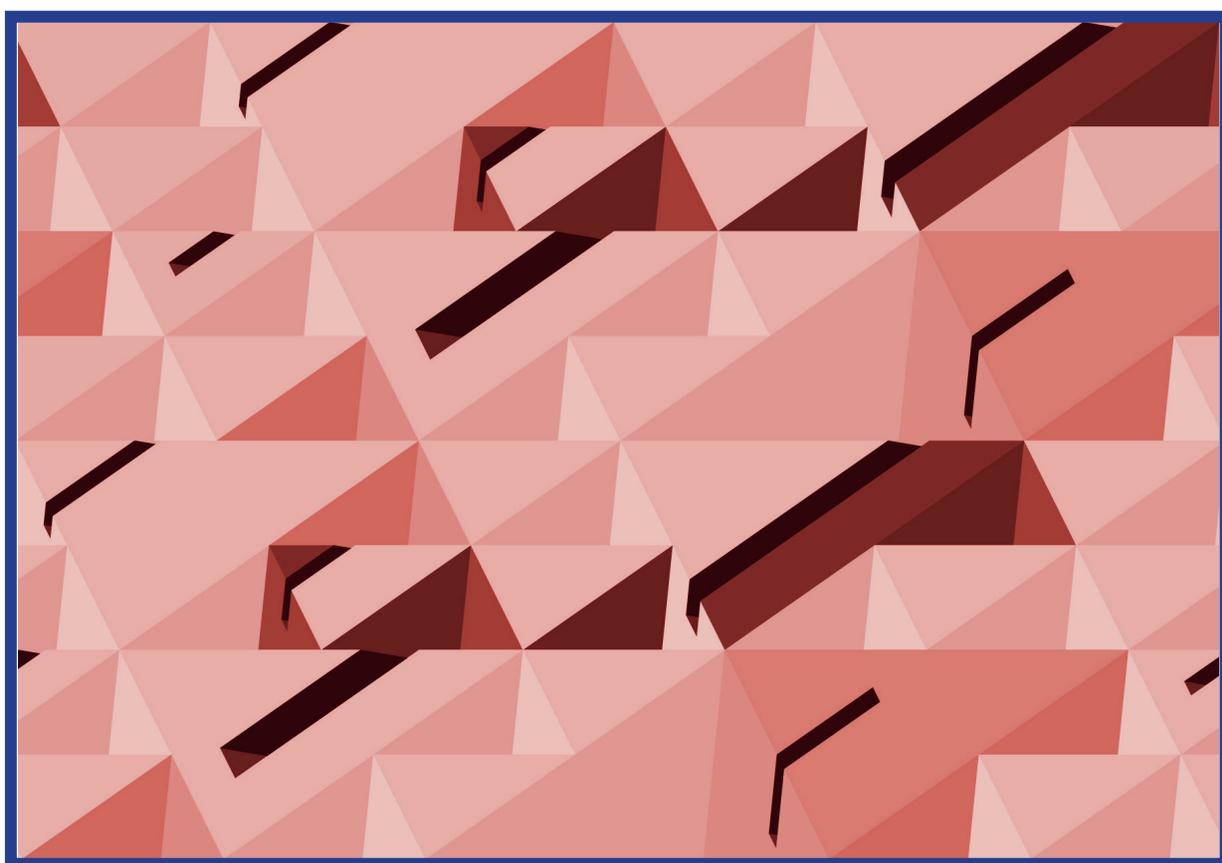


COLLECTIONS STEWARDSHIP SELF-ASSESSMENT WORKBOOK 2017



MUSEUMS
ASSOCIATION OF
SASKATCHEWAN

MUSEUMS ARE MORE...

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Acknowledgements

The *Collections Stewardship Self-Assessment Workbook* was developed to provide a series of simple questions to help our members to determine where their institutional ranking is in various areas of collections stewardship (Collections Policy, Collections Documentation, Collections Storage and Conservation). Members can then use their scores to help to identify areas of weakness and to strengthen their collections management and preservation practices. The self-assessment workbook also provides our members with the opportunity to record and track their individualized changes and improvements made over time.

The workbook's secondary purpose is to aid MAS in screening organizations for readiness to participate in our ongoing SaskCollections Database Project.

Collections Stewardship Self-Assessment Workbook for Saskatchewan Museums was written by Laura Phillips. Kathleen Watkin, MAS Advisor facilitated the project on behalf of MAS with the guidance of Wendy Fitch, Executive Director and Dan Holbrow Planning Director. The members of the MAS community were consulted and provided valuable feedback.

