



SIDNEY MUSEUM

Employee Handbook

2- COLLECTIONS POLICIES & PROCEDURES



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I. Collection Overview

Section: (2) Collections

Policy: Collection Overview

Effective: 13 April 2019

1. INTRODUCTION:

The Sidney Museum is a small community museum located in Sidney, British Columbia. The Museum collection constitutes an invaluable cultural resource with the ability to capture and engage the public with the history of the Saanich Peninsula. The archives, artifacts, digital images and oral histories that comprise the collection promote an understanding of the local communities and their role in the development of the culture, economy and way of life for the people of the Saanich Peninsula.

The scope of the collections at the Sidney Museum includes all aspects of human history on the Saanich Peninsula, beginning with the heritage of local WSÁNEĆ people, including but not limited to: Tsartlip, Tsawout, Tseycum and Pauquachin First Nations. Collecting will focus on cultural and social aspects of the area's history, featuring predominantly artifacts representing human activities and technologies.

As stewards of this collection, the Sidney Museum holds this resource in trust for the benefit of future generations while providing local, national and global publics with ways to access its collections.

2. MUSEUM VISION AND MISSION:

2.1 Vision: The Sidney Museum & Archives Society celebrates history and culture, and brings them to life. We aspire to create engagement through innovative experiences that are above and beyond traditional expectations. We create educational programs which connect generations and cultures.

2.2 Mission: The Sidney Museum & Archives Society is an organization that acquires, preserves and makes available the heritage, culture and interests of the Saanich Peninsula community.

3. DEFINITIONS

Acquisition – The act of gaining legal title to an object.

Accessioning – The formal process of recording an addition to the Museum’s collections; the process of transferring ownership and title of an acquisition to the Museum.

Deaccessioning – is defined as the process by which accessioned museum objects, collections, or archival materials are permanently removed from a museum’s collections.

Disposal – refers to the transfer or elimination of ownership by the museum, after the object, collection, or archival material has been deaccessioned.

Permanent Collection – Objects that are owned by the museum, that it has the responsibility to house and care for, and that may be used as the museum sees fit – most often for exhibition, loan, or study.

Unaccessioned Objects – Objects in the possession of the museum that have not been formally added to the museum’s permanent collection but still require storage and care.

Unclaimed Loan: An object that the museum records show was placed on loan for a fixed period or indefinite period, and which has not been retrieved by its owner in a timely fashion.

Undocumented Objects/Found in Collections Objects – Objects in a museum’s physical possession or control that are unsupported by any documentation and/or lack sufficient evidence to prove museum ownership.

Working Collection – Objects that are owned by the museum to be used according to their purpose for education, research or facilitating access to the Permanent Collection. For example, a VCR in the Working Collection may be used to play a VHS Cassette from the Permanent Collection, or a typewriter in the Working Collection may be used by the Education program.

II. Acquisitions

Section: (2) Collections

Policy: Acquisitions

Effective: 13 April 2019

1. PURPOSE:

The Sidney Museum acquires intangible and tangible material in a range of media for its collection. These acquisitions become part of the Museum's sub-collections to be used for display, research or educational purposes, to directly support the institution's mission.

2. POLICY:

Informing acquisitions is the Strategic Development Plan: a three-year plan which provides staff with overarching guidelines for Museum activity, as follows:

- High priorities for acquisition – those areas of the collection that are underrepresented, in terms of story, theme or chronology and in terms of the Museum's needs as they relate to its mission;
- Focus areas – particular stories, events, communities or significant individuals which require further development and scholarship; and
- Low priorities for acquisition – particular stories or themes within the collection that are adequately represented or overrepresented.

3. LEGAL AUTHORITY:

The Sidney Museum observes the laws of the Town of Sidney and the District of North Saanich, the Province of British Columbia, the Nation of Canada and International Law. The Museum abides by the International Council of Museums' Code of Ethics in all its practices and procedures.

4. RESPONSIBILITY OF STAFF AND VOLUNTEERS:

The Executive Director is ultimately responsible for the collection and with the Assistant Director ensures that collection management policies, guidelines, procedures and standards are developed and implemented. The Assistant Director is responsible for ensuring that anyone who works with the collection is aware of policies and procedures. Staff and volunteers must follow these procedures and standards in a consistent manner.

5. PROCEDURE:

5.1 Methods of Acquisition:

Acquisitions can be made using the following methods:

- Fieldwork
 - The Museum has an active fieldwork program oriented toward the gathering of oral histories and personal stories of local First Nations or settlers, their descendants, government officials, workers and others directly related to the Saanich Peninsula experience.
- Curatorial Purchase
 - Funding for collection acquisitions can come from annual budget allocations, special allocations for exceptional purchases or public donations and bequests without conditions. Purchases must reflect needs as identified in the Strategic Development Plan. Curatorial purchases will proceed according to the Museum's approved purchasing policy. Prior to any purchase, the Executive Director or designate will first take reasonable steps to determine whether it or a comparable item can be obtained via gift or bequest.
- Donation, Gift or Bequest
 - The Museum will encourage donations of intangible and tangible materials that it is actively seeking and have specifically targeted for acquisition according to its Strategic Development Plan. The Museum will not accept any donations that are conditional on the Museum committing to its display, or that are encumbered by any other conditions imposed by the donor except for those otherwise stated in this policy.
 - The Museum will not accept unsolicited donations of tangible materials except under extraordinary circumstances at the recommendation of the Assistant Director or if the unsolicited item has already been targeted by the Museum for future acquisition in its Strategic Development Plan. In both circumstances acquisition can only occur following approval of the Executive Director.
 - As a rule, the Museum will not accept miscellaneous items left at the site by anonymous parties as unsolicited donations. These will be reviewed on a case-by-case basis and those that are clearly intended for inclusion within the historical collection and are of exceptional historical value may be recommended for accession. Procedures will be implemented to dispose of unsolicited and unclaimed donations after a reasonable timeframe.

