



Report to: General Committee

Date Report Authored: February 8, 2012

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**SUBJECT:** Markham Museum Collection Management Policy  
**PREPARED BY:** Cathy Molloy 905-294-4576 ext 24

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**RECOMMENDATION:**

1. That the report entitled Markham Museum Collection Management Policy be received;
2. And that Council approve the revised Markham Museum Collection Policy (appendix A) recommended by the Friends of Markham Museum and Staff.
3. And that the Museum Curator maintain the authority to sign gift agreements and other routine legal documents pertaining to collection management.
4. And that Staff be authorized and directed to do all things necessary to give effect to this resolution.

**PURPOSE:**

The purpose of this report is to inform Council of changes made the Collection Management Policy and to request approval of the revised policy.

**BACKGROUND:**

The revised Collections Policy was written and endorsed by the Friends of the Markham Museum. Staff request Councils' approval of the revised Collection Policy in order to comply with Provincial and National standards for grant requirements, and to collect artifacts and documents that represent a broader history of Markham.

Markham Museum receives an annual grant from the Provincial Government, Ministry of Tourism, Culture and Sport of about \$50,000. In order to receive this and other grants Markham Museum needs to comply with a series of standards. One of the standards pertains to collection care and management. A component of that standard is that the collection is supported by a policy that is relevant to the program direction and complies with International, National and Provincial museum standards.

In 2004 Council endorsed a Museum Master plan and in 2006 Council endorsed a Collection Management Policy relating to that plan. In 2008 Markham Museum reinterpreted components of that Master Plan to comply with our new program direction of:

*The Museum connects the history of Markham to today's new 'settlers' by examining our environment and the tools we use to adapt to our changing world. The 25-acre Museum site offers: exhibits, school programs, public programs and events, private event venues and research facilities.*

The Museum has experienced significant growth and community engagement with this new program direction. The revised Collection Management Policy describes current

staff positions, the expertise of whom is required to interpret the site with this new program direction.

**OPTIONS/ DISCUSSION:**

The 2012 recommended Collection Management Policy differs from the previous version in the following ways:

- Changed details of current Museum staffing positions to reflect the fact that we have professional collections management staff in addition to the Museum Manager
- Changed the committee appointed by Council from Advisory Board to The Friends of the Markham Museum
- Eliminated procedural details that are standard museum operational practice and process, this and other edits of redundant information resulted in the document being reduced from 35 to 24 pages
- The report still has the same basic outline and table of contents.

**FINANCIAL CONSIDERATIONS AND TEMPLATE: (external link)**

None

**HUMAN RESOURCES CONSIDERATIONS**

None

**ALIGNMENT WITH STRATEGIC PRIORITIES:**

**Growth Management:** The revised Collection Management Policy reflects current Museum operation. Markham continues to grow and change at a rapid pace. The new Museum program direction has enabled the Museum to adapt; the revised Collection Management Policy supports the new direction.

**Environment:** the revised Collection Management Policy supports the components of our program direction related to our relationship to our changing world.

**BUSINESS UNITS CONSULTED AND AFFECTED:**

Not applicable.

**RECOMMENDED**

BY:

  
John Ryerson

  
Brenda Librecz

**ATTACHMENTS:**

Markham Museum Collections Management Policy



## Collection Management Policy

Policy Category:

Policy No.:

Implementing Procedure No.:

**Approving Authority:**

Council

**Effective Date:**

*(Date of this policy has been approved to become effective)*

**Approved or Last Reviewed Date:**

2006

**Next Review Year:**

2017

**Area(s) this policy applies to:**

The archival and artifact collection of Markham Museum

**Owner Department:**

Culture

**Related Policy(ies):**

- All Museum policy

Note: Questions about this policy should be directed to the Owner Department.

### 1. Purpose Statement *(Outline why the organization is issuing the policy and its desired effect or outcome of the policy)*

It is through genuine artefacts, specimens and historic documents that the Markham Museum preserves and relates all aspects of Markham's History. The collections of any museum are its distinguishing characteristic. The responsibility to safely hold and account for museum collections is considered a public trust obligation by professionally operated museums. Guided by the Museum's Mission, Vision, Purpose and Mandate, collections are acquired, documented, researched, conserved and stored.

The intent of this document is to define the professional and institutional standards by which collections may be acquired, maintained, utilized and in some cases, disposed.

### 2. Applicability and Scope Statement *(Who and what this policy applies to and/or affects)*

This policy applies to the artifact and archival collection of the Markham Museum.

### 3. Background *(Indicate any reasons, history, and intent that led to the creation of the policy)*

The collection policy is the back bone of the Museum purpose and required for Provincial and Federal granting purposes.