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The logo for Canada, featuring the word "Canada" in a serif font with a small Canadian flag icon above the letter "a".The logo for SaskCulture, featuring the word "Sask" in a bold sans-serif font and "Culture" in a script font, with a large stylized "C" behind the word "Culture".

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Assistance and further information about the *Collections Stewardship Self-Assessment Workbook* can be obtained from:

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Collections Stewardship

Self-Assessment

These performance indicators help you to evaluate where you are doing well and where you need improvement with your collections and its management. Each performance indicator has criteria listed for each sub division to help your self-assessment, with suggestions listed that can help your institution improve to achieve the highest standards.

It is important not to feel overwhelmed, and to break down each area for improvement into tasks and a manageable long-term work plan that is realistic for the resources that are available.

Instructions on How to Use the Manual

This manual is divided into 4 sections:

- A. Collections Management (CM)
- B. Collections Conservation (CC)
- C. Collections Storage (CS)
- D. Collections Research (CR)

With all Staff (Paid and Unpaid), review and reflect upon each *Standards Based Question(s)*, its associated *Saskatchewan Standards* and reasoning for importance:

1. Look at the *Performance Indicators* column and select the option(s) that best describe the present situation at your institution. If you end up with a tie, chose the Performance Indicator Level that best represents your institution's situation.
2. Use the *How to Improve/Maintain* section to allocate tasks for Staff (Paid and Unpaid) to undertake so the institution can perform better in this area.
3. If your current situation is 'Bronze', use the steps listed in 'Graduate to Silver' first, and then undertake the 'Graduate to Gold' tasks. The long-term goal should be to achieve the Gold status for each Standard.
4. Use the workbook columns to record the date each improvement task is completed, as well as any relevant notes relating to the task.

Additionally, with the Staff (Paid and Unpaid),

- Review each Section's *Tips and Hints*. Discuss any that might be useful to put into practice in your institution.
- Review *Unacceptable Practices* with all Staff (Paid and Unpaid) to ensure these are clearly understood.
- For additional information see *Further Resources for Improvement* and/or contact MAS.

Yearly: Review and reflection upon each section. Make notes of your progresses and areas for improvements. You can then apply this information to your strategic and long term planning goals.

Please Note: Underlined words are defined in the Glossary.

Unacceptable Practices:

While this document contains many appropriate policies and practices within the standards and performance indicators, there are many unacceptable practices that may occur within a museum that require special attention. The following list addresses practices that are unethical and in some cases, illegal.

Collections in cultural institutions are held in the **public trust**. Caring for these collections is therefore critical work, making collections misuse a serious violation. This includes (but is not limited to):

- Failure to establish clear ownership of a potential artefact or archives donation prior to acceptance into the collection
- Accepting collections without a clear understanding of how they will help you to fulfill your mission statement and/or collections that fall outside the areas listed in your Acquisitions Policy.
- Personal use of artefacts and archival items by any individual for any reason
- Performing irreversible cleaning, restoration or other procedures on a collection item, such as applying an accession number in a permanently damaging manner, or mechanical or chemical cleaning, unless performed by a professional trained conservator.
- Use of funds from deaccessions for anything other than **acquisition** of new collections or **direct care** and **conservation** of existing collections.
- Individual use of or dealing in collections by Staff (Paid and Unpaid) by gift, purchase or loan for personal gain.
- Misrepresentation of an artefact's origin, history or condition.
- Use of collections (beyond reasonable handling as part of a collections processing and exhibition) in a manner that threatens their preservation unless designated as part of the **hands-on** or **teaching collection**.
- Inattention to national and international regulations regards First Nation remains, funerary objects, sacred objects and objects of cultural patrimony.
- Allowing any events or activities that could cause possible harm to the collections.
- Having no Staff (Paid and Unpaid) assigned to collections care including preventative care; collections access; collections management and/or collections research.
- Not following pest management procedures and conduction regular pest management checks.
- Making no attempt to research and record tangible and intangible details about the collections.
- Not regularly monitoring the museum's environment and attempting to control large fluctuation in relative humidity, temperature and light.
- No consideration of collections safety and security. This includes allowing unaccompanied visitors to enter collections storage areas, allowing untrained Staff (Paid and Unpaid) to handle and/transport the collection, and not creating and adhering to Risk Management Strategies

Standards for Collections Management

Museums fulfill their public trust obligations in collections management by preserving their collections ‘in perpetuity.’ The museum’s responsibility to manage the collection on behalf of the public includes not only the preservation of the artefact itself but as importantly, the history and records relating to the artefact.

