

Collections Management Policy

For the Tolstoi Holy Trinity Church Historical
Society Inc.

VERSION 1.1
6/20/2016

1.0 Statement of Purpose and Collection Objectives

A. Mission Statement

The mission of the Tolstoi Holy Trinity Church Historical Society Inc. (also known as the Society) is to restore the church and to collect, preserve and exhibit artifacts that represent the history of the church, the local Polish culture, and the community, for the education and enjoyment of our generation and those of the future.

B. Collecting Objectives

The Society collection consists of artifacts that were in the church at the time it was acquired by the Society and include religious articles, statues, furniture, books and documents. In addition the collection includes artifacts acquired by the Society which represent the history of the church, the local Polish culture and the community. The collection also includes the church building and the adjacent bell tower. The Society collects in two distinct areas: Church history and cultural history.

The development of the collection will meet both the immediate and long-term objectives of the Society. Development will build on strengths and address weaknesses of the collection as assessed by the Board of Directors and will take into account, current and future projects and needs. Collection strategies will include both planned and opportunistic approaches.

In developing the church history collection, the principal objectives are to acquire and preserve:

- Artifacts used by clergy and parishioners of the Tolstoi Holy Trinity Church during the church's history;
- Artifacts related to the administration of the church and parish during its active years.

In developing the cultural history, the principal objectives are to acquire and preserve

- Artifacts used by former church members during the church's active years which provide a glimpse into their daily lives

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- Artifacts related to the local Polish culture;
- Artifacts related to the history of the community of Tolstoi and the surrounding rural area.

The collection strategies of the Society will consider the interests of the Society and its members as well as the community.

The collections will be used for exhibit, collected for special study or for educational use.

C. The Society's Role

The Society will play a key role as a preservation and educational institution based on its collections. The Society will endeavor to maintain and protect all artifacts so that they will be preserved for future generations and may be utilized for the education of others, both young and old.

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2.0 Governance

The Society's Board of Directors, committees and staff/volunteers each play a role in helping the museum fulfill its role as stewards of its collections. The Board of Directors is ultimately responsible for the collection, and ensures that collection management policies, guidelines, procedures, and standards are development and implemented. The Board or anyone designated by the Board is responsible for ensuring that anyone who works with the collection is aware of the policies and procedures. Staff and volunteers must follow these procedures and standards in a consistent manner throughout the Society.

The Society's Board of Directors will:

1. Ensure that the scope of the collections are consistent with the museum's statement of purpose
2. Advise on priorities for collection development. These priorities should be reviewed every three years but are not limited to the following criteria:
 - a. Suitability of the collection to fulfill the mandate of the museum;
 - b. Suitability of the collection for exhibit and the needs of the artifacts;
 - c. Relevance of the collection to the community;
 - d. Ability of the museum to properly care for the collection; and the
 - e. Responsibility of the museum to its members and the community of Tolstoi.

The Society will establish a Collections Committee (comprised of Society officers and members) which will approve any additions to the collection. The committee will ensure it abides by the guidelines set by the Society including the priorities for collection development.

The Collections Committee will also ensure that the collection is inspected regularly for evidence of damage or deterioration. Any staff member or volunteer who discovers a preservation problem or damage to an artifact must document and report it immediately to the Committee or designate.

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Staff and volunteers will strive to maintain artifacts and collection records in an environment conducive to preservation. Standards vary according to the nature of the collection and display or storage conditions which will be described in the Society's *Collections Management Policy, Procedures and Guidelines Manual* (To be developed) *related to this policy*.

All staff and volunteers are responsible for maintaining the security of the collection. This encompasses loss or breaches of security. Staff and volunteers must document and report immediately any confirmed loss or breach of security to the Collections Committee or designate. In some cases, it may require that the police also are notified.

2.1 Ethics

The Society will follow *The Association of Manitoba Museums' Code of Ethics* that identify the standards by which the Society and its organization are expected to operate. The Society will strive to achieve the highest attainable standards for the collections within its care. It will follow policies, which are accepted within the profession, respecting acquisition and disposal of items pertaining to the Society, as well as avoid misuse and illegal activity. (See also the *Tolstoi Holy Trinity Church Historical Society Inc. Code of Ethics* policy document. To be developed.)

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3.0 Acquisition

The Society obtains artifacts through a variety of methods. Staff and volunteers must undertake acquisition in accordance with the highest professional standards and ethics. When an acquisition is considered the Society must make a serious, diligent, and documented effort to establish ownership. In the case of gifts or bequests, purchases, or exchanges, clear title must be transferred to the Society. Conditions cannot be attached that would limit the Society's use of the material, except with the approval of the Collection Committee. Conditions cannot be illegal.