### 4. Definitions *(If applicable, define any terminology or interpret meanings of a general term)*

**Town Council:**

Shall mean the Council of the Corporation of the Town of Markham, acting in their capacity as the Town Council or in their role as the regular (voting) members of The Friends of The Markham Museum.



## Collection Management Policy

Policy No.:

Implementing Procedure No.:

<b>Museum:</b>	Markham Museum.
<b>Museum Board:</b>	Shall mean the Board of Directors of The Friends of The Markham Museum
<b>Chair:</b>	Chair of the Board of Directors of The Friends of The Markham Museum.
<b>Museum Manager:</b>	The Manager of the Markham Museum, referred to as the 'Manager' in this policy
<b>Collections Coordinator:</b>	Town Staff responsible for coordinating the curatorial functions as defined by the Provincial accreditation requirements for Community Museums. The person responsible for the organization, storage, care, conservation and records management services for the permanent collection.
<b>Discipline:</b>	A recognized field of human knowledge wherein evidence is systematically collected, studied, documented and interpreted by professionals specializing in that field according to principals and procedures generally accepted within the field, i.e. archaeology.
<b>Accession:</b>	A process for documentation of a specimen or collection of objects; commonly indicates that an artefact or specimen is received into the Museum's stewardship permanently
<b>Acquisition:</b>	An object (artefact, specimen or document) added to the collection via the accession process.
<b>Deaccession:</b>	A process for identification and removal of objects from the Museum's permanent collections.
<b>Registration:</b>	Function and processes to ensure documentation of all movements and other significant change in status of materials in the Museum's collection including receipt, accession, deaccession, loans, use of objects in display, tracking changing locations observed change in condition and conservation treatments.
<b>Catalogue:</b>	To assess and document objective physical attributes, cultural, historical, categorical context, chain of ownership of specimens or elements of a collection according to accepted curatorial and discipline standards.
<b>Accepted Museum Standards:</b>	To carry out Museum specific tasks according to generally accepted criteria for quality of documentation, care, handling and conservation such criteria or standards established by provincial, national and international museums associations and institutes.
<b>Historical Significance:</b>	Determining the historical significance of objects is largely dependent on the accompanying provenance, oral history or other data available. Accepting secondary source accounts of artefacts direct association with a particular geographic location, personality, historical period or occurrence is subject to the evaluation and judgement of veracity of the Collections Coordinator (Curator).

**5. Policy Statements** *(Detail the specific regulations, requirements, or modifications to organizational behaviour to be addressed by this policy)***.1 Objectives of the Collections Management Program**

- To determine what to collect through establishment of clear criteria;
- To document the ownership of collections in the care of the Museum.
- To identify and catalogue each object or specimen according to their natural or functional groupings.
- To maintain a reliable inventory of collection. To capture all useful data relevant to objects or specimens in the collection and that such documentation is verified, professionally recorded and preserved as being of importance equal to the specimens and artefacts themselves.
- To encourage and assist scholars, staff and visitors to use the collections for research, education and entertainment.

**.2 Administration****Location:**

The collections management and research functions are provided with the best space possible with the resources of the Museum.

**Personnel:**

- The Museum Manager oversees the Collections Program as part of his/her overall responsibility for operations and serves as the primary contact between staff and the Museum Board.
- The Collections Coordinator is responsible for implementing the Collections Management Policy.
- The Collections Coordinator is responsible for a cost centre called 'Curatorial Services' through which ongoing collections management functions are funded in addition to basic site and building maintenance.
- The Collections Coordinator is supported by a team of full and part time staff.

**.3 Professional Staff Assistance for External Collections Management**

Museum staff may upon the Manager's approval, assist other organizations or individuals to catalogue or otherwise document specimens and materials to further the goals of the Markham Museum as stated in the Mission, Vision, Mandate and Purpose Statements. Copies of the resulting research and/or documentation may be kept by the Museum.

**3.0 Collections Development**

Within the context of the Museum's long range collections development strategy Museum professional staff will plan, prioritize and execute acquisition of materials according to accepted museum standards of practice.

Detailed descriptions of the major components of the collections, general criteria for evaluation of collections and strategic development priorities will be outlined and contained in a procedural manual

(entitled the "Collections Development Strategy"). Based on size and specific attributes of each type, the manual will be divided into three sections: Artefacts, Archaeology & Specimen collections, Archives & Library Collections and Architectural & Site Features collections. The Collections Development Strategy shall be developed by the Collections Coordinator, in consultation with the Museum Manager and Collections Committee of the Museum Board, and may be amended from time to time.