The management of a collection includes the implementation of policies and procedures for the legal and ethical acquisition, documentation, and disposition of material by the museum. Collections-based research is essential because artefacts and their stories provide the basis for exhibits and programs.

Collections Management’ Tips and Hints:

- Backing Up copies of collections records and storing them offsite
- Assess if your catalogue system is collecting enough documentation and provenance information. Attempt to fill in gaps in the collections documentation
- Create and maintain a Collections Preservation Toolkit (ex: cotton gloves, nitrile gloves, soft brushes)
- Create and maintain a Collections Accession Toolkit (ex: soft pencils, India ink, B-72, Acetone, Erasers, Mylar, archival safe acid free tags and paper, unbleached cotton muslin)
- Be honest with donors. Do not accept anything into your collections that does not meet with your Museum’s mandate. If acquiring an artefact, ensure that the donor signs the transfer of ownership and that they understand that the museum now owns the artefact(s) and can do with it what they feel is best.
- Front of house Staff (Paid and Unpaid) are often the first people the visitors will approach with collections questions. These questions may be based on media reports or current news stories about museums or collections. Keep your Staff (Paid and Unpaid) informed and educated so they can provide informed, relevant answers when asked.
- Oral history audio files should be treated the same way as objects within your Acquisitions Procedure to ensure the content is suitable for your institutions collecting guidelines and mandate
- The Elders in First Nations / Métis communities are an invaluable resource for information about material culture, for institutions and their own communities. Objects and archives can be used as talking points for them to recall stories their Elders told them, providing an opportunity for relearning old ways that help reclaim knowledge and traditions.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM1: Does the institution have a detailed mission/mandate statement? Are the collections appropriate to the institution's mission and mandate?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management- A1</i></p>	<p>These questions are important because this statement is the foundation for all of the activities carried out by the institution.</p>	<p>Gold:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has a detailed mission / mandate. This statement is included on the institution's website and/or available for public consultation by request at the museum. <input type="checkbox"/> To ensure collections are appropriate to the institutions mission and mandate, the institution has clear collecting areas listed in the Acquisitions Policy. These are used to guide decisions for accepting new acquisitions. <p>Silver:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has a mission / mandate but collecting areas have not been listed in the Acquisitions Policy. <p>Bronze:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution does not have a mission / mandate.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Undertake an annual review of the mission / mandate, including the Acquisitions Policy.</p> <p>Consider any recent strategic planning or programming goals in relation to the collecting areas.</p> <p>Ensure Deaccession / Disposal policies and procedures have adequate evaluation steps that enable collections that do not fit the policy to be considered for removal from the collections.</p>		
<p><u>Graduate to Gold</u></p> <p>Draft collecting areas based on the mission / mandate for addition to the Acquisitions Policy. Be sure to include the type of collections that reflect the mission / mandate, as well as any time period, themes, subjects and maker priorities.</p> <p>Consider your current collections. Have they been categorized into general themes or subjects? Be sure these themes are included in your collecting areas.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a mission / mandate for approval by the governing body.</p> <p>Consider the reasons your institution was founded, and the unique contributions your institution is making to the public interest and understanding of the subject area(s) your collections encompass.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM2: Does the institution have a strong written Collections Management Policy and related Procedural Manual that are reviewed by a governing body (Board of Directors/ Trustees or Community Council) on a regular basis?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A1, A2, A8, A24, A39, A52</i></p>	<p>This question is important because this policy and the related procedures will guide all of the activities undertaken by the collections Staff (Paid and Unpaid) in their daily work with the collections held in trust by the institution.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has a comprehensive Collections Management Policy. <input type="checkbox"/> The institution has a Collections Management Manual that includes clear procedures for each of the sections in the Collections Management Policy, which includes the following sections: Acquisitions/ Accessioning, Deaccessioning/ Disposal, Loans, Care of Collections (Storage, Integrated Pest Management, Conservation, Insurance and Risk Management, Record Management and Documentation) Legal and Ethical Considerations, Repatriation. <input type="checkbox"/> Policies are reviewed and revived on a regular basis (2-5 years). <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has policies and procedures that relate to collections management but they are not comprehensive. <input type="checkbox"/> The institution has policies and procedures that relate to collections management but they are not reviewed regularly. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution does not have a Collections Management Policy. <input type="checkbox"/> The institution does not have a Collections Management Manual.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure both the policy and the manual are reviewed regularly (2-5 years) by the collections Staff (Paid and Unpaid), and any policy revisions are presented for approval by the governing body.</p>		