- When donations are accepted, each donor will be asked to sign and will receive a copy of a Gift Agreement/Deed of Gift, the original of which will be retained by the Museum, advising that ownership of the item has been transferred irrevocably to the Museum. Donations will not normally be accepted with “strings attached”. The exception to this condition being oral histories and related materials for which the Museum will respect the Terms and Conditions agreed to at the time of donation. The Museum will also make an exception for the negotiation of copyright permissions.
- Commission
 - Occasionally the Museum may commission a work of art for inclusion in an exhibition or use in a public program. Depending on the nature of the commissioned work and how it may align with the Strategic Development Plan, the Executive Director may recommend it for accession into the Museum’s collection.
- Exchange or Transfer
 - Acquisition of objects by exchange or transfer will be limited to materials from other libraries, galleries, archives or museums. Exchanges will be carefully considered so as not to negatively impact the overall strength and interpretive potential of the Museum collection. Approval will be based on the recommendations of the Executive Director. The Assistant Director will arrange the exchange or transfer of collection material following appropriate and accurate documentation.
- Found in the collection
 - Objects that emerge during collection management activities that lack documentation of their ownership are termed “found in the collection”. If staff is unable to ascertain ownership within a reasonable period of time, they may recommend that these objects be formally accessioned into the collection or disposed of.

5.2 Criteria for acquisition:

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

- Constitute an exemplary sample of an aspect of Saanich Peninsula history currently not represented in the collection
- Are in danger of loss or destruction
- Are directly relevant to current research, exhibit or interpretation programs
- Are well documented
- Are in good to excellent condition

Sidney Museum collects according to the following criteria:

- artifacts which are specific to the Saanich Peninsula including nearby islands, and Sidney or North Saanich in particular:
 - artifacts produced on the Saanich Peninsula;
 - artifacts related to historically important people, places and events on the Saanich Peninsula.
- artifacts which are typical of the Saanich Peninsula as a community in British Columbia, Canada and the international arena:
 - artifacts sold on the Saanich Peninsula;
 - artifacts used on the Saanich Peninsula and/or owned by Saanich Peninsula residents.

5.3 Approval Process:

Acquisitions are ultimately the responsibility of the Executive Director. The responsibility is delegated to the Assistant Director. The decision to acquire an artifact will be made by the Executive Director, or Assistant Director.

The prospective donor or vendor must be issued a Gift Agreement/Deed of Gift form when artifacts are received by Sidney Museum. A Gift Agreement/Deed of Gift 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 thirty days to retrieve the object. If the owner does not retrieve the object within thirty days, it will be disposed of in accordance with Sidney Museum's guidelines and procedures.

5.4 Items of Uncertain Origin:

In cases where new information or circumstance calls into question the grounds on which an item was originally acquired, the Museum undertakes substantive and transparent research in collaboration with all relevant stakeholders and facilitates the prompt return of any item for which its claim may, in light of this research, be considered invalid for legal, moral or ethical reasons.

Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

III. Accessions

Section: (2) Collections

Policy: Accessions

Effective: 13 April 2019

1. PURPOSE:

To outline the accessioning process that allows items to be registered into the Museum Collection.

2. POLICY:

Only when the acquisition criteria have been met to the fullest extent possible and approved by the Executive Director will objects be accessioned by the Sidney Museum. An acquisition is not considered to be accessioned into the collection until it has been numbered, documented, registered and catalogued.

3. RESPONSIBILITIES:

Volunteers designated by the Assistant Director, alongside the Museum Assistant under the guidance of the Assistant Director, are responsible for recording all information pertaining to an object and the accession number of the object into the accession register, card catalogue and collections database within a reasonable timeframe of the object's physical transference into the care of the Sidney Museum.

4. PROCEDURE:

- Accession Number is assigned to the object by the Assistant Director according to the numbering standards set out by Sidney Museum.
- Object is tagged or marked with this number by the designated volunteer or Museum Assistant.
- The object is recorded in the accession register and card catalogue.
- The object is described in full on the Museum database (Collective Access). This includes a photograph using scale bars for the database record.
- The object is prepped for storage to keep it protected and stable according to Conservation Policy.
 - Unless it is put on display, the object shall be put into the permanent collections storage space immediately after cataloguing is completed.

5. NUMBERING SYSTEM:

According to the sequential numbering system of the Sidney Museum, accession numbers consist of three parts. Each part of the accession number is separated by a decimal point. The first part of the number indicates the year the object was accessioned. The second part designates the number of the acquisition/donation of that year, as assigned by the order objects are accepted into the collection according to the accession register. For example, the twentieth acquisition/donation of 2016 would be assigned the number 2016.20. The third part of the number is assigned to each object within an acquisition/donation.

For example, the objects of the twentieth accession of 2016 would be assigned numbers beginning with 2016.20.1, 2016.20.2 etc.

Separate parts of a single object, or separate components that are specifically intended to function together are also assigned alphabetic suffixes.

For example: a pair of shoes = 2016.1.1 a-b; a book with the front cover detached = 2016.2.1 a-b.

If an object is part of a set or portfolio where each object/component of the set may function individually, the whole set is assigned a three-part accession number and each individual component is given a fourth number part.