## **.1 Collections Classification**

The collections directly managed by the Markham Museum are divided into three distinct categories:

### **Permanent Collections**

- Objects and specimens classified as 'permanent' are the most historically significant, generally irreplaceable, are complete and in good condition, and for which provenance or locality is well documented. Permanent collections are collected with the intent to hold the material in perpetuity according to accepted museum standards.

### **Working Collections**

- Objects and specimens comprising 'working collections' are employed in public programs. These programs require objects that can be operated or handled by staff, volunteers and the public, and that ultimately may be expendable. The designation of 'Teaching Collection' indicates that while due care will be given for the care of the items, during the course of their use they may be consumed.

The working collections may also include objects accepted by the Museum on a time limited basis on behalf of a research partner. All working collections objects will be registered and specially designated to support the results of a particular piece of research or analysis. These collections will be drawn into the main collections or dispersed at the conclusion of a specific project in discussion with the research partner.

### **Other Collections**

- The Town of Markham may enter into agreements with third parties, typically loan agreements or fee for service collections management agreements, wherein the Museum will specify the level of care relative to the two general categories described above. Proposals from third party cultural or museum organizations for the Markham Museum to hold artefact and/or archives collections owned by a third party must be approved by Town Council.

## **.2 Objectives for Collection and Acquisition of Materials**

To maintain and increase the quality of individual artefacts held in the Museum's collection through the application of strategic principles and selection criteria. The criteria for selection of objects to be acquired will generally be:

- Relevance to the history and culture of Markham as defined in the Museum's mandate
- Relevance to public programming
- The condition of the object and the long term cost of stewardship
- Availability of human and financial resources to acquire, document, preserve, store and exhibit the artefact or specimen to the standards set in this document.
- Opportunities for use, exhibition, research and other program requirements.

- Physical condition
- Cultural sensitivity
- Oral and written documentation to support ownership, authenticity, study and use.
- Absence of threats to users or to other elements of the collection (does the object contain toxic substances).
- Absence of restrictions on use or disposition.
- Compliance with other applicable legislation and regulations.

### .3 Roles of Professional Staff & Museum Board in Acquisition and Deaccession of Collections:

Proposals for acquisition and deaccession of collections objects are developed by the Collections Coordinator.

- The Collections Coordinator is authorized to complete acquisitions of objects valued up to \$1,000. The Coordinator will inform the Collections Committee at their meetings and this report will be provided to the Museum Board.
- The decision to acquire single objects with an appraised value of more than \$1,000 will be made by the Museum Board on the recommendation of the Collection Committee.
- The proposed acquisition of collections from a single source valued above \$100,000 must obtain the prior approval of the Museum Board and Town Council.
- The final decision to acquire any historic structure offered for sale or donation to the Museum will be made by Town Council.
- The Museum shall not purchase or accept any donations or bequests of real property without the prior approval of Town Council.
- All recommendations for deaccession of all objects registered in the Permanent Collection are subject to the prior approval of the Museum Board and Town Council.
- All recommended policy variances, changes in policy and material issues related to the management of Museum collections must be approved by Town of Markham Council.
- Proposed use of funds from The Friends of the Markham Museum acquisition fund to acquire objects for the collections are subject to the same conditions as the other funds held by the Museum Board in accordance with the Memorandum of Understanding between the Museum Board and Town Council.
- The Museum Board must approve any acquisition that, in the opinion of the Manager, could become controversial.

### .4 Methods of Acquisition

*Artefacts and specimens are acquired through field collecting, gift or bequest, purchase and exchange; some collections are acquired as in-house creations and objects found in the collection (previously unregistered objects discovered in the collection).*

**a) Field Collecting**

Specimens or artefacts may be collected by Museum staff, or by others acting on behalf of the Markham Museum.

**b) Gift or Bequest**

A gift or bequest may be accepted from any source, including a staff member.

**c) Purchase**

Artefacts or specimens may be purchased from any source without restriction except from the following:

- A member of Town Council, Museum Board, staff, volunteer or research associate of the Markham Museum;
- Family members and friends of the above or;
- An organization in which an individual belonging to one of the above groups has an interest.

Acquisition from any of the above will require the approval of the Museum Board. In such cases the Markham Museum will establish a purchase price that reflects fair, appraised market value, with strict adherence to ethical guidelines.

**d) Exchanges and Transfers**

The exchange or transfer of artefacts or specimens in order to improve the collection may be arranged by the Collections Coordinator with the approval of the Museum Board provided that the transfer meets the following criteria.