<p><u>Graduate to Gold:</u></p> <p>Pull together all of the policies and procedures that relate to collections management. Review what is missing from the existing policy and allocate collections time to drafting the missing sections in a reasonable time frame.</p> <p>Prepare procedures based on the policies for the Collections Management Manual.</p> <p>Ensure the policies and procedures are reviewed annually and any revisions are prepared for presentation to the governing body.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a basic Collections Management Policy based on existing working practice at the institution, using the sections listed in Resources for Improvement.</p> <p>Draft basic Collections Management procedures based on existing working practice at the institution using the sections from the Collections Management Policy. Include any forms used and list basic bullet point steps on each document as a starting point that can be expanded into a comprehensive procedure at a later date.</p> <p>Ensure the policies and procedures are reviewed regularly (2-5 years).</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM3: Are Collections Staff (Paid and Unpaid) aware of the laws and regulations (both government and museum standards) and the Collection Management Policy with regards to collections? Are volunteers made aware of collections laws and regulations that are relevant to their projects?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A1, A3</i></p>	<p>These questions are important because any Staff (Paid and Unpaid) working directly with the collections must fully understand the legal requirements and institutional expectations related to their daily work and / or projects.</p> <p>The collections are held in trust by the institution, so the agreed laws and regulations are in place to ensure the longevity and safety of the collections.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> All Collections Staff (Paid and Unpaid) are aware of the laws and regulations relating to collections and the Collections Management Policy. <input type="checkbox"/> All Staff (Paid and Unpaid) feel comfortable answering basic questions about collections laws, regulations and the Collections Management Policy from members of the public. <input type="checkbox"/> Staff (Paid and Unpaid) know who to ask for further information about collections laws, regulations and the Collections Management Policy. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Only regular Collections Staff (Paid and Unpaid) are aware of laws and regulations related to collections, and the Collections Management policy. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Regular Collections Staff (Paid and Unpaid) have minimal knowledge of laws and regulations related to collections.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Have a 'Frequently Asked Questions'/ general summary document of laws and regulations (both government and museum standards) relating to collections that is included in the Staff (Paid and Unpaid) manual and volunteer handbook. This document should be reviewed during Staff (Paid and Unpaid) orientation / induction programs.</p> <p>Hold annual refresher workshops for Staff (Paid and Unpaid) to review basic Collections Management information.</p> <p>Every 1-3 years, review the document and ensure it is updated with any changes.</p>		
<p><u>Graduate to Gold:</u></p> <p>Review the drafted document at an all Staff (Paid and Unpaid) meeting, and present existing Staff (Paid and Unpaid) with a copy to keep for reference. Provide an opportunity for Staff (Paid and Unpaid) to ask questions after reviewing the document.</p>		
<p><u>Graduate to Silver:</u></p> <p>Allocate collections Staff (Paid and Unpaid) time to researching laws and regulations related to collections.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM4: Does the institution recognize and adhere to the role of professional ethics regarding the collection?</p> <p><i>Associated Saskatchewan Museums Standard: Collections Management - A3, A18, A19, A20, A21, A89</i></p>	<p>This question is important because:</p> <ul style="list-style-type: none"> • There is an international expectation for behaving in an ethical way in regards to collections. • All institutions holding collections in public trust should meet international standards. • Failure to comply with professional ethics will tarnish the reputation of the institution, cause the loss of public trust, and possibly negatively affect external funding decisions. 	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has an Ethics Policy in place based on the ICOM Code of Ethics, with a sub section relating to professional ethics and collections. <input type="checkbox"/> The Ethics Policy includes steps for sanctions and governance when ethical issues arise. <input type="checkbox"/> Staff (Paid and Unpaid) have access to resources to learn about professional ethics relating to collections. <input type="checkbox"/> Related policies are cross-referenced with the Ethics policy. For example: The Collections Management Policy. <input type="checkbox"/> Ethics policy is reviewed every 2-3 years. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has an Ethics policy but it is not reviewed regularly. <input type="checkbox"/> The institution has an Ethics policy but it does not have a specific section relating to professional ethics and collections. <input type="checkbox"/> The institution has an Ethics policy but it is not enforced and/ or it's not widely known by Staff (Paid and Unpaid). <input type="checkbox"/> The institution has an Ethics policy but its relationship to other policies is unclear. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution does not have an Ethics policy.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure the Ethics Policy is reviewed annually and any revisions are presented for approval by the governing body.</p> <p>The Ethics Policy must have provisions specific to the needs of the institution so that it is relevant and practical to implement.</p>		