3.1 Criteria for Acquisition

The Society will strive to acquire artifacts that generally are complete and in good condition, and for which provenance or locality is well documented. The decision to acquire an artifact will be based upon the following considerations:

- Relevance to the mission of the Society and to collection development objectives;
- Significance, such as association with an event, person, historical period, or geographic area;
- Representation of themes, processes, activities and cultural norms with community significance;
- Availability of human and financial resources to acquire, document, preserve, store, and exhibit the artifact;
- Opportunities for use, exhibition, research and other program requirements;
- Physical condition;
- Cultural sensitivity;
- Oral or written document to support ownership, authenticity, study and use;
- Absence of threats to users or to other elements of the collection;
- Absence of restrictions on use or disposition; and
- Compliance with other applicable legislation and regulations.

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3.2 Approval Process for Acquisition

Acquisitions are ultimately the responsibility of the Board of Directors. The decision to acquire an artifact will be made by the Collections Committee as delegated by the Board of Directors.

In some circumstances, acquisitions are taken to the Board of Directors for approval. These include:

- Any purchase of an artifact
- Donations or purchases of a potentially controversial nature (e.g. cultural sensitivity, negative public scrutiny)
- Acquisitions that require a significant outlay of resources, at the time of acceptance or in the future. (e.g. for storage, conservation, etc.)

The prospective donor or vendor must be issued a *Receipt for Artifacts and Specimens* (To be Developed) when artifacts are received by the Society.

A Gift Agreement or invoice must be signed to prove the transfer of ownership if the artifact is accepted. If the artifact is rejected, the owner will be notified and given 90 days to retrieve the object. If the owner does not retrieve the object within 90 days, it will be disposed of in accordance with the Society's guidelines and procedures, treated as abandoned property.

3.3 Methods of Acquisition

Artifacts are acquired through field collecting, gift or bequest, purchase, exchange and transfer. Some are also acquired in-house (found objects).

1. Field Collecting

Artifacts may be collected by Society staff, volunteers or others acting on behalf of the Society directly from their context in the field.

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2. Gift or Bequest

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

3. Purchase

Artifacts may be purchase from any source. However, purchase from a member of the Board of Directors, staff or volunteer including their family members or friends, or an organization in which the individual has an interest, requires the approve of the Board of Directors. In such cases the Society will establish a purchase price that reflects fair market value, with adherence to ethical guidelines.

4. Exchange

The exchange of artifacts between institutions is an established and useful means of developing and improving a collection. Exchanges may be arranged by the Collections Committee with the approval of the Board of Directors. Exchanges may be made provided that

- Both parties are in full agreement with the terms and conditions
- Both the acquisition and the disposal of artifacts are documented for the permanent records
- The removal of the object would not impair the collection in any functional way
- The removal will be approved through the deaccessioning process

5. Transfer

The Society may acquire artifacts from other museums or organizations. The transfer must be supported by documentation.

6. In-house

Objects created or used within the Society may be subsequently accessioned into the collection.

7. Found in the Collection

Unaccessioned objects that have been treated as artifacts over time but for which acquisition documentation cannot be found are designated “found in the collection”. These objects will be accessioned if approved through the acquisition process.

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3.4 Income Tax Receipts and Appraisals

Income tax receipts for artifacts, including those in a working collection, are available to all donors, including staff members, volunteers or directors. The receipt will reflect fair market value at the time of acquisition, determined by appraisal.

The Society will not issue a tax receipt before a *Gift Agreement* is signed. It is preferable that an appraisal not be undertaken before a *Gift Agreement* is signed as this action may ultimately reflect upon the reputation of the Society.

All tax receipts must be signed by the Treasurer, who must keep a copy of the tax receipt in perpetuity.

An appraisal for a gift with a fair market value of \$1000 or less can be provided by a qualified staff member or volunteer. When the value exceeds that amount, a qualified staff member or volunteer can appraise it if there is difficulty finding an independent appraiser, or if it involves unreasonable expense. Whenever possible, it is recommended that an appraisal for a gift with a value of more than \$1000 be undertaken by an appraiser acting at arm's length from the Society and the donor.

The cost of an outside appraisal for income tax purposes will generally be borne by the institution as financial resources permit. Otherwise the Society will negotiate with the potential donor.

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4.0 Documentation

The Society must accurately and thoroughly document the collection to realize its value and significance, and to fulfill the organization's mission. Documentation is essential for collection development, research, preservation, and interpretation. Documentation is the responsibility of the Collections Committee or other staff or volunteers as appropriate.

