedures:

The following documentation must accompany all outgoing and incoming loans:

- The **loan agreement** will include the name, organizational affiliation, address, and signature of the person responsible for the object(s) for the duration of the loan period; the name and address of the location where the object will be held; the accession number(s) and description of what is being borrowed, including its physical condition; the exact dates of the loan period; the purpose of the loan; insurance requirements (if any); packing and shipping specifications; and any special conditions, provisions, or restrictions, such as security precautions, credit lines, photographic privileges, etc.
- Personnel handling the loan should ensure that there is a recent photograph of the object in KRHS Museum records.

Packing, unpacking, transportation, and installation of artifacts can present hazards to the personnel involved, as well as to valuable museum objects. These activities therefore necessitate careful precautions. Artifacts are most vulnerable to damage during unpacking and repacking, which should be done by trained personnel. Repacking should be done by the same personnel who packed the items, and the same materials should be used. Abundant padding and careful separation within a box will usually constitute appropriate packing.

All arrangements for transportation, care and exhibition of the loaned object(s) should be clearly written down and agreed to by both the lender and the borrower.

The borrowing institution will not make any reproductions, casts, copies, or photographs (other than for the purposes of a condition report) of borrowed objects except as permitted by the lender.

### 5.2 Procedures Specific to Outgoing Loans

- A request for a loan from the Society's permanent collection must be made in writing, and should include the purpose for which the requested artifact is needed, as well as the length of time the artifact will be borrowed.

- Requests will be considered by the Curator, in consultation with the Collections Committee.
- The Curator will consider
  - the Society's need for the object in the time period requested
  - the suitability of the loan with regard to the KRHS Museum's mandate and philosophy
  - the physical condition of the artifact (Is it strong enough to withstand travel and handling?)
  - any conditions to be placed on the loan regarding use, handling, care and timeframe
- An **outgoing loan agreement** will then be completed to document the details of the loan, including a description of the object and its condition. Two copies of this agreement will be signed by the borrower and the owner. One copy will accompany the loan.
- All documentation on the loaned artifact will be placed in a separate "Loans" file area for the duration of the loan.
- When the loaned object is returned, its condition will be evaluated and compared with the condition in which it left the KRHS Museum. The Curator and Collections committee will work with the borrowing institution to resolve any discrepancies.
- The artifact will then be returned to storage or exhibit.
- In some cases (namely day-loans to schools) a KRHS staff member may accompany and supervise a temporary loan, to ensure that objects are handled with care and to facilitate learning.
- Note: The KRHS does not insure its collection or outgoing loans.

### 5.3 Procedures Specific to Incoming Loans

- After the Collections Committee identifies an object it wishes to borrow from a lending institution, a request to borrow that object will be made in writing. The request should include the purpose for which the artifact is needed, as well as the length of time the artifact will be borrowed. The request will bear the signature of the Museum Curator.
- If the lending institution approves the request, the Curator will negotiate the terms of the loan with the lender, covering stipulations regarding the term of the loan, copyright, packing and repacking, transportation, care, installation, exhibition, and insurance.
- The KRHS will clearly inform the lending institution – *before* the object leaves its premises – that the KRHS does not insure its collection, and therefore does not insure borrowed items.
- The lending institution will draft an outgoing loan agreement, or similar legal document, which itemizes all loaned objects and all terms agreed to by the two parties. The president of the KRHS and the Curator will sign on behalf of the Society.

- The KRHS will complete two copies of the **incoming loan receipt** form, which will be signed by the Curator on behalf of the Society and countersigned by an agent of the lending institution or individual. The terms of the loan will be stated on the incoming loan receipt. One copy will be given to the lender and the other will be retained by the KRHS. This documentation will be placed in an “Incoming Loans” file (electronic and hard copy), along with all additional documentation regarding the incoming object(s).
- Upon receipt of the object(s), the Curator or Registrar will verify the condition of the object(s) as it is described in the lending institution's outgoing loan object description. If there is a discrepancy, the lending institution will be contacted and a settlement sought.
- At the end of the loan period, the Curator will coordinate return of the object. After receiving and examining the object, the lending institution will sign to acknowledge that the object has been received. The signed document will finalize the termination of the loan and should be kept in the Incoming Loans file.