<p><u>Graduate to Gold:</u></p> <p>Assign the review of the Ethics policy to a senior Staff (Paid and Unpaid) member and add to the agenda of an annual meeting of the governing body.</p> <p>Add a section relating to professional ethics and collections to the Ethics policy. Collections Staff (Paid and Unpaid) should be invited to comment on this section. This section should cover the headings found in the guidelines in Further Resources.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft an Ethics policy for approval by the governing body.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM5: Are designated, trained Staff (Paid and Unpaid) responsible for the collection?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A6, A11, A16, A23</i></p>	<p>This question is important because it shows the institution acknowledges that specialist skills and attention are required to properly care for their collections held in trust.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Essential collections roles allocated that follow professional standards for collections care: <u>Registrar, Curator, Collections Manager</u> (Might be multiple persons or a single person). <input type="checkbox"/> If no professionally trained conservator is on Staff (Paid and Unpaid), the <u>Collections Manager</u> should be competent in identifying collections at risk, preventative care for collections and coordinating treatments / stabilization by professional external conservator.
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> An awareness of professional standards, but not always adhered to. <input type="checkbox"/> Roles are not assigned.
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Staff (Paid and Unpaid) have little or no understanding of collections care for the type of collections held in the institution.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Project planning should incorporate allocation of tasks based on collections areas of responsibility.</p> <p>Staff (Paid and Unpaid) should have professional development plans/training in place that allow time to learn basic collections care and management depending on their role.</p> <p>Staff (Paid and Unpaid) should be responsible for drafting basic working procedures for their area of collections care.</p>		
<p><u>Graduate to Gold:</u></p> <p>Assign collections care roles to Staff (Paid and Unpaid) members based on their interests and aptitudes: (See Glossary)</p> <ul style="list-style-type: none"> • <u>Registrar</u> • <u>Curator</u> • <u>Collections Manager</u> 		
<p><u>Graduate to Silver:</u></p> <p>Undertake an exercise to match existing Staff (Paid and Unpaid) to collections roles:</p> <ul style="list-style-type: none"> • Assign collections care areas to each Staff (Paid and Unpaid) member by matching the skill set required for each role. • Make note of any areas where Staff (Paid and Unpaid) have skills gap. • Allocate work time for Staff (Paid and Unpaid) to develop new skills by undertaking related to their collections care role. 		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM6: Does the institution allocate financial resources for the purchase of supplies and services relating to collections care and management?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A12, A16, A59</i></p>	<p>This question is important because it demonstrates the institution is committed to caring for their collections using supplies that will help to ensure the longevity of the collection.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Regular annual budget for collections care and management which take into account the size of your collections and overall budget. <input type="checkbox"/> Material supplies are prioritized based on a <u>Collections Survey [Appendix 1]</u>. <input type="checkbox"/> Purchases are made with the strategic plan in place. <hr/> <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The budget allocation is minimal and only allows for the basics: insurance, pest management, small amount of supplies. <input type="checkbox"/> Base your orders and projects on your <u>Collections Survey [Appendix 1]</u>. <hr/> <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Irregular budget allocation for collections care and management. <input type="checkbox"/> Adhoc purchases made without strategic plan in place.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Use your budget strategically, based on projects and your supplies inventory.</p> <p>Update the <u>Collections Survey [Appendix 1]</u> with any upgrades that are carried out based on your 5-Year Strategic Plan.</p>		
<p><u>Graduate to Gold:</u></p> <p>Undertake a basic <u>Collections Survey [Appendix 1]</u> that will give an overview of what projects and materials are required to upgrade / maintain your levels of collections care.</p> <p>Bulk order materials one year so the next year you can use the budget for ordering other materials.</p> <p>Complete 5-Year Strategic Plan if not already completed.</p>		
<p><u>Graduate to Silver:</u></p> <p>Increase awareness with senior managers / Board of Trustees about the importance of collections care and management and the risks involved if regular maintenance and upgrades are not undertaken.</p> <p>Make a 5-year strategic plan to show senior managers/ Board of Trustees what a small annual commitment to collections care and management can improve. Year 1 should include undertaking a basic <u>Collections Survey [Appendix 1]</u>.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM7: Are written policies and committees in place for accepting and refusing collections?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A2, A10, A12, A13, A14, A15, A16</i></p>	<p>This question is important because:</p> <ul style="list-style-type: none"> • Your institution should be able to justify each acceptance / refusal. • Each object accepted into your collection will cost your institution time and money. • The acceptance or refusal of collections should not be the decision of one person. • The Committees role is to ensure the relevant Policy is being followed and that the object / collection is relevant to the mission / mandate of the institution. • The Committees can protect the institution from accusations of conflicts of interest and/or unethical behaviours. 	