- Both parties are in full agreement with the terms and conditions
- Both the acquisition and the disposal of artefacts or specimens are documented for the permanent records.
- The removal of the object will not impair the existing collection.
- The removal will be approved first through the deaccessioning process.

**e) In House**

Objects created in house or used within the Markham Museum as a functional object may be subsequently accessioned into the collection.

**f) Found in the Collection**

Non-accessioned objects that have been treated as artefacts or specimens over time but for which registration documentation (receipts, gift agreements etc.) cannot be found are designated 'found in the collection'. Following a reasonable effort to establish the identity of the donor, these objects will be accessioned if approved through the acquisition review process.

**g) Objects Brought in for Examination:**

The Museum staff may examine objects for visitors or other agencies free of charge for identification and authentication, but not appraisal. Examination is permitted by appointment only. When leaving objects for any period of time, a written request for identification must be completed and signed by

the owner of the object as part of the registration process. Objects brought in for identification will be considered abandoned if not retrieved within three months of the first date of acknowledgement of identification. Following a warning by registered mail, objects deemed abandoned will be treated as the property of the Museum and may be accessioned or disposed of. These requirements must be understood and agreed upon by the owner before signing the request for identification. This requirement was initiated in order to prevent reclamation of property that has been housed for long periods of time in the Museum. The Museum waives all responsibility for loss or damage to objects during their stay in the Museum.

#### **.5 Appraisals and Tax Receipts**

Donations to the Museum may be tax deductible as a charitable contribution for the fair market value of the property as determined by an appraisal, receipt or other valid documentation. The Town of Markham has developed a detailed policy for issuance of tax receipts that will form the basic guideline for the Museum Board in respect of donations of property and cash.

- The Collections Coordinator is recognized by the Canada Revenue Agency as an appraiser for material valued up to an estimated value not exceeding \$1,000.
- The appraisal for a gift in excess of \$1,000 will be undertaken by an appraiser acting at arms length from the Markham Museum and the Donor. The cost of an outside appraisal for income tax purposes will in most cases be borne by the Markham Museum, as financial resources permit
- Application for certification as Cultural Property for income tax purposes may be made by the Museum's staff for artefacts and specimens that appear to be of outstanding significance and national importance.

#### **.6 Deaccessioning Collections**

Museums exchange or dispose of specimens or objects in the interest of improving the collections or when items no longer have relevance for the Museum's purposes. As described in more detail below, primary consideration will be given to transferring the objects to another tax exempt, public institution wherein they may serve a valid purpose in research, education or exhibitions. Under no condition will the Museum remove from the public trust by sale or any other means, an item, man-made or nature-formed, which is of prime historical, cultural or scientific value.

#### **.7 Assessment of Objects for Deaccessioning:**

The following are criteria and constraints for use in evaluating objects:

- a) Objects registered in the Permanent Collection should be retained permanently if they continue to be relevant and useful to the Museum's purposes and activities and if they can be properly stored, preserved and used. Objects that in the judgement of the Collections Coordinator, do not meet the basic criteria for retention as described above and are not aligned with the relevant Collections Development Strategy and this recommendation is supported by concurrence from the Museum Board and Town Council may be considered for removal from the collection.
- b) Objects that are registered in the Working Collections categories do not require a formal evaluation prior to deaccessioning and may be removed from the collection without Museum Board and Town Council approval.

- c) Objects that do not fit within the Museum's mission, vision, mandate and purpose statements
- d) Objects of significant regional or national historical, cultural or scientific value whose care and conservation is beyond the means of the Markham Museum.
- e) Duplicates of artefacts that are historically significant; objects that are not suitable for research, exhibition or loan.
- f) Unknown origin of an object found in the collection or objects that are incompletely documented such that the Museum's ownership of the object is in question.

The evaluation of the object will be directed by criteria contained in the relevant section of this Collections policy and/or the relevant Collections Development Strategy; findings will be documented in writing for review by the Collections Committee, Museum Board and Town Council.

## .8 Working Collections

Objects or specimens recommended for deaccessioning but retained for use as part of the Working Collections will be retained so long as they suit the intended purpose. The identification numbers will be changed to reflect the change in status according to established registration procedures.

Objects acquired by professional staff for term research projects will be disposed of by the approved methods at the discretion of the researcher.