## 6 ORGANIZATION OF THE COLLECTION AND RECORDS

The permanent collection consists of artifact holdings and archival holdings. (For definitions of these collections, see section 2.3.1, Permanent collection and archives.)

### 6.1 Permanent Collection: Artifacts

Given the current shortage of storage space, the KRHS will seek to exhibit as many of its artifacts as possible, chiefly in the smaller classroom of the Keswick Ridge Superior School. The exhibit space will also house the archival finding aids.

#### 6.1.1 Annual inventory

Under the direction of the Curator and Registrar, collections volunteers will perform an annual inventory of artifact holdings, verifying that all objects in the permanent collection can be located onsite, and noting any artifact issues that require special attention, such as a decline in condition, a fading accession number, or any environmental feature that poses a threat to an object.

### 6.2 Permanent Collection: Archives

Accessibility to archival holdings is an important goal of the KRHS, and to that end the archival finding aids (which index the specific components of various document collections) should be located in a convenient visitor-accessible area with a table nearby where researchers can study archival documents. The archives collection itself will be held in the storage area, away from direct light, preferably in vertical, acid-free storage boxes and always in acid-free archive-quality folders.

Researchers who wish to view individual files will complete an **archive retrieval form** and hand it to the staff member on duty, who will then bring the requested file(s) from the storage area to the researcher's table. Copies of all archive retrieval forms should be kept together in a file, as a record of which files have been viewed by visitors. Researchers

who wish to handle documents or artifacts should first be briefed by Museum volunteers on proper handling procedures. (See section 7.1, Guidelines for Handling Artifacts.) Depending on the condition of a given photo or document, and the availability of technological equipment, Museum volunteers may fill requests from researchers to photocopy or scan archival holdings for private use.

**Archival organization:**

Archives should be organized and categorized according to accepted principles, to ensure that provenance is honoured and that components are easy to locate. Great care must be taken to arrange the files so that order is preserved and files are coherently indexed.

When it is anticipated that fragile archival documents will be handled frequently (for research and reference purposes), every effort should be made to copy or transcribe those documents and minimize handling of the originals. Copies should be filed in the research collection, and a note placed with the original document to direct researchers to the less fragile copy.

**6.3 Research Collection**

The research collection consists of non-archival printed matter and photographic reproductions. This may include photocopied articles, research notes and reports, books, magazines, copies of primary source documents or photos, and other informational resources. The research collection should be treated as an information library, designed to educate both Museum staff and visitors about the collection and its broader historical significance. It will be stored separately from the material and archival collection and may be located in the main working area or main exhibition room. In its formative stage, the research collection will be organized alphabetically by subject, but if it grows rapidly, Museum staff should consult someone with library training who can implement a formal cataloging system.

**6.4 Administrative Files and Working Area**

One room or portion of a room will be designated as the curatorial working area, with the KRHS's computing equipment, printer, scanner, photocopier, administrative files, artifact and document receiving area, work table, and space for two or more volunteers to perform administrative and research work.

Museum documentation and administrative files will occupy one or more filing cabinets and will include, but not be limited to, the following distinct file divisions:

- Administrative files:
  - KRHS minutes (with separate files for regular society, collections committee, and other subcommittee meetings.)
  - KRHS activity notes (information and notes on fundraising events, etc.)
  - accession files (master files containing all documentation on objects or document collections, filed by accession number)
- Museum documentation
  - temporary acquisition files (documentation on objects awaiting accession)
  - master log (a chronological list of all items accessioned by the KRHS)

- donor file (donor contact information - filed alphabetically by last name)
- exhibit files (specific information pertaining to the conception, creation, and logistics of special Museum exhibits)
- deaccessions file (if any - filed by accession number)
- objects rejected file (filed by date)
- loan files (incoming and outgoing - filed by lending institution or accession number)
- archive request forms file (forms submitted by researchers, filed by date)
- archival finding aids (housed where visitors can easily access them.)

Some records will be produced electronically, and printed for permanent filing. Electronic copies will serve as backup and as searchable records.