For example: a set of 8 souvenir spoons = 2016.3.1.1-8; a portfolio of 10 prints = 2016.4.2.1-10.

Undocumented or Found in Collections objects shall be assigned a three-part number similar to that assigned to accessioned objects. However, for FIC objects, the second part of the number shall always be 000. For example: Campaign Pin FIC 2016 = 2016.000.1

6. DOCUMENTATION:

The Assistant Director is required to ensure that all pertinent information and records related to an object being accessioned is documented.

The staff and volunteers of the Sidney Museum must permanently maintain accession documentation as evidence for the legal title.

Accession records must include:

- The name and address of the donor, seller, trading/exchange institution
- Bill of Sale, Gift Agreement/Deed of Gift, or similar instrument of conveyance. All donors are required to sign a Gift Agreement/Deed of Gift to indicate unconditional exchange of ownership and copyright.
- Provenance information, as far as determinable

- Import or export papers for object(s) or collections from foreign countries
- Copyright considerations
- Any gift restrictions or limitations approved by the Executive Director and Board if applicable

Records may also include, but are not limited to:

- If available, the value of the object(s), monetary, scientific, cultural, historic, etc.
- History of the object(s)
- If there are any ethical concerns about the object, then a full history of the object becomes a necessary inclusion in the accession records.

At a minimum, catalogue records in the accession register, card catalogue and collections database pertaining to objects in the collections must include the following information/documentation:

- Object accession number and name
- Description and condition
- Legal status and all accession files pertaining to ownership and title, date received, and donor information
- Classification according to Nomenclature 4.0 For Museum Cataloguing
- Provenance information, as far as determinable
- Actions taken regarding the object, including records of location, conservation, exhibition, publication, and loan.

7. OBJECTS FOUND IN COLLECTIONS (FIC):

In instances where objects without documentation indicating ownership are found in the Sidney Museum's collection, the Sidney Museum shall make every reasonable effort to identify the object and any relevant information about it. A Found in Collections form shall be filled in with all known information, including date found. Staff shall search the museum's digital database first. If nothing is found they shall search the accession logs and physical donation files to locate any relevant information on the object.

If the Sidney Museum is unable to establish ownership, the Museum shall maintain the object until it can be legally determined to be abandoned property. At such a time, the object may be considered for accession into the collection based on the criteria in the Acquisition Policy.

The final disposition of the object in question shall be approved by the Board of Directors. If the object is approved for accessioning, staff members shall follow the procedures laid out in the Accessioning Policy, with the exception of numbering.



Revision History

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IV. Use of Museum Collection

Section: (2) Collections

Policy: Use of Museum Collection

Effective: 13 April 2019

1. PURPOSE:

This policy will outline the appropriate uses of the Museum Collection.

2. POLICY:

Sidney Museum is committed to long-term preservation of artifacts for the benefit of future generations. A balance must be struck however between the preservation of the collection and its use for research, exhibition, educational, promotional and commercial purposes. Sidney Museum acknowledges that access to and use of the collection by staff and public increases the risk to artifacts and requires appropriate controls.

3. PROCEDURE:

3.1 Access to Collection Records and Information:

Access to the collection is provided through exhibitions, programs, events, publications, searchable online database, collection records, research files, visual resources and consultation with curatorial staff.

The Museum makes its collection records available virtually via the Museum's website, which acts as a portal for the Museum's collection database, Collective Access (available by 2020). Members of the public may browse Collective Access or contact the Assistant Director for more information.

While the Museum maintains transparency in regards to its acquisitions, deaccessions and collection information, donor information may be withheld according to the Terms and Conditions at the time of donation and in accordance with the federal Privacy Act.

Access to and handling of firearms is restricted under federal legislation.

3.2 Public Use of the Collection:

Sidney Museum allows limited use of its collection by the public for commercial and non-commercial purposes. This may involve physical or intellectual access to the collection.

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

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 Executive or Assistant Directors 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 risks
- Copyright
- Intended use
- Expertise of the researcher
- Human and financial resources available

Access and the fee structure for use of the collection for commercial purposes are governed by Sidney Museum's Schedule of Fees.

Sidney Museum must be credited for any use of its collection.

3.3 Commercial Purposes:

Access to the collection for commercial purposes is at the discretion of the Executive Director, depending on the request. Requests to use collection material will be considered on a case by case basis. A fee will be charged for uses of a commercial nature.

The Museum may make reproductions of some images from the collection available for purchase. All copyright restrictions will apply regarding reproduction of the images.

3.4 Internal Access and Use:

Designated staff may access the collection for programming, education or research purposes. The Executive Director sets appropriate levels of access for staff, based on the staff position, the sub-collection and reason for requiring access. Staff will be trained in proper handling and security of collection material.

Master copies of unedited intangible collections will be maintained at all times. Designated museum staff may copy and edit content of intangible collections as

needed in accordance with approved policies, procedures and ethical guidelines followed by the Museum.

3.5 Documentation:

The Museum's collection staff will document all occasions on which physical access to the collection is granted. The Museum will maintain all written, photographic and electronic documentation concerning access to the collection, including research requests, written authorization, materials requested, and other relevant forms. Documentation on the kind of research being undertaken on the collection will also be maintained to include the researcher and their organization, the main subject of research, and its expected outcomes, such as scholarly work or other publications.

The Museum will request a copy of any publications resulting from research.

3.6 Photography:

See separate policy for Photograph use.

Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

V. Photography (Still, Film, Video)

Section: (2) Collections

Policy: Photography

Effective: 13 April 2019

1. PURPOSE:

To set the conditions under which photography may be used and facilitated at the Museum.