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Written policies, approved by the governing body, include: Acquisitions Policy; Deaccession / Disposal Policy; Loans Policy. <input type="checkbox"/> The policies state the decisions that must be taken by the relevant Committee. <input type="checkbox"/> The Annual Report of your institution should include a summary of all approved acquisitions. <input type="checkbox"/> Decisions with justifications are recorded and filed for future reference. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Some policies exist or policies need revision. <input type="checkbox"/> Policies exist but Committee decisions are not included. <input type="checkbox"/> Some Committees exist, but not all and/or they are not effective. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Verbal decisions are made, with little to no documentation of the justification is created. <input type="checkbox"/> Policies do not include the decision points for Committees. <input type="checkbox"/> Committees do not exist or are not active.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>The policies are reviewed annually, updated when required, and any amendments are presented for approval by the governing body.</p> <p>Procedures exist for each policy that indicate when the proposals are forwarded to the relevant Committee.</p>		
<p><u>Graduate to Gold:</u></p> <p>Identify the gap in policies and make a plan to draft what is missing.</p> <p>Discuss the formulation of the missing Committees with senior management.</p> <p>Discuss reformulating the ineffective Committees after analysis and discussion of what is ineffective.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft these policies: Acquisitions Policy; Deaccession / Disposal Policy; Loans Policy (for Incoming and Outgoing loans).</p> <p>Include Committee decision points in related procedures.</p> <p>Form Committees based on the GOLD standard recommendations.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM8: Does the Institution have a transfer of ownership agreement [sometimes called a Transfer of Title or Gift Agreement] that results in legal title of ownership transferring to the institution for all objects that are acquired for the permanent collection?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A9, A15</i></p>	<p>This question is important because:</p> <ul style="list-style-type: none"> • Without a clear Transfer of Title document signed by the owner that transfers ownership to the institution, the institution does not legally own the objects. • Objects should not be accessioned / added to the permanent collection without the transfer of ownership agreement. 	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The Institution has a standard transfer of ownership agreement for 100% of their collections. <input type="checkbox"/> The Institution has a transfer of ownership template that is used in the acquisitions procedure when objects are acquired for the permanent collection. <input type="checkbox"/> The transfer of ownership agreement is a step in the acquisitions procedure. <input type="checkbox"/> The Institution's legal advisor or Board of Trustees has approved the format of the transfer of ownership agreement.
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The Institution has a transfer of ownership agreement for 50-99% of their collections. <input type="checkbox"/> Transfer of ownership agreement exists but it is not consistently used.
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The Institution has a transfer of ownership agreement for 1-49% of their collections.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Review the transfer of ownership agreement every two years minimum.</p> <p>Present the transfer of ownership agreement for legal review every five years.</p>		
<p><u>Graduate to Gold:</u></p> <p>The Institution is attempting to contact owners for the missing transfer of ownership agreements.</p> <p>Include the signing of the transfer of ownership agreement in the Acquisitions Procedure.</p>		
<p><u>Graduate to Silver:</u></p> <p>The Institution is attempting to contact owners for the missing transfer of ownership agreements.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM9: Does a trained, designated person complete a detailed condition report on each object at the time of acquisition and with the record being kept in the master list?</p> <p>Does a trained, designated person complete a detailed condition report on each object every time the object moves in or out of the building and each time the object goes on or off display?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A12, A23, A29, A30, A31, A32, A33, A34</i></p> <p><i>Conservation - B19, B52</i></p>	<p>These questions are important because:</p> <ul style="list-style-type: none"> • Institutions need to be able to demonstrate when and how an object was damaged, and to monitor any change in condition in an object, to understand what action is required to halt deterioration and to protect other objects from similar harm. • This is particularly important for any loan objects. For outgoing loans, you want to be able to make sure your objects are not damaged while they are out of your care. For incoming loans and pending acquisitions, you want to be able to show that you took proper care of all objects in your custody. 	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A trained, designated person completes a detailed condition report on each object at the time of acquisition, including coloured photographs. <input type="checkbox"/> The Collections Management Policy outlines the situations when a condition report is required (loans; moving on or off display; new acquisitions; Deaccessions or disposals). <input type="checkbox"/> The condition reports are dated and saved as PDFs, printed and kept in the paper object files and it added to the collections database (if applicable). <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A Staff (Paid and Unpaid) member is trained on condition reporting but this is not done consistently. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Untrained Staff (Paid and Unpaid) members undertake condition reporting. <input type="checkbox"/> Condition Reports are not completed.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Having multiple Staff (Paid and Unpaid) trained to do condition reports means that if the designated person is not available, someone else can complete this task.</p> <p>Consider including annual condition reporting workshops in your work plans. All trained Staff (Paid and Unpaid) can condition report the same 3-4 objects then critique and compare reports.</p>		