#### **6.4.1 Filing standards and protocols**

Volunteers who work with the KRHS collections should make every effort to acquaint themselves with an accepted nomenclature scheme for classifying artifacts. The Registrar will consult an accepted historic artifact nomenclature guideline or handbook (such as *Canadian Parks Service Classification System for Historical Collections*) when assigning common descriptive names and alternate names to accessioned objects. Likewise, universal terms should be used when reporting on the physical condition of objects. Volunteers are directed to the “Condition Reporting Glossary” from *The New Museum Registration Methods*, fourth edition, 1998, edited by Rebecca A. Buck and Jean Allman Gilmore pp. 57-60 (excerpt filed with this manual).

Names are generally written surname first, for example: Smith, John M.

The letter “c.” (for *circa*) is used when the object was produced within a ten-year period, that is, within five years before or five years after the date indicated. For example, an object dated c.1845 would be considered to have originated between 1840 and 1850.

Copies of documents, articles, and photographs will be labeled as such with a “COPY” stamp or, where appropriate, a less obtrusive penciled label.

Although it is the aim of the KRHS to keep most accessions data on electronic file as a searchable backup, hard copies of all relevant and non-confidential curatorial information will be maintained and made accessible to staff and visitors.

#### **6.4.2 Importance of communication**

Because the KRHS Museum is staffed by several part-time volunteers, it is exceptionally important to communicate all significant activities and decisions in writing. Volunteers who are authorized to make changes to documents or to the order of documents should, wherever possible, notify other volunteers of the changes in an appropriate and obvious way. For example, if a volunteer has made a copy or transcription of a delicate archival document, they should file a note with that document directing other volunteers and

researchers to the copied version. There should be a journal in the administrative area, in which volunteers/staff can leave informal messages detailing relevant activities, questions, or announcements.

## 7 STORAGE AND HANDLING

Volunteers and staff members must be aware at all time of their responsibility to preserve and protect all objects in the Museum's collection. Fulfilling these responsibilities includes appropriate handling and storage of objects as defined in this document, restricting the movement of objects within boundaries defined by the Curator and Registrar, compliance with security measures and ongoing monitoring of conservation requirements.

### 7.1 Guidelines for Handling Artifacts

KRHS volunteers should familiarize themselves, as well as any visitors who will interact with the collection, with these guidelines for handling:

- In order to avoid damaging paper fibers with oils and dirt, wear cotton gloves when handling archival documents. Consider copying or transcribing documents that will be handled frequently.
- Cotton gloves should be worn when handling most artifacts, unless gloves make handling the object very precarious or slippery.
- Remove dangling jewelry or watches, and avoid wearing loose clothing when working with artifacts.
- If an artifact must be moved, map out the move ahead of time. Anticipate obstacles, clear a path, and prepare a place to set the artifact down.
- Always use two hands when picking up an artifact.
- Avoid lifting an artifact by its most vulnerable section. For example, while it might be second nature to pick up a tea cup by its handle, the handle is actually the weakest part of the cup and may break or loosen.
- Never pick up a heavy framed object by the top of its frame, always with a hand on both sides, or on one side and bottom. Carry and set framed works in a vertical position.
- Avoid touching photographs or works on canvas except by the edges.
- Don't hand an object to another person. Set it down, and have the other person pick it up.
- Unwrap or unpack objects on a solid surface, rather than in mid-air, to avoid breakage if the object slips or falls.
- If an artifact is damaged, complete an **artifact damage form** and leave it with the Curator or Registrar, who will ensure that a copy is filed in the object's accession file.
- Minimize staff and visitor exposure to dangerous objects. Examples include objects constructed with lead-based materials, early taxidermic mounts and furs (which often contain arsenic), and artifacts harbouring molds.

- If an artifact poses a health or safety hazard, all personnel who might handle the object must be made aware of the dangers it poses, and must take safety precautions when handling it (wear gloves, avoid prolonged exposure, etc.).