Documentation will include information, in written, electronic, audio visual or graphic form, pertaining to the identity, locality, provenance and transfer of legal title of artifacts in the collection and other related information regarding significance, function, description, condition and usage after acquisition.

While being integrated into the collection, each artifact must be described in sufficient detail to enable the detection of any deterioration. Any change in condition or treatment to an artifact will also be documented.

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

The Society will use accepted and consistent standards, methods and procedures to document the collection. Documentation must be maintained in perpetuity. Normally, documentation itself is not considered part of the collection.

Legal documents dealing with acquisitions must be kept in hard-copy form, with a duplicate set stored in an off-site location. Copies of electronic records must be maintained and stored off-site. Documentation should be maintained in a secure and stable environment.

While some documentation may be subject to restrictions (Privacy legislation), the Society should ensure that information about the collection is easily accessible to the public.

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5.0 Deaccessioning

There is a strong presumption against removing accessioned objects from the collection. However, the Society recognizes that there are circumstances when deaccessioning can refine the quality and improve the relevance of a museum's collection.

Deaccessioning must be undertaken in accordance with the highest professional standards and ethics, and must not be influenced by arbitrary taste or individual preference. Reasons must be ethical, defensible and objective. Deaccessioning must be undertaken with great scrutiny, and requires institutional review and approval from the Board of Directors to ensure a system of checks and balances.

The deaccessioned artifacts or specimens must be thoroughly documented along with the reasons for their deaccession and the processes involved. These records must be retained by the Society.

Any disposal of artifacts will be conducted in accordance with the Society's *Policy on Disposal* (To be Developed).

A concerted and documented effort must be made to keep deaccessioned objects in the public domain.

5.1 Criteria for Deaccessioning

Items may be deaccessioned for the following reasons:

- a) Failure of an artifact to meet the criteria of the Collection's Management Policy;
- b) Accidental loss or destruction of the artifact. If an artifact is in total disrepair, a professional conservator should be consulted to determine whether the artifact should be destroyed, and if so, how to do so safely and ethically.
- c) Return of items on temporary loan
- d) Sale to another museum or similar institution
- e) Trade or exchange to another museum or similar institution
- f) Gift to another museum or similar institution
- g) An artifact constitutes a physical hazard or health risk to staff or the public

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- h) The Society is incapable of providing the conditions necessary for minimum curatorial care
- i) An artifact has deteriorated or is damaged to a point where it does not serve a useful purpose or poses a perseveration threat to other elements of the collection or museum structure
- j) An artifact is a duplicate having no definable purpose (provenance and other documentation must be taken into account when determining duplicate status)
- k) An artifact is over-representative of a particular type in the collection (provenance and other documentation must be taken into account when determining an artifact is over-represented)

5.2 Process for Deaccessioning

The process of deaccessioning must be initiated with a written proposal supported by appropriate documentation and a recommended means of disposition. The proposal will be developed in consultation with the Collections Committee. The proposal must be approved by the Board of Directors.

The Society must create a public communication plan when an artifact has been recommended for deaccessioning. The plan must address the intent and circumstances of the decision to deaccession the artifact.

When a number of items are being considered for deaccession at the same time, a single proposal itemizing all items may be utilized.

5.3 Methods of Disposition

A demonstrated effort must be made to keep a deaccessioned artifact in the public domain by offering it to other museums or public institutions (as a gift or for exchange or sale) before sale to others. Consideration should be given to retaining the artifact within the community, province and then Canada, according to where it is most relevant. A member of the Board of Directors, staff or volunteers or their family members or business associates may not acquire through any means any artifact deaccessioned by the Society.

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When the Society chooses to deaccession an artifact, the committee may consider, as a courtesy, notifying the original donor (even though the donor no longer holds ownership).

The following methods may be considered for the disposition of an artifact:

- a) **Internal transfer** within the Society for non-collection use (e.g. training, props, destructive analysis, etc.)
- b) **Gift** to another museum, university or public institution
- c) **Exchange** with another museum, university or public institution
- d) **Sale** – The Society may sell deaccessioned material and should attempt, where possible, to establish a sale price based on fair market value. Disposition by sale, in order of preference, includes:
 - i) A museum, university or public institution
 - ii) The highest bidder at a publicly advertised auction sale, or by tender
 - iii) Reputable and established dealers
 - iv) Sale for scrap value
- e) **Destruction** – Disposition of an artifact by destruction will be permitted if
 - i) The object is hazardous or poses a danger to staff, the public or the collection
 - ii) The object has deteriorated or is damaged to a point where it does not serve a definable purpose
 - iii) All reasonable efforts have been made to dispose of the object through other methods

Two witnesses must be present to observe the destruction.
- f) **Return** – According to the Canada Revenue Agency, the Society cannot return an artifact to the original donor, whether or not a tax receipt was issued. An artifact may be return to the rightful owner if it is determined that the Society does not have legitimate ownership, or as a result of a repatriation process.