2. POLICY:

The Museum will allow photographs to be taken of collection material unless otherwise stated. Photography of collection materials in storage will be facilitated and approved based on the terms outlined in this section of the Policy.

The Executive Director approves all photographic activity concerning the collection. All photographs approved for non-private use must credit the Sidney Museum. Photography will not be allowed if it is deemed to cause damage to the collection.

3. PROCEDURE:

For non-private use of photography, a Reproduction Permission form is required.

If permission is granted, the applicant will be entitled to use copies of the approved still images, film, video records or documents one time only. Additional or other use is neither granted nor implied.

Each still image, film, video, record or document must be credited to Sidney Museum.

- The Sidney Museum and Archives Society retains all rights to still images, records and documents in its holdings including any reproductions supplied or derived from the collections.
- Permission to use Sidney Museum and Archives Society still images, records or documents is limited to this one Application and to one project. Authorized use must occur within one year or Permission expires and another Application will be required.
- Any subsequent or additional use will require submission of another Permission Form.
- Duplicating, sharing, transferring, transmitting, renting, selling, sub-licensing, trading, leasing, loaning or giving Sidney Museum and Archives Society still images, records or documents in any format is not permitted.



Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

VI. Deaccession and Transfer

Section: (2) Collections

Policy: Deaccession and Transfer

Effective: 13 April 2019

1. PURPOSE:

The set out the criteria and procedures for the Museum's deaccessioning process.

2. POLICY:

Deaccessioning refers to the permanent removal of one or more artifacts from the permanent collection. In order to maintain a growing and relevant collection in accordance with the Mission Statement and current professional standards, occasionally it is necessary to deaccession an artifact. Deaccessioning must be undertaken in accordance with the highest professional standards and ethics. Reasons must be ethical, defensible and objective. Approval is required from the Museum's Board of Directors.

3. RESPONSIBILITIES:

The Executive Director is ultimately responsible for all recommendations for deaccession, however this responsibility has been delegated to the Assistant Director. This recommendation is reviewed by the Executive Director. The authority to approve any recommendation for Deaccession lies with the Board of Directors.

4. PROCEDURE:

4.1 Criteria for Deaccessioning:

- An artifact constitutes a physical hazard or health risk to staff or public;
- An artifact does not fall within Sidney Museum mission and collection development objectives;
- An artifact would be more appropriately housed at another museum or archives.
- Sidney Museum is incapable of providing the conditions necessary for minimum curatorial care;
- An artifact has deteriorated or is damaged to a point where it does not serve a useful purpose or poses a preservation threat to other elements of the collection;

- An artifact is a duplicate. Provenance and other documentation must be taken into account when determining duplicate status;
- An artifact has unethical or illegal provenance;
- An artifact has been misidentified or is found to be a fake, forgery or copy with no definable purpose;
- An artifact may be removed from the collection as a result of a request for repatriation.

4.2 Conditions for Deaccessioning:

When an artifact is deaccessioned Sidney Museum must ensure that:

- It has clear title to the object or in the case of poorly or undocumented material,
- be able to demonstrate that it has made a serious, diligent and documented investigation to determine ownership;
- There are no legal restrictions that prohibit deaccessioning the artifact;
- The reasons for removal of the object from the collection must be thoroughly documented in accordance with professional standards and documentation;
- If an artifact is undocumented Sidney Museum must make serious and documented effort to learn more about it before considering deaccessioning.

4.3 Process of Deaccessioning:

The process for deaccessioning must be initiated by the Executive or Assistant Director with a written proposal using the Recommendation for Deaccession form supported by appropriate documentation and suggested means of disposition. The proposal must be reviewed by the Executive Director prior to being forwarded to the Board of Directors for approval.

4.4 Methods of Disposition:

A demonstrative effort must be made to keep a deaccessioned artifact in the public domain and in Canada by offering it to other museums or public institutions as a gift or for exchange.

A member of the Sidney Museum and Archives Society, staff or volunteers and their family members may not acquire through any means any artifact deaccessioned by Sidney Museum.

When Sidney Museum chooses to deaccession an artifact staff may consider notifying the original donor as a courtesy.

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

- Internal transfer to the Working Collection or non-collection use

- Gift to another museum or public institution
- Exchange with another museum or public institution
- Sale through a publicly advertised auction sale or by reputable and established dealers. Funds from these sales are used only for the upgrade of the collections and their care.
- Destruction*:
 - if the object is hazardous or poses a danger to staff, public or the collection
 - if the object has deteriorated or is damaged to a point where it does not serve a definable purpose
 - if all reasonable efforts have been made to dispose of the object through other methods

*Two witnesses must be present to observe the destruction.

Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

VII. Loan Policy

Section: (2) Collection Policy

Policy: Loan Policy

Effective: 7 September 2017

1. PURPOSE:

To provide standards for all incoming and outgoing loans for Sidney Museum.

2. POLICY:

The Sidney Museum and Archives requests the loan of an object or collection of cultural and/or historical significance to the Saanich Peninsula for the purpose of serving the exhibition, educational and/or research purposes of the Museum, as identified in the Museum's mission statement. The Sidney Museum may request such loans from a private individual, agency or institution. When Sidney Museum borrows material and exhibits from another institution, it will follow the procedures prescribed by the lending institution. When Sidney Museum borrows material from individuals or from institutions with no lending procedures or forms, it will follow the procedures of Sidney Museum.