## **7.2 Guidelines for Artifact Storage**

- Collections storage should be located away from activity and high-traffic areas.
- When storing artifacts containing special materials, please consult a collections management or curatorial manual to learn how best to meet the object's special needs.
- Don't store cleaning materials and office supplies with the collection.
- Choose a safe place for storing objects – never place under a water pipe or potential leak, and avoid direct sunlight where possible.
- Keep lights off, draw blinds, and close cabinet doors when the storage or exhibition area is not in use.
- Humidity and temperature fluctuations can be damaging to artifacts, and should be prevented wherever possible.
- Most collections can be properly stored in closed cabinets or on open shelves with light and dust covers, preferably shelves painted by electrostatic process (to avoid solvent and paint off-gassing). Place an acid-free paper cover between artifacts and painted or metal surfaces.
- Shelves can be numbered for location and inventory records.
- Textiles should be stored flat, rolled on cardboard cylinders, or folded with padding to prevent creasing.
- Provide support for objects that could fall or tip.
- Wood storage containers and shelves should be lined with a vapor barrier (such as aluminum/plastic laminate or aluminum foil) and stored in a well-ventilated area.
- Although objects can be safely transported in standard packing materials such as newsprint, bubble wrap, microfoam, and Styrofoam packing peanuts, they should not remain stored in these materials for extended periods of time.
- Storage materials to avoid:
  - Many standard paper products (office papers, paper towels, cardboard) – can be highly acidic and damaging to artifacts or documents.
  - Cellophane or masking tape – the adhesive stains
  - Cotton batting – may catch on rough textures and be difficult to remove
  - Foam rubber and urethane foam – fumes are flammable and cause some materials to deteriorate
  - Metallic paper clips – can rust and stain documents
  - Nail polish remover – can have an adverse chemical reaction with some objects (such as unglazed pottery and other porous materials.) Consider this when using nail polish for numbering artifacts.
  - Plastic wrap, bags, etc. – can contain damaging compounds, and materials wrapped in airtight wrap may mold
  - Rubber bands – crumble and may stain

- Rubber cement – stains
- White glue – irreversible
- Wood products – can produce damaging acids
- Recommended storage materials:
  - Acid-free paper products (including tissue paper, writing and photocopy paper, file folders and archive storage boxes)
  - Cotton or linen fabrics and threads, washed first to remove residual chemicals. Unbleached cotton works best. Fabrics should be washed with pH balanced laundry soap, or with regular soap, adding a small amount of vinegar to the rinse.
  - Plastic paper clips – use with care to avoid distorting paper
  - Polyester batting
  - Polyester film (Mylar ®)
  - Polyethylene microfoam (Ethafoam ®) for drawer liners
  - Polypropylene bags
  - Adhesives based on methyl cellulose or wheat or rice starch (these are water soluble)

**Temperature, light, and humidity guidelines** (these are *optimum*, though not necessarily feasible, ranges):

- 45-60% relative humidity for most artifacts, 20-30% for films and negatives
- 20-22 degrees Celsius, fluctuating no more than 2 degrees in 24 hours
- No more than 50 lux or 5 foot candles of light for sensitive materials (textiles, works on paper, feathers, biological specimens)
- Halogen lights are safer for collections than are fluorescent lights.

### 7.3 Pest Management

For a storage environment to be safe for collections, it must be free from insect and other pests. The following measures will serve to reduce or eliminate risks from pests.

Note: The regular use of pesticides could be damaging to collections and should be avoided.

- KEEP FOOD AND DRINK OUT OF THE EXHIBIT AREA, and maintain the highest standards of cleanliness in food-preparation areas. Careful waste disposal and sanitation practices are essential to the well-being of the collection.
- Plug holes where vermin could enter. Set traps if necessary.
- Make regular visual checks for evidence of insect or animal pests.
- Store temporarily acquisitioned objects away from the collection, if there is a possibility they could harbour pests. House them in a different building if possible.
- If an object is suspected to carry pests, and will not itself be harmed by freezing, subject it to at least two cycles of freezing/thawing. Put the object in a clear plastic bag and place it near the centre of a chest freezer. One cycle = 72 hour freeze, 24 hour thaw.