<p><u>Graduate to Gold:</u></p> <p>Add condition reporting steps to each relevant procedure as an essential step.</p> <p>Ensure the designated Staff (Paid and Unpaid) member has enough time allocated in their work plan for condition reporting.</p>		
<p><u>Graduate to Silver:</u></p> <p>Use the suggestions in resources to improve the skills of the Staff (Paid and Unpaid) member for condition reporting.</p> <p>Ask a mentor in another institution or MAS to critique a condition report to indicate areas for improvement.</p> <p>Look at examples of good condition reports that can be found online.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM10: Is there a filing system for collection records?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A39 to A51</i></p>	<p>This question is important because collections records are key primary documents that hold important information about the objects in your collection.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A collections management database or excel spreadsheet is used to manage collections information: acquisitions; detailed object information; locations; condition reports; conservation treatments. <input type="checkbox"/> A full inventory is conducted every 2-5 years and printed annually, with a paper hard copy kept off-site in a secure location. <input type="checkbox"/> The Database/ Spreadsheet is only accessible to Museum Staff (Paid and Unpaid). <input type="checkbox"/> Access to inventory records are addressed in the Institution's disaster response plan. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Object folders exist but only in paper format. <input type="checkbox"/> The database is accessible to non-Museum Staff (Paid and Unpaid) persons, without permission. <input type="checkbox"/> Files and digital folders exist but backups are not done. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Object files are disorganized, and/or incomplete.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure filing steps are recorded in the relevant procedures.</p> <p>Digitize paper documents regularly to avoid a back-log forming.</p>		
<p><u>Graduate to Gold:</u></p> <p>Make a digitization plan: Create digital Object folders by Object Numbers in a secure online and physical location that can be accessed by relevant Staff (Paid and Unpaid).</p> <p>Ask other Staff (Paid and Unpaid) if they might have files or paperwork that relate to the collections. Include copies in the acquisitions folder.</p> <p>Invest in an external hard drive to make back-ups of your digital data.</p>		
<p><u>Graduate to Silver:</u></p> <p>Make a plan to organize the files. State the issues, and what needs to be done. Aim to improve 10 files every week.</p> <p>Use the Object Information forms to record detailed cataloguing information about each object. Write a project plan that will focus on one area of cataloguing at a time.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM11: Are there written procedures for acquiring, borrowing, and lending collections items?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management- A2, A9, A12, A24, A68, A69, A70, A72</i></p>	<p>This question is important because:</p> <ul style="list-style-type: none"> • Staff (Paid and Unpaid) members change over time and people need to know where information is kept, and how to record it. • Acquiring, borrowing and lending collections all involve changing the legal status of an object. 	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Written procedures exist for acquiring / acquisitions; borrowing / incoming loans; lending / outgoing loans. <input type="checkbox"/> These procedures should be based on the policies for each, with procedures detailing each step with examples of documents, folder paths and templates. <input type="checkbox"/> Procedures should include Indexes / Tables of Contents.
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Working procedures exist but these are not written down.
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No procedural information is written down. <input type="checkbox"/> Each transaction is done differently each time it is undertaken.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Procedures should be reviewed annually and/or whenever a policy is updated.</p> <p>Use a procedural check list.</p>		
<p><u>Graduate to Gold:</u></p> <p>The next time one of these transactions is performed, make note of each step that is taken.</p> <p>Add sample documents to the Appendix.</p> <p>Keep the procedures in a Collections Procedures digital folder, as well as in hard copy.</p>		
<p><u>Graduate to Silver:</u></p> <p>Make notes of basic steps, flesh out details at the next opportunity.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM12: Are there written procedures for deaccession and disposal of collection items?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A9, A52 to A60</i></p>	<p>This standard is important because:</p> <ul style="list-style-type: none"> • There should be information recorded about the reasons or justification for each deaccession / disposal. • Collections items that are accessioned into the permanent collections must have a formal deaccession process for potential removal from the collection. • The Institution's Staff (Paid and Unpaid) time and money have been invested in the collections. The decision to deaccession / dispose of collection items should be made by the governing board based on recommendations from the collections staff. 	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Written procedures exist for deaccession and disposal of collection items. <input type="checkbox"/> The written procedures refer to the applicable policy and include the steps for all actions and decision points to enact the policy. <input type="checkbox"/> These procedures should be based on the policies for each, with procedures detailing each step with examples of documents, folder paths and templates. <input type="checkbox"/> Procedures should include Indexes / Tables of Contents.