3. RESPONSIBILITIES:

All incoming and outgoing loans must be approved by the Executive Director. The Assistant Director shall be responsible for maintaining all pertinent documentation related to a loan.

It is the responsibility of the lending individual or institution to notify the Sidney Museum in writing of a change in address and/or legal ownership of an object or collection on loan to the Museum.

4. PROCEDURE:

4.1 Incoming Loans:

4.1-A Legal Considerations:

The Sidney Museum shall not knowingly loan objects in violation of applicable laws, treaties or accepted professional ethical codes and shall exercise due diligence in reviewing legal title before requesting a loan.

4.1-B Standard of Care:

Objects or collections loaned to the Sidney Museum shall receive the same standard of care extended to objects owned by the Museum. The condition of the object(s) on loan shall be established in writing by means of a Condition Report at the time of receipt. Lenders shall be immediately notified of any damage or injury to an object on loan, identified at the time of receipt or while in the custody of the Sidney Museum. Objects on loan shall not undergo any conservation treatments or be altered or repaired while in the custody of the Sidney Museum, unless otherwise specified in the terms of the loan.

4.1-C Accepting Incoming Loans:

Upon receipt of an incoming loan the Sidney Museum will endeavour to ensure the loaned objects remain in the condition they came in, and remain organized.

The Assistant Director, or designated staff member is responsible for:

- Unpacking the objects.
- Taking accurate inventory.
- Writing an initial condition report, including photographs if possible
- Assigning a temporary loan number to each object, and attaching the number to the object with a temporary tag.
- Securing the objects in a temporary storage space, and documenting it.

4.1-D Returning Incoming Loans:

Upon a loan's physical return to the Sidney Museum the Assistant Director is responsible for:

- writing a final condition report.
- reporting any damages or condition concerns (if applicable) to the loaning party.
- repacking the objects.
- ensuring their safe transport back to the loaning party according to the loan agreement.

4.1-E Acknowledgements:

The Sidney Museum appropriately acknowledges the lending individual or institution on all exhibition labels and public material. Objects on loan shall not be reproduced for sales purposes, unless otherwise specified in the terms of the loan.

4.1-F Loan Form:

Incoming loans must be fully documented. The documentation will include one copy of the signed loan form and information relating to value and condition. This record becomes a permanent record.

The Sidney Museum's Incoming Loan Form must include:

- The terms of the Loan
- The purpose of the Loan
- The duration of the Loan
- Lender contact information
- A description of the item(s) on Loan
- The specified credit requirements and language for acknowledging the lending individual or institution in exhibit labels, catalogues, press materials, other linked information
- Copyright and reproduction rights specifications
- Assessment of the object's physical condition written in a Condition Report prepared by Museum Management at the time of receipt, including photo documentation if possible
- Transit, handling and special installation instructions
- Insurance and appraisal specifications

4.1-G Renewal:

Loans shall be evaluated by the Assistant Director and approved by the Executive Director for a duration not exceeding a five-year, renewable loan.

At the conclusion of a loan period, unless renewed, loaned objects shall be returned to lender 30 days after loan period has expired. In instances where the lender desires to end a loan prior to the specified expiration date, a request must be made in writing to the Executive Director for review.

4.1-H Unclaimed Loans:

A written notification of the loan period's expiration shall be sent to the lending individual or institution 14 days prior to the loan end date. If the lender fails to reclaim the loaned property, the Sidney Museum will observe the following procedure:

- Non-renewed loans unclaimed after 30 days of the loan period expiration shall be sent a second written notification.
- Non-renewed loans unclaimed after 90 days of the second written notification may be assessed a non-refundable \$100.00 fee per item (or higher if previously specified) for annual storage and maintenance considerations.
- Final disposition of the object(s) shall be in accordance with the appropriate legal standards.

4.2 Outgoing Loans:

The Sidney Museum temporarily lends objects from the Museum's collection to non-profit cultural, historical or educational institutions, museums and archives for temporary exhibitions and other educational and scholarly purposes. Objects in the Sidney Museum's collection shall not be loaned to private individuals or agencies for personal or decorative uses.

Loans shall be made for a specified period up to 12 months and shall be reviewed annually by Museum Management. Loans of a period longer than 12 months may be authorized at the discretion of the Executive Director.

4.2-A Loan Considerations:

- The condition of the object as well as its preservation and conservation needs. Loan requests deemed unsuitable for objects based on poor or unstable physical condition, or for objects in need of conservation treatment, shall not be accepted.
- The individual value of the item and its value to the Sidney Museum's exhibitions, educational programs, and teaching needs. Loan requests for objects of exceptional value, rarity, or primary importance to the Museum's exhibitions or programs may be rejected.
- The current facilities, environmental conditions, and security provisions of the requesting institution.
- The significance and importance of the exhibition or project for which the loan is requested and the potential outcomes of the loan including scholarship and publications.
- Objects on loan must remain in the condition that they were received as established by Museum Management in the Condition Report. Objects on loan shall not be cleaned, treated, repaired, marked, remounted, or altered in any way except with explicit written permission from the Executive Director. Tags and/or other means of identification shall not be removed.
- The Sidney Museum must be notified immediately if a loaned object is damaged, lost, or stolen.

- Objects may not be moved to another location or loaned to a third party without the approval of the Executive Director.