#### **7.4 Risk Management**

Risk management strategies are under development and will be appended to this policies and procedures document. With a view to establishing a risk-management strategy, the KRHS will:

- Identify risks and assess the potential magnitude of each. Risks might include humidity, temperature, light and radiation, pollutants, criminal activity, fire, water, pests, or custodial neglect.
- Identify strategies to mitigate risks, and determine the costs and benefits of each strategy.
- Set priorities and develop a plan for the implementation of risk management strategies. In order of priority and desirability, general risk management strategies will include: (1) Avoiding the source (2) Blocking the agent (3) Detecting and/or monitoring the agent (4) Responding to the problem caused by the agent (5) Recovering from the problem, or treating the result of the problem.
- Review and revise specific risk management strategies on a regular basis.

#### **7.5 Security**

The KRHS will observe the following security procedures:

- The last volunteer or staff member to leave the Museum each day will follow a routine closing procedure.
- The door to the exhibit room should remain locked when not in use.
- All staff will remain vigilant to any changes or abnormalities in the exhibit space, storage facility and tearoom/workshop areas.
- Keys to the Museum will only be issued to designated personnel, and an accurate and current list of key-holders will be maintained.
- Security lights and/or motion-detector lights will light the entrances and grounds of the Museum.
- The KRHS will work closely with local fire and police services to install security and fire alarm systems and establish procedures for responding to fires or breaches of security.
- The KRHS will not insure its permanent collection.

### **8 DEACCESSION OF OBJECTS**

#### **8.1 Gravity of the Decision**

Once accessioned, an artifact acquires a status beyond that of museum property. It is held in public trust and cannot be disposed of without approval from all levels of authority within the KRHS, and then only after observing due process. Deaccession is the formal removal of an accessioned object from the KRHS permanent collection; a conscious decision on the part of the KRHS to stop caring for the object. While there are legitimate

reasons to deaccession, the decision must only be made after carefully weighing all ethical, legal, and public relations concerns. The public should feel assured that the KRHS considers deaccession a strategy of last resort, that it follows judicious criteria and procedures, and that it does not undertake the decision lightly.

In the case of a far-reaching crisis that threatens the Museum's ability to care for a significant portion of its collection, Museum personnel should initiate discussion about a possible deaccession event long before even identifying candidates for disposal. In such cases it can be far-sighted to involve the public in a dialogue about Museum resourcing issues, such as lack of space or funding, that have a direct bearing on the future of the Museum or might warrant a major deaccession event. The KRHS should also inform other local museums that there are certain objects which meet the criteria for deaccession and which might consequently become available to other interested institutions as a transfer.

## **8.2 Criteria for Deaccession**

An object approved for deaccession will fit one or more of the following criteria:

- The object is inconsistent with the Museum's collecting mandate.
- The object has deteriorated to such poor condition that it is no longer useful and further conservation or restoration will seriously threaten its integrity.
- The object is a duplicate, with no value as part of a series or subcollection.
- The object is a fake or forgery, with little research value as a fake or forgery.
- The object poses a direct threat to other artifacts in the collection, compromises the Museum's ability to care for other artifacts, or prevents the Museum from building its collections in accordance with stated goals.

Deaccession will only proceed if all of the following conditions are true:

- The object meets one or more of the criteria for deaccessioning.
- There are no legal impediments or moral objections to the deaccession and disposal of the object. The Museum must have clear, documented title to the object, otherwise ownership status may be in question and the object can not safely be considered a candidate for deaccession.
- The interests and reactions of the public have been conscientiously considered.
- The KRHS Collections Committee has, on the recommendation of the Curator, agreed that the object should be deaccessioned. This agreement will be documented in the minutes of the meeting, and may be demonstrated in a majority vote if unanimous agreement cannot be reached.
- The KRHS executive has approved the object for deaccession. This approval should be recorded in the minutes of the next meeting of the Society membership.
- Additional legal and third party advice has been sought where necessary (i.e. if the deaccession is part of a larger disposal program, or is likely to be controversial.)
- In the case of a forgery or fake, the object is not exchanged or sold except for

study purposes as a fake or forgery.