## .9 Ethical and Legal Considerations:

- a) In addition to proper records management and inventory control (registration processes), the disposition of deaccessioned artefacts must be handled with great care in order to meet the fiduciary responsibility of the Museum and the policies of the Town of Markham in respect to disposal of surplus assets (contained in Purchasing Bylaw). In order to avoid negative public perceptions the Museum must be prepared to describe clearly why in the interests of competent and ethical collections management the deaccessioning is being undertaken. The Museum therefore will not acquire objects with the definite intention of eventual disposal. For example, for the purpose of selling or trading.
- b) The staff must obtain the consent of the Museum Board and Town Council before any of the Museum's deaccessioned Permanent Collections are sold or otherwise disposed of.
- c) The staff must ascertain that no legal restrictions or conditions are attached to a donated object considered for deaccession.
- d) Objects 'found in the collection' that are not or incompletely documented such that the Town's ownership of the object is in doubt will be listed in an advertisement in the local newspaper with a notice informing possible owners that written claims of ownership (supported by documented proof of ownership) must be received by the Manager on behalf of the Museum Board and the Town of Markham within a specified time period. Photos, available documentation and or the actual object will be made available for inspection by potential claimants during regular business hours during the notice period. If satisfactory evidence of ownership is produced the object will be returned to the claimant subject to approval of the Museum Board.
- e) Staff must keep full accounts of proceeds recovered from sales of objects. Town Council, Museum Staff, Museum Board Members and their immediate families may not purchase objects offered for

sale as this would constitute self-dealing.

- f) Any Museum identification marks or numbers must be removed prior to disposition.
- g) Registration records, correspondence and deaccession related records including the record of sale will be kept permanently.

#### **.10 Methods for Disposition of Deaccessioned Artefacts:**

- a) The Museum may advise the donor or a member of his/her immediate family as a gesture of respect. Disposition of materials originally bequeathed to the Museum require that the Museum consult with the executor(s) to avoid disrespect
- b) The disposition of deaccessioned objects will be by means of sale, trade or exchange, gift, the return of short or long term loans, and the intentional discard (destruction of an object that has lost its identity).
- c) The manner of disposition shall be in the best interest of the Town, the citizens of the Town of Markham and the maintenance of the Museum's public trust:
  - I. Every effort will be made to ensure that an object significant to the Markham Museum's mandated geographic area of responsibility, remain in that area.
  - II. That first consideration will be given to an institution that can provide the highest degree of care for or make the most appropriate use of the object. The above description usually refers to a public, non-profit organization with purposes similar to those of the Museum
  - III. It is assumed that the object was purchased or offered to the Museum so that the object would be accessible to the general public. Therefore, every reasonable effort will be made to place the deaccessioned materials with another Museum.
  - IV. Only after reasonable effort is made to transfer the object to a public institution will consideration be given to sell or otherwise transfer the object to a private entity or individual. All objects must be sold either at public auction or, as a third consideration, designated consignor or dealer. Advertising shall not make reference to Museum in the case of public sale except if in the judgement of the Manager such advertisement is of benefit to the Museum.
  - V. The proceeds from the sale of a deaccessioned object will only be used to strengthen the collections through strategic acquisitions; or may be applied to improving the conditions and management of remaining collections. Funds received will be deposited to the Museum Board's acquisition fund.
  - VI. All deaccessioned fossil and archaeological material must be delivered to a recognized institution for final disposition. If no qualified institution is willing or able to accept the object into its collection or undertake to assess and direct permanent disposition, ethical practise calls for the destruction of the object
  - VII. Ethnological Artefacts – Deaccessions from ethnology collections should be limited to very badly deteriorated or inauthentic objects.

## 4.0 Documentation

*The Markham Museum must register (accurately and thoroughly document) all of its collections, to fully realize the value and significance of all objects and to fulfil the Museum's stewardship role. Documentation is essential for collections development, research, preservation, and interpretation.*

*Documentation is the responsibility of the Collections Coordinator and the members of the department.*

### .1 Documentation Types

Documentation will include information in written, electronic, audio visual or graphic form, pertaining to the identity, locality, provenance, and transfer of legal title of artefacts, archives and specimens to any category of the Museum's collection. Documentation will also include information regarding significance, function, description, condition, and usage after acquisition.

### .2 Documentation of Condition

When objects are integrated into the Permanent Collection they must be described in sufficient detail to enable the detection of any deterioration. Any change in condition or treatment to an artefact or specimen will also be documented.

### .3 Documentation of Change of Status

Temporary or permanent change in the status of an artefact or specimen, such as an outgoing loan, deaccessioning, or transfer to a working collection, must be thoroughly documented.

### .4 Documentation Standards

Markham Museum will use accepted and consistent standards, methods and procedures to document collections. Documentation must be maintained in perpetuity.

### .5 Legal Documents

Legal documents dealing with acquisitions and deaccessions must be kept in hard copy form, with a duplicate set stored in a separate building. Copies of the electronic records stored in the Museum's electronic catalogue must be maintained offsite and backed up frequently

### .6 Freedom of Information

Some of the Museum's documentation is subject to restricted access due to limitations placed by the Municipal Freedom of Information and Protection of Privacy Act, and any other applicable legislation. The Museum will ensure that access to any documentation is consistent with the intent of this legislation.