4.2-B Outgoing Loan Form:

The Sidney Museum's Outgoing Loan Form must include:

- The terms of the Loan
- The purpose of the Loan
- The duration of the Loan
- Complete borrower information, including contact information
- Assessment of the object's physical condition written in a Condition Report prepared by Museum Management of the outgoing object, including photo documentation if possible
- A Condition Report prepared by the receiving institution's curator, registrar or conservator at the time of receipt, including photo documentation if possible
- Any limiting conditions, such as special installations or security requirements
- The specified credit requirements and language for acknowledging the Sidney Museum's ownership of the loaned item and/or the original donor in exhibit labels, catalogues, press materials, other linked information
- Copyright and reproduction rights specifications
- Insurance specifications
- Transit and handling instructions

4.2-C Preparing Outgoing Loan:

The Assistant Director at the Sidney Museum is responsible for:

- writing a condition report for all approved items, including photographs if possible
- securely packing the objects for transport
- engaging in communication with the borrowing party to ensure that safe transport of objects is provided
- engaging in communication with the borrowing party to ensure that any security concerns regarding the loaned objects are addressed.

4.2-D During Outgoing Loan:

If the loan is approved by the Executive Director to last for a period longer than twelve (12) months, the Assistant Director at the Sidney Museum is responsible for maintaining communication with the borrowing party in order to receive annual updates on:

- Object condition
- Display conditions

- Insurance and indemnity policies

4.2-E Return of Outgoing Loan:

Upon a loan's physical return to the Sidney Museum the Assistant Director is responsible for

- unpacking the objects
- writing a final condition report and evaluating objects for any discrepancies
- reporting any damages (if applicable)
- ensuring that the loaned objects' location is updated in the database
- returning the objects to the collections space

4.2-F Renewal:

A written request addressed to the Executive Director is required if a borrowing institution wishes to extend the loan of an object or collection owned by the Sidney Museum.

Renewal requests shall be reviewed by the Assistant Director and may be authorized for an additional period of up to 12 months. Renewed loans of a period longer than 12 months may be authorized at the discretion of the Executive Director.

If a loan is not renewed the object(s) on loan must be returned to the Sidney Museum within 30 days of the loan period's expiration unless otherwise specified in the terms of the Loan.

Revision History

Revision	Date	Description of Changes	Requested By
0	9 September 2017	Initial Release	Board
1	27 January 2019	Reformatted -Change Collections Committee to Museum Management	Alyssa Gerwing

VIII. Conservation

Section: (2) Collections

Policy: Conservation

Effective: 13 April 2019

1. PURPOSE:

To outline the requirements for conservation in the care for the Sidney Museum's collection.

2. POLICY:

Sidney Museum has a responsibility to preserve its collection in perpetuity, including artifacts in storage, on exhibit, used for research, on loan and in transit.

3. RESPONSIBILITY:

The preservation of the collection is the direct responsibility of the Executive Director, Assistant Director and other staff as appropriate. All staff and volunteers however, must share the responsibility.

4. PROCEDURE:

All staff and volunteers will be trained in proper and current methods of care and handling of the collection, as it pertains to their area of work.

Staff and volunteers will strive to maintain artifacts and collection records in an environment conducive to preservation. The Assistant Director will 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 Assistant Director.

In all of care and handling activities, staff of Sidney Museum will comply with Sidney Museum Conservation Policy.

Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

IX. Management & Repatriation of Culturally Sensitive Materials

Section: (2) Collections

Policy: Management and Repatriation of Culturally Sensitive Materials

Effective: 13 April 2019

1. INTRODUCTION:

The Sidney Museum and Archives is committed to working respectfully with the Indigenous communities from whom the Museum's Indigenous collection have originated. Discussions regarding repatriation are governed by this principle. In the repatriation process, complex issues may arise, and the Museum strives to meet those situations with due care and respect on a case-by-case basis. The Museum is committed to working collaboratively with First Nations to co-manage the care and custody of cultural objects housed in the Museum, and engaging in knowledge sharing with those partners.

With repatriation requests, the Museum will involve the Indigenous community in the process of responding to the claim, with notification of the claim, knowledge sharing and the final result of the request. The objects and options, such as loans, or replications are the tangible elements in a repatriation process. Equally important, however, are the intangible elements: the respect with which the process is conducted and the meaning of repatriation in the changing relationship between museums and Indigenous peoples.

2. PURPOSE:

The purpose of this policy is to:

- A. Provide information on how to make a claim for repatriation of First Nations cultural materials in the Sidney Museum and Archives' collection.
- B. Explain how the Museum processes a claim.
- C. Outline alternatives to repatriation such as special access to collections, loans and stewardship arrangements, within the limits of the Museum's own resources and available funding.

3. RESPONSIBILITIES:

The Executive Director is responsible for receiving all repatriation requests.

4. POLICY:

The Museum has a responsibility to continue to pursue, in a respectful manner, a close and collaborative relationship with the originating communities of the collections in its care, and related material connected to them. Repatriation is part

of this process. During repatriation, complex issues often surface. In many cases, for example, there may be no clear evidence, either oral or written, of the pathway that led the object to become housed in the Museum. The Museum acknowledges that all Indigenous material is part of the intellectual and cultural heritage of the respective Indigenous peoples. It is for reasons such as these that the Museum considers all requests for repatriation on a case-by-case basis. Repatriation means recognizing people's stake in their heritage, which in practice can mean such things as negotiated return of objects and related cultural materials, and/or sharing authority and responsibility for care and interpretation of collections in the Museum. We will consider a variety of options to meet the spirit and intent of a request.