### 8.3 Procedure for Deaccession

For each artifact under consideration, the Curator will submit to the Collections Committee a written proposal for deaccession. This proposal should outline object source, provenance, history of use and a rationale for removing it from the permanent collection. All legal documents, photos, condition reports and curatorial files should accompany the proposal, and these should be used to satisfy the Collections Committee that there are no legal or ethical impediments to deaccessioning the object.

Note: It is **not** permissible to return a deaccessioned artifact to the original donor. Revenue Canada considers "return to original donor" a separate transaction conferring a personal benefit on a private individual. As such, it is to be avoided. (Returning an object to a donor possessing a tax receipt for the object could constitute grounds for revoking the museum's charity status.) However, the Curator should, as a courtesy, notify the original donor (or a family member) that the object is being considered for deaccession. Museums may allow the original donor to purchase the material at current fair market value.

If the Collections Committee agrees to the deaccession, the executive must approve the decision. Accession numbers are then removed from the object and it is disposed of (See section 8.4, Disposal of Objects). Finally, the object's accession file is labeled "deaccessioned" and maintained in the "deaccession" file, separate from the other accession files.

### 8.4 Disposal of Objects

The method of disposal will be one of the following, in order of preference:

- transfer to an educational lending or furniture/utility collection within the KRHS Museum
- transfer, sale or exchange to another non-profit public institution, such as a museum
- sale by public auction. Note: The Museum should be concerned about the public's reaction to the sale of objects which have been donated to them. Accessioned objects must **never** be perceived as assets that can sold when the Museum requires funds. If as a last resort it is decided that a deaccessioned artifact should be sold, the sale should not take place on the Museum property, and no one connected with the deaccession process or decision should be involved in the purchase.
- destruction and/or discard. Note: The Museum should be concerned about the public's reaction to the destruction of objects. This method of disposal should only be used in cases where the artifact is hazardous or has deteriorated beyond value.

### **8.5 Repatriation and Requests for Return**

The KRHS Museum will treat on a case-by-case basis any request for repatriation or return of culturally sensitive objects. Such requests will be given the highest attention possible until resolved through cooperation with the cultural group in question. After considering all available information and documentation, the KRHS Museum must be satisfied that the cultural group's claim of historical relationship with the object(s) is well-founded and demonstrable.

## **9 COMMUNITY RESOURCE REFERENCE LIST**

This section will be a perpetual work-in-progress, listing informational resources and contact details for professional services as they are identified.

- security
- appraisers
- historians
- conservators

### **Web Resources**

Canadian Heritage Information Network (CHIN)

<http://www.chin.gc.ca/English/index.html>

Canadian Museums Association

<http://www.museums.ca/>

Archives Canada

<http://www.archivescanada.ca/english/index.html>

Public Archives of New Brunswick

<http://archives.gnb.ca/Archives/Default.aspx?L=EN>

Archives Association of British Columbia "Describing Archival Material"

[http://aabc.bc.ca/aabc/msa/5\\_describing\\_archival\\_material.htm](http://aabc.bc.ca/aabc/msa/5_describing_archival_material.htm)

## **10 GLOSSARY OF TERMS**

### **Accession**

*Verb.* To formally document or register an acquisition. This process brings an object under the management and responsibility of the KRHS Museum.

*Noun.* All artifacts or documents obtained at a given time from a given source, and accessioned into the KRHS Museum collection. Accessioned objects have a status

beyond that of Museum property and can only be disposed of through formal deaccession.

**Accession (master) file**

The primary file associated with any given object that has been accessioned into the collection. It contains all relevant documentation: forms, receipts, photographs, notes, minutes, etc. pertaining to that object.

**Accession number**

A permanent and unique number given to each artifact in the Museum's collection.

**Acquisition**

*Verb.* To transfer the legal ownership of an object to the KRHS Museum.

*Noun.* An object which has been deemed by the KRHS to fall within Museum collecting objectives and for which clear title has been obtained by the KRHS Museum.

**Administrative files**

Accessions records, donor reference files, KRHS minutes, and other documents pertaining to the execution of Museum activities.

**Appraisal**

The process of determining the monetary value of artifacts for taxation purposes.