### .7 Firearms

The Collections Coordinator is required to obtain a valid Possession and Acquisition Firearms License and keep it up to date. The Museum will pay for the Canadian Firearms Safety Course and licensing fees for staff requiring access to the collection.

All firearms must be registered and entered in the Museum's Firearms business ledger. The Certificate of Registration will be stored in this ledger. A copy of the Firearms Business Licence will be posted with the weapons collection.

The Museum will accept weapons provided they meet the criteria used to assess all prospective donations.



## Collection Management Policy

Policy No.:

Implementing Procedure No.:

The Museum will not keep live ammunition as part of the collection. When a firearm is placed on display, it will be secured in accordance with the standards of the Office of the Ontario Firearms Officer.

### **.8 Inventory**

Schedules for inventory and inspection of artefacts are determined by the relative sensitivity of the materials and the relative value in both historical and monetary terms. The Museum will conduct systematic inspections and inventory checks in order to spot losses and/or damage promptly and make timely efforts to recover objects in unsafe environmental conditions or to trace stolen or misplaced artefacts.

### **5.0 Preservation and Conservation**

The Markham Museum has a responsibility to preserve all its collections.

#### **.1 Responsibility**

The Manager is responsible for communicating the resource needs of the collections management program to the Museum Board and to Town Council.

The preservation and conservation of the Permanent Collections is the direct responsibility of the Collections Coordinator.

- a. Conservation includes creating the optimum environment in storage and on display, proper handling and security.
- b. Practices of care and preservation shall be consistent with the best available information. Specific advice should be obtained from a trained conservator, in cases where special attention is deemed necessary.
- c. Regular inspections for the condition of the Permanent Collection will be scheduled.
- d. Regular maintenance and cleaning will be scheduled for the collection facilities.
- e. The Museum's collection of sacred objects shall be stored, cared for and preserved in accordance with accepted procedures respecting the sensitivities of those individuals or organizations recognized by the Museum as having a legitimate interest in the care and handling of those objects.

#### **.2 Permanent and Working Collections**

Collections storage and display locations will receive the highest level of fire and security protection possible within the Museum's financial resources. Objects in the collection are covered under the Town of Markham's comprehensive insurance policy. Individual objects identified as having exceptional monetary value may require outside appraisal and separate insurance coverage.

#### **.3 Other Collections**

Insurance coverage for collections or objects not owned by the Museum will be covered under the lenders policy or through the Museum insurance policy as per agreement with the Museum Manager or her/his designate. All collections or objects that the Town agrees to extend insurance coverage, first must receive approval of the Town of Markham Finance department and the Town's underwriter.

#### **.4 Emergency Plans**

The Markham Museum will maintain an up to date and comprehensive emergency plan specifying both preparedness and response procedures to be followed in the event of an emergency. The Emergency Plan

will be developed by the staff, in consultation with the Museum Board. The Emergency Plan shall be reviewed annually.

## 6.0 Collections Use

The Markham Museum is committed to long term preservation. However, a balance must be struck between the preservation of the collection and its use for research, exhibition, educational, promotional, and commercial purposes. The Markham Museum acknowledges that access to and use of the collection, by staff and the public, increases risk to the collections and such access must be classified and appropriate controls invoked.

Access to the collection is provided through exhibitions, programs, events, publications, collections records, research files, visual resources and consultation with curatorial staff. Access to the collection will also be provided in accordance with the provisions and restrictions of the *Municipal Freedom of Information and Protection of Privacy Act*, or any other applicable privacy legislation.

The collections must be organized and managed in such a way that it is accessible for all purposes consistent with the Museum's Mission, Vision Mandate and Purpose.

### .1 Access to Collections

#### a) Staff & Volunteer Access to Collections

The level of staff access to collections is determined first by the category of collection, (permanent and working collections) where each collection has particular physical or cultural sensitivities to be considered. The decision to provide access to particular staff or volunteers is made by the Collections Coordinator. Any staff or volunteers who handle artefacts, archives and specimens must have appropriate training suited to the particular collections. Access to collections documentation is controlled by the Collections Coordinator through designation of a level of access to the collections catalogue database and paper record.

#### b) Public Access to Collections

The Markham Museum allows for a wide range of collections access by the public depending on the category and classification of the collection and the resources available to provide services. Access to historic structures is governed by the relative sensitivity of original building components. Access to some areas within historic buildings may be limited or restricted.