5. PROCEDURE:

- A. Requests for repatriation of cultural materials should be made in writing, and addressed to the Executive Director of the Sidney Museum and Archives. They should clearly identify the First Nation and/or group(s) making the claim, state the reasons for the request, and the objects covered by the request.
 - a. Eligibility: For repatriation to occur, a relationship must exist between a claimant and the requested material. This relationship can be lineal descent or cultural affiliation. Cultural affiliation can be based on biological, historical, geographical, genealogical, archeological, linguistic, ethnological, archival, or expert opinion.
- B. Requests for repatriation will be acknowledged by the Executive Director and then referred to a standing committee appointed by the Executive Director for review as outlined below (See Standing Committee Procedures).
- C. The Museum will consider all requests for repatriation of cultural materials regardless of facility status, however, individuals must be represented by their community, Nation or related association. In the event of conflicting claims, the Museum will inform parties that a conflict exists and defer decisions about repatriation until the conflict has been resolved by mutual agreement of the claimants. The Museum will consult with claimants, but not interfere with the process. Once the conflicting claimants have proposed a unified position to the Museum, the Museum will continue processing the request.
- D. Following a recommendation from the standing committee, the Executive Director will inform the claimants of the finding, and begin processing the recommendations. In accordance with Sidney Museum and Archives procedure, any decision by the Museum to remove the object(s) permanently from the collection must be confirmed by the Society's Board of Directors, to which the Museum reports. Anyone wishing to appeal a decision by the Museum may use the same route to submit an appeal. Appeals should be addressed to the Chair of the Sidney Museum and Archives Society.
- E. Where repatriation is not achievable or the outcome agreed to by conflicting claimants, the Museum will consider a variety of options to meet the spirit and intent of a request, including (but not limited to) special access to holdings, loans,

- exhibits, stewardship arrangements, sharing authority and responsibility for care and interpretation, replication or new creation of objects, and respectful storage and/or display of collections in accordance with the advice of the originating peoples.
- F. Following a recommendation for repatriation to the requesting community, negotiations may begin for the timing and circumstances of repatriation.
 - a. Throughout the repatriation process, the Museum will continue to care for the collections, and may conduct inventory for the purpose of curatorial documentation.
 - G. The initiator of the request may also request a delay in implementation of repatriation, and in such a case the Museum will continue to curate the material on the requestor's behalf until the resumption of repatriation at a later date.

6. STANDING COMMITTEE PROCEDURES:

- A. This committee will review Museum records and all information received from the requestor(s) concerning the object(s) requested.
 - a. Standing Committees will be made up of at least two Museum staff members, two Museum Board members, and efforts will be made to include at least one First Nations representative not involved in the claim.
 - b. Each request for repatriation will be reviewed according to the following criteria:
 - i. The historical relationship of the requestor(s) to the objects concerned.
 - ii. The conditions under which the materials requested were acquired by the Museum.
 - iii. The possibility of competing claims to the cultural objects.
- B. The interests of the community making the request will be foremost in the committee's consideration of the application. The Museum will make every effort to involve the community and/or individuals in the process of responding to the claim.
- C. In the case of requests from First Nations individuals or organizations other than First Nations governing bodies, the committee will notify relevant First Nations governing authorities of the request and seek their advice.
 - a. The committee may advertise or take other necessary steps to identify other possible claimants.
- D. The committee will evaluate the information and make recommendations to the Executive Director for action.

7. HUMAN REMAINS:

There are no ancestral skeletal remains in the Museum's collection. With respect to funerary or other objects (if any), which could have been associated with human remains, the Museum is guided by this policy.

8. GUIDELINES:

- A. The Museum will respond as quickly as possible to all requests for repatriation of cultural materials in its collections.
- B. The Museum will use its best efforts and consider all options available to meet the spirit and intent of a request. These may include (but are not limited to) special access to holdings, loans, exhibits, stewardship arrangements, replication of objects, and respectful storage and/or display of collections in accordance with the advice of the originating peoples (peoples from whom the collection came).
 - a. Cooperative Management: The Museum endorses the practice of cooperative management and may enter into Custodial Agreements and/or Memoranda of Understanding with Indigenous groups on the Saanich Peninsula and/or Gulf Islands, including cultural centres, governments and other recognized Indigenous organizations regarding cooperative care, preservation, interpretation and exhibition of Indigenous tangible and intangible heritage in the Indigenous collection housed on the Museum's premises. The Museum will consult and collaborate with those Indigenous partners regarding the care and handling, as well as display if applicable, of their cultural materials while housed on the Museum's premises.
- C. While the Museum recognizes that First Nations are governed by their own traditions and policies, the Museum's negotiating position is guided by Canadian law and international agreements signed by Canada.
- D. Museum staff will endeavour to answer requests for information about objects in the collection as quickly as possible.
- E. The primary mission of the Sidney Museum and Archives is: The Sidney Museum & Archives Society is an organization that acquires, preserves and makes available the heritage, culture and interests of the Saanich Peninsula community.
- F. The Museum will endeavour to consult with originating communities on the storage, care of, and access to culturally sensitive materials, and welcomes community initiatives in these areas.
- G. In cases where loans rather than repatriation are requested, or in cases where a repatriation agreement is not reached, the Museum will make every effort to provide originating peoples with access to collections, guided by the Museum's Collections policy.
- H. The Museum seeks to work collaboratively with Indigenous peoples to cooperatively manage the care, custody, documentation and interpretation of tangible and intangible cultural heritage.
- I. The Museum will maintain a list that will be available, either publicly online or by request, of all Indigenous cultural materials held in the Museum's Indigenous, Archaeological and Archives collections.
- J. A repatriation case file will be maintained and updated for each individual claim. All information pertaining to the particular request will be included in the case file.
- K. The Museum will maintain a written record, photographs, and copies of all documents pertaining to the repatriated object(s) for their own records. A copy of

these records will also be provided to the Nation or group receiving the repatriated object.