**Archives**

Non-current and non-published printed, manuscript, audio or film material. Archive material includes, but is not limited to, correspondence, diaries, notebooks, registers, maps, plans, photographs, film, video and audio recordings, drawings, and charts. Archives may, on occasion, include published works. School textbooks are generally *not* considered archival material.

**Artifact**

(Also spelled "Artefact") An object created or shaped by human craft; especially something of historical interest.

**Bequest**

Offer of artifacts or funds passed to the KRHS through a will.

**Collection**

The set of historically significant artifacts permanently acquired by the Museum.

**Collections Committee**

A body consisting of no fewer than three and no more than seven Society members, including the Museum Curator and at least one member of the KRHS executive. Members are nominated and appointed at each annual meeting of the KRHS and serve for one year. The primary duty of the Committee is the assessment of artifacts for acquisition (whether through donation, trade, gift-in-kind, transfer from another institution, salvage,

or purchase), and the assessment of artifacts for deaccession and disposal. Additional duties include acting in an advisory capacity to other Society members about the use and preservation of the collection, regularly reviewing and refining collections policies and procedures, and encouraging donations from the public by promoting the fact that the Society welcomes donations and will preserve and exhibit them in a responsible manner.

**Conservator**

A professional trained in the repair and long-term care of artifacts.

**Curator**

Responsible for the care and exhibition of all objects in the KRHS's research and permanent collections, the implementation of collections management policies and regular communication with the broader Society regarding the Museum collections. The Curator conducts and coordinates research on accessioned objects and historical context. He or she is appointed by consensus at an annual meeting and renewed at the discretion of the KRHS. The position is part-time and volunteer.

**Deaccession**

The formal process used to permanently remove an object from the KRHS Museum's collection. Disposal by various means generally follows the deaccession decision.

**Disposal**

The act of physically removing a deaccessioned or unaccessioned object from the Museum.

**Gift**

Ownership of an artifact passed to the KRHS through a donation. Documented in the **gift agreement** form.

**KRHS**

Keswick Ridge Historical Society, established in 1999.

**KRHS Museum**

The Keswick Ridge Historical Society Museum, managed by the Keswick Ridge Historical Society, consisting of the Keswick Ridge Superior School and McKeen's Corner Store buildings.

**Master (accession) file**

The file associated with any given object that has been accessioned into the collection. It contains all relevant documentation: forms, receipts, photographs, notes, minutes, etc. pertaining to that object.

**Master log**

The book in which each acquisition of the KRHS is initially registered. It contains the object's name and number, and the date of acquisition.

**Permanent collection**

The whole of the historically significant objects accessioned by the Museum.

**Provenance**

The history of ownership and use of a particular object.

**Registrar**

Responsible for the management of all records relating to the KRHS collections, and jointly responsible (with the Curator) for organizing the archival collection. He or she assigns accession numbers and maintains a file for each object in the permanent collection, documenting its accession, exhibition, use and movement, both within and outside the Museum. The Registrar is appointed by consensus at an annual meeting of the KRHS. Every two years thereafter, the Registrar's term will be reviewed and renewed at the discretion of the KRHS. The position is part-time and volunteer.

**Research collection**

Informational printed resources that are current, or are reproductions of period materials, including photographs. The research collection is stored separately from the artifact and archival collection and serves to educate both staff and visitors about the collection and its broader significance.

**Staff**

At the KRHS Museum, "staff" will include all volunteer, full-time, and part-time Museum workers.

**Temporary receipt**

A written acknowledgment that an artifact has been physically delivered to the KRHS Museum. The temporary receipt serves to document objects which will remain in the temporary custody of the Society until an assessment can be made by the Collections Committee.

**Volunteer Coordinator**

Responsible for managing all volunteer resources relating to collections management at the KRHS. The Volunteer Coordinator may be the Curator, Registrar, or other KRHS personnel. He or she is appointed by consensus at an annual meeting of the KRHS. Every two years thereafter, the Volunteer Coordinator's term will be reviewed and renewed at the discretion of the KRHS. The position is part-time and volunteer.

**Volunteers**

Responsible for collections management activities as determined by the Volunteer Coordinator. This may include exhibit design, documentation, research and artifact care.