Admission and other access fees for use of the collection for commercial purposes are approved by Town Council in the Fees and Charges Bylaw. In keeping with the Markham Museum's educational mission, uses for non – commercial purposes carry a discounted fee structure.

### .2 Types of Access

Any agreement involving access and / or use of the collections must be documented in writing, signed by both parties and approved by the Manager or designate. The Markham Museum must be credited for any use of its collections.

The Manager and/or the Collections Coordinator make the decision whether to loan objects from the collections and the conditions of any loan. They are authorized to execute loan agreements on behalf of the Town of Markham.

**Physical Access** to collections is provided through exhibitions, programs, events and tours. Special requests for physical access are provided through loans, individual requests (i.e. archival research material) and fee for use situations.

**Intellectual Access** to collections is provided through records, images and other information that may be requested for publication, research, web sites, electronic media, display, promotional materials and advertising.

- Some artefacts and documents of a particularly sensitive nature may be accessible only to family members of the donor, at the discretion of the Collection Coordinator. Access to restricted items for family members will be arranged through the Museum's staff (fee applies).
- Access for research purposes will be arranged through staff, with researchers supervised by staff at all times when in the presence of the objects, documents, or media.
- All proposed uses of the Museum collections are subject to intellectual property and/or copyright restrictions and legislation. Fees for use are in accordance with the Town By-Laws.

#### **Other Determining Factors for Access**

- Condition of artefact or specimen
- Risk to the artefact or specimen
- Location and security
- Public health or safety risks
- Intended use; ethical issues
- Expertise of the requestor
- Human and financial resources required to fulfill request

### **.3 Research**

- a) Collection research is required in order to evaluate artefact categories and sub-categories to determine future collecting priorities or to determine where selective culling of artefacts by deaccession should occur.
- b) To aid cataloguing, research focussed on collection type will be conducted according to a pre-determined research plan.
- c) Collections research will be conducted to obtain quality, reliable data regarding descriptive, contextual and historical significance.
- d) Museum documentation relating to collections shall be available for reasonable public access except for categories of information designated as confidential by the Collections Coordinator or for which disclosure is prohibited by the *Municipal Freedom of Information and Protection of Privacy Act*, or any other applicable legislation.

Copies of vital documentation and records shall be kept in a secure location

### **.4 Exhibitions**

- a) Permanent and Working Collections may be used in exhibitions.

- b) All exhibitions are proposed to the Manager through a standard format that addresses the theme, objectives, background research, term, and interpretive plan.
- c) Conservation and security are a key consideration when any object is considered for an exhibition
- d) Risks to the collections and the proposed mitigation of those risks are a documented part of any exhibition proposal.
- e) The Collections Coordinator is responsible for determining whether and for what duration an object may remain on display
- f) Due to the nature of the Museum, outdoor exhibitions are periodically developed. Normally the Permanent Collections will not be used in this manner.
- g) No original archival materials from the Permanent Collection may be used in long term displays.

## .5 Interpretive Programs

- a) Only objects from the 'Working Collections' or those so designated by the Collections Coordinator may be used in hands-on demonstrations in programs.
- b) Interpretive staff handling objects used in demonstrations must communicate the type of care and handling that museum collections receive.

## .6 Museum Gallery Photographs

The Markham Museum permits photographs to be taken in the exhibitions. Excluded are those objects which are subject to copyright restriction. Also, images captured by visiting photographers may not be published without written permission from the Manager. If permission is granted, a fee applies and acknowledgment to the Markham Museum must be given in the publication. An agreement, if appropriate or required may be executed by the Manager on behalf of the Town.

- a) Subject to the approval of the Collections Coordinator, the Museum may make photographs of Museum collections available by reproduction to interested parties upon request for a fee. Information on each approved request is kept in a register and is subject to inspection by the Copyright Board.
- b) The Museum will not allow photography if deemed to cause damage to the artefacts, documents or works of art.
- c) The Museum will allow no photography of restricted collections.

## 7.0 Loans

All loans both to the Museum and from the collections to third parties shall be subject to the execution of a loan agreement. The Museum Manager and Collections Coordinator shall have the authority to execute loan agreements on behalf of the Town.

No objects are borrowed for long-term use from any other institution or individual without a review by the Manager and approval of the Museum Board.

Prior to accepting incoming loans the Museum must establish ownership.

The Collections Coordinator must ensure that all loans are fully documented including incoming condition

and any restrictions of use. The Collections Coordinator shall be authorized to execute incoming loan agreements on behalf of the Town. All incoming loans of significant value (over \$1,000) must be reported to the Museum's insurer.

a) **Incoming Loans -Guidelines:**

**Unsolicited material** left at the Museum, whether intended for donation or loan, must be considered to be on loan to the Museum.