- L. The Museum reserves the right to document or reproduce any repatriated object in its collection before it is removed from the collection, while taking the cultural concerns or wishes of the claimant into account.
- M. In cases where objects have geographic ties that fall outside the Museum's geographically-defined collection area, items will be repatriated to the community or organization that represents that area.
- N. The Museum will hold repatriation discussions in confidence until a joint resolution and public announcement are agreed upon.

*This is a working document, and subject to revision. Please see the revision history below.

Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing
1	15 July 2021	Complete Rewrite and Expansion	Alyssa Gerwing

X. Tax Deductions and Monetary Appraisals

Section: (2) Collections

Policy: Tax Deductions and Monetary Appraisals

Effective: 13 April 2019

9. PURPOSE:

To provide guidelines for tax deductions and monetary appraisals for the purpose of collections.

10. POLICY:

The Museum may only issue tax receipts according to the following procedure and may not issue monetary appraisals.

11. PROCEDURE:

The Museum issues tax receipts for donated objects at fair market value, following the legal transfer of ownership of acquired material. Objects will be appraised after the Gift Agreement has been signed by both parties. The Executive Director may provide an appraisal for gifts with a fair market value of up to \$1,000.00 in accordance with the laws of the Province of British Columbia and Canada. For gifts with a fair market value of over \$1,000.00 appraisals will be conducted by an independent arm's length appraiser. For any gifts with a fair market value of \$5,000.00 and above, appraisals will be conducted by 3 independent arm's length appraisers.

The Museum will not bear the cost of appraising donations to the collection except under extraordinary circumstances. While the Museum will facilitate the appraisal process for donations valued above \$1000.00, any costs related to the appraisal process will be the responsibility of the donor.

The Museum will comply with all provisions of the *Cultural Property Act* regarding documentation, procedures, appraisals, and issuance of tax receipts when acquiring materials certified under the Act.

The Executive Director or Assistant Director will only conduct appraisals of collection materials for the purpose of issuing tax receipts at the time of donation or for obtaining insurance in accordance to the value benchmarks as listed above. Museum staff cannot provide monetary evaluations for private individuals or organizations.

Revision History



Collections Policies & Procedures Employee Handbook 2019

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

XI. Insurance

Section: (2) Collections
Policy: Insurance
Effective: 13 April 2019

1. PURPOSE:

To outline the policy regarding insurance requirements of the Museum.

2. POLICY:

Through the Sidney Museum and Archives Society, the Museum provides insurance for its collection and for loans to and from Sidney Museum. The Executive Director is responsible for the insurance of the collection at fair market value and acquiring additional coverage when necessary. The Assistant Director is responsible for providing valuations for insurance purposes

Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

XII. Documentation

Section: (2) Collections
Policy: Documentation
Effective: 13 April 2019

1. PURPOSE:

To outline the documentation requirements for Sidney Museum's collection.

2. POLICY:

Sidney Museum must accurately and thoroughly document the collection to realize its value and significance. Documentation is essential for collection development, research, preservation and interpretation.

3. RESPONSIBILITY:

Documentation is the responsibility of the Executive Director and other staff as appropriate.

4. PROCEDURE:

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

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

Temporary or permanent change in the status of an artifact such as an outgoing loan, on exhibit or deaccessioned must be thoroughly documented.

Sidney Museum will use accepted and consistent standards, methods and procedures to document the collection. Documentation must be maintained as a permanent record.

Normally documentation itself is not considered part of the collection. 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.

Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

XIII. Security

Section: (2) Collections

Policy: Security

Effective: 13 April 2019

5. PURPOSE:

To outline the security standards for Sidney Museum's collection.

6. POLICY:

Sidney Museum must ensure the security of its collection at all times, including during storage, display, use or transport.

7. RESPONSIBILITY:

Security is the responsibility of the Executive Director and other staff as appropriate.

8. PROCEDURE:

All staff is responsible for maintaining the security of the collection. This includes loss or breaches in security. Staff and volunteers must document and report immediately any confirmed loss to the Assistant Director who will report to the Executive Director.

In some cases, (e.g. firearms) legal considerations may require that the police are also notified.

Revision History

Revision	Date	Description of Changes	Requested By
0	21 January 2019	Initial Release	Alyssa Gerwing

XIV. Archaeology/Paleontology

Section: (2) Collections

Policy: Archaeology/Paleontology

Effective: 12 October 2019

9. PURPOSE:

To set the conditions under which archaeological or paleontological materials may be collected by the Museum. Provincial and territorial governments have all created one or more laws that deal directly or indirectly with archaeology or archaeological resources under their jurisdiction. These laws require both governments and the private sector equally to plan for archaeology and to protect archaeological resources, whether they are discovered by accident or as part of a purposeful research effort. Each provincial and territorial government has established a process for obtaining permits for archaeological research and for the filing of reports on authorized excavations.

POLICY:

The Museum will only collect those materials that have been processed by professional archaeology/paleontology companies or government departments. The Museum shall not, under any circumstances, include human remains in their collection.

It is an offence to disturb the site of an archaeological find. On federal lands, the rules at the Parks Canada Agency and at the Department of National Defence require that finds be reported and protected immediately.

PROCEDURE:

Once contacted by an authorized company or department, the Museum will accept materials provided they include:

- dig site paperwork
- photographs
- Borden Numbers (in the case of archaeological materials).

Revision History

Revision	Date	Description of Changes	Requested By
0	22 September 2019	Initial Release	Alyssa Gerwing