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6.0 Preservation

The Society has a responsibility to preserve its collection in perpetuity, with the exception of artifacts designated as a “working collection”. This includes artifacts in storage, on exhibit, used in programs and research, on loan, and in transit.

The preservation of the collection is the direct responsibility of the Collections Committee or designate, however; all staff and volunteers must share the responsibility.

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7.0 Use

The Tolstoi Holy Trinity Church Historical Society Inc. is committed to the long-term preservation of artifacts in the collection. However, a balance must be struck between the preservation of the collection and its use for research, exhibition, education, promotional and commercial purposes. The Tolstoi Holy Trinity Church Historical Society Inc. acknowledges that access to and use of the collection, by staff or volunteers and the public, increases risk to artifacts and requires appropriate controls.

Access to the collection is provided through exhibitions, programs, events, publications, collection records, research files, visual resources and consultation with staff. Any request to review parish records, acquired with the disposition of the church and its artifacts, to conduct family research will be considered. A *Request for Information* form must be completed which will include the specific information being sought. Privacy of personal information may result in the denial of a request.

The collection must be organized and managed in such a way that it is readily accessible for all purposes consistent with the goals of the Society.

Staff and volunteers who handle artifacts must be appropriately trained and supervised.

The Society may establish a working collection which would include objects that can be operated or handled by staff or volunteers and the public and that, ultimately may be expendable.

7.1 Public Use of the Collection

The Society allows limited use of its collection by the public. This may involve *physical* or *intellectual* access to the collection.

Physical access to artifacts and specimens is provided through exhibitions, programs, events, and tours. Other requests for physical access will be considered individually (e.g. loans, individual requests, and fee-for-use situations).

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Intellectual access to the collection through records, images, and other information may be requested for publication, research, web sites, electronic media, display, promotional materials, personal use, media, films and advertising.

Access to and use of the collection is at the discretion of the Collection Committee and is generally provided to any person who can demonstrate a need. Determining factors include:

- Condition of the artifact
- Risk to the artifact
- Location
- Security
- Health and safety risk
- Copyright
- Privacy of third party information (in relation to parish records)
- Artist's rights
- Intended use
- Expertise of the enquirer
- Human and financial resources available

The Society has the right to establish a fee for use of the collection.

Any agreement involving use of the collection must be documented in writing, signed by both parties, and approved by the Collections Committee.

Material may be acquired for education programs, exhibits, props, spare parts, or for purposes such as training or analysis. This material is not considered part of the collection.

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8.0 Loans

The Society may borrow artifacts for exhibition, study or other purposes consistent with the mandate of the Society and for a specified time period.

Loans are made to the Society by institutions and individuals. Items offered for loan to the Society will receive the same care and consideration as the Society's collections.

Incoming loans must be fully documented. The documentation will include one copy of the signed loan form and information relating to value and condition. These records must be retained in perpetuity. Establishing the value of the item for insurance purposes is the responsibility of the lender.

The Society normally lends artifacts to institutions. Loans are not normally made to individuals. The purpose of the loan must be consistent with the interests of the Society and not pose undue risk to the artifact. Loans are made for a specified time period.

The Collections Committee is responsible for ensuring that those who borrow or otherwise use material for any purpose are able to provide necessary care. Individuals within both the borrowing and lending institutions taking responsibility for the transaction must be authorized to do so. All loans from the Society must be approved by the Board of Directors.

Ingoing and outgoing loans must be fully documented. The documentation will include one copy of the signed loan form and information relating to value and condition. These records must be retained in perpetuity.

The Society reserves the right not to lend artifacts.

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9.0 Policy Review

This Collection Management Policy will be formally reviewed by the Tolstoi Holy Trinity Church Historical Society Inc. every four years. Amendments may be required at other times and must be approved by the Board of Directors.

Signed by Chairperson, Board of Directors

Tolstoi Holy Trinity Church Historical Society Inc.

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This policy was developed with information from the following sources:

Association of Manitoba Museums - Standards for Manitoba Museums (1995)

Collections Management Policy for the Nova Scotia Museum

Association of Nova Scotia Museums

Greater Sudbury Heritage Museums

University of Alberta Museums Collection Management

Canadian Museums Association

American Association for State and Local History

American Alliance of Museums

Royal Ontario Museum

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