The status of objects on **indefinite loan** from any source except an established Museum should be changed to either that of a gift or a loan with definite expiration or renewal date. Such a period should be sufficient to revise exhibits which may contain such material.

Any loan to the Museum requires a **written agreement** on the appropriate form, signed by the authorized representatives of the Museum. Persons authorized to sign loan agreements on behalf of the Town are the Manager or Collections Coordinator. A complete and detailed condition report must be completed immediately upon the receipt of the object.

Several options for insuring the object are available. The responsibility for **insurance** or a waiver of responsibility should be included on the loan form at the point of receipt. The lender of the object must supply an estimate of the value of the object and/or agree to an estimated value on the Loan Agreement.

Generally objects with modest monetary valuation will be covered by the existing Town of Markham comprehensive insurance carried by the Museum. However, some loans require special insurance arrangements which should be concluded prior to the object being delivered into the custody of the Museum. As deemed necessary the lender may be required to provide the necessary insurance naming the Town as additional insured.

All loans to the Museum should have a clearly stated **use and destination** (i.e. for display). Further, all loans should be for a specified term, indicated on the loan form. Permanent loans will be accepted only upon approval of the Manager and Museum Board. Objects left unclaimed for 90 days following expiry will, after reasonable efforts to contact the owner, be subject to storage and handling fees. Upon approval of the Museum Board and following a publicly advertised notice of sale, the objects will be sold to recover the Museum's costs.

b) **Loans from the Museum - Guidelines:**

The Markham Museum is mandated to provide artefacts for exhibitions and displays in a manner that will promote local heritage and scientific awareness and raise the profile of the Museum.

The Museum's own display program is the first priority. A second priority is Loans to museum and art gallery institutions within the geographic mandate of the Museum. Careful consideration will be given to prospective borrowers that are not public Museums or public non-profit galleries. Approval of the loan request will be conditional on the extent of public access to premises where the loaned material is displayed.

The Manager and/or the Collections Coordinator will assess the loan application and determine whether the loaned material could be expected to be returned in not substantially worse condition in addition to the above criteria.

Costs of transportation, care and handling, special insurance coverage will be borne by the borrowers

of the Museum's artefacts. Normally conditions of the out bound loan are included in a loan agreement that is executed on behalf of the Town by the Museum Manager.

Normally loans to public institutions are made without requiring a loan or rental fee. However administrative costs of preparing the loan may be charged along with all shipping and insurance costs. Collections objects loaned for use in a commercial setting generally require payment of an exhibition and processing fee.

The Manager and/or the Collections Coordinator shall have authority to approve loans which are for a term not exceeding one year. No loan will be made for a term exceeding one year except upon approval of the Museum Board. The Manager may approve extensions to loan agreements in force at the time of a request for extension for varying terms not exceeding one year.

## c) Permanent Loans

The Museum will not consider accepting permanent loans from individuals but may accept permanent loans from other Museums if the objects are directly related to a collecting priority or fill a gap in a category of artefacts in the permanent collection and cannot be obtained through donation or purchase. The above conditions are dependent on the overriding condition that the object have complete provenance, and documented association to local events, historical processes, persons or the geographic mandate of the Museum. Further, that the Museum in acquiring the material will accept no subsequent claim by the borrowing institution for maintenance or restoration costs.

## d) Collections Owned by Others

Collections and specimens belonging to other persons or institutions may be stored temporarily by the Museum only if and while it is in the interest of the Museum to do so and if the Museum is able to store them adequately.

Further, the objects must be a documented artefact, not replica material, at risk of damage or destruction and of significant local historical or scientific value. The Museum will hold collections and specimens owned by others only if a formal agreement exists between the Museum and the other party, captured on a loan agreement form but identified as a temporary custody arrangement..

The Collections Coordinator makes the decision whether to loan objects from the collections and the conditions of any loan and is authorized to execute loan agreements on behalf of the Town of Markham.

## 6. Roles and Responsibilities *(Outline roles and responsibilities of those involved in the implementation of the policy)*

### e) Roles of Professional Staff and Foundation Members:

Professional staff will evaluate loans to and from the Museum, complete the necessary documentation, maintain a well organized record keeping system and monitor loan terms. The Friends of the Museum will be required to evaluate and provide a decision on loans with special conditions attached on the loan that are considered outside the policy limits herein described.

The Collections Coordinator makes the decision whether to loan objects from the collections and the conditions of any loan and is authorized to execute loan agreements on behalf of the Town of Markham.