		<p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Working procedures exist but these are not written down.
		<p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No procedural information is written down. <input type="checkbox"/> Each transaction is done differently each time it is undertaken.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Procedures should be reviewed annually and/or whenever a policy is updated.</p> <p>Use a procedural checklist.</p>		
<p><u>Graduate to Gold:</u></p> <p>The next time one of these transactions is performed, make note of each step that is taken.</p> <p>Add sample documents to the Appendix in your procedural draft.</p> <p>Keep the procedures in a Collections Procedures digital folder, as well as in hard copy.</p>		
<p><u>Graduate to Silver:</u></p> <p>Make notes of basic steps, flesh out details at the next opportunity.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM13: Is there a formal recorded system for numbering, labeling and describing artefacts and archival collections? Is a second copy of the register stored off site?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A39 to A51</i></p>	<p>These questions are important because:</p> <ul style="list-style-type: none"> • The object number is the only way to link the object to the information held in the object files. • Object numbering needs to be consistent for your collection because object numbers must be unique within your Institution. • Physically labeling an object needs to consider the material of the object, the parts and the size of the object. • Describing artefacts and archives should follow professional working standards. • In a disaster scenario, it is essential to be able to access your collections records and you may not be allowed into areas of the building where your records are kept. 	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A collections management database exists with step-by-step procedures for each task that records information about the collection including controlled terminology. <input type="checkbox"/> Procedures or guidelines exist for object numbering and labeling, or these tasks are sub-procedures of the Acquisition Procedure. <input type="checkbox"/> Cataloguing procedures have detailed instructions for describing artefacts and archives. <hr/> <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Numbering, labeling and describing collections (artefacts / archives) is done consistently but the procedures are not written down. <input type="checkbox"/> Collections information is held in paper copies only. <input type="checkbox"/> Older collections are not physically numbered / catalogued. <input type="checkbox"/> Collections are not tagged with archival tags / archival ink. <hr/> <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Collections have been assigned numbers but are not physically numbered, numbered incorrectly, improper materials were used or tag is adhered incorrectly <input type="checkbox"/> Collections do not have object tags. <input type="checkbox"/> Collections information is recorded inconsistently / infrequently.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure procedures and working documents are reviewed and updated on an annual basis.</p> <p>Ensure supplies are always on hand for object numbering demands.</p> <p>Training should be given to Staff (Paid and Unpaid) responsible for physically numbering to ensure complete understanding of how to physically number different materials.</p> <p>If a collections management database exists, someone should be responsible for the overall data management and making sure that data entry follows agreed standards.</p>		
<p><u>Graduate to Gold:</u></p> <p>Draft basic procedural steps for numbering, labelling and describing collections. This should be part of the Acquisition Procedure when objects are added to the permanent collections.</p> <p>Make a plan to tackle the backlog to bring all of the collections to the same standard. Working on the backlog one afternoon a week on a regular basis will help to get things organized over time.</p> <p>Have a supply of acid free object tags and archival ink pens on hand for quick tagging when an object is being handled for another purpose.</p>		
<p><u>Graduate to Silver:</u></p> <p>Write a plan to tackle the numbering / tagging backlog.</p> <p>Draft simple procedures for object numbering, labelling and describing / cataloguing. Aim to improve a minimum number of objects each week.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM14: Do Staff (Paid and Unpaid) perform regular housekeeping in all areas of the facility? Is special training / instruction provided for housekeeping in the collections storage / display areas?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management- A6, A7, A16</i></p> <p><i>Conservation - B2, B7, B23, B70</i></p> <p><i>Storage- C4, C25, C48</i></p>	<p>This question is important because good housekeeping will help to reduce pests, dust, mould and other threats to the collections.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A daily, weekly and monthly housekeeping schedule is maintained and adhered to. <input type="checkbox"/> No food, drinks or water are ever allowed in the display areas or in the collections storage areas. <input type="checkbox"/> Pest traps are in use throughout the building and are checked monthly, with the results recorded on a spreadsheet for tracking threats to collections. <input type="checkbox"/> An Integrated Pest Management plan is part of your Collections Management Manual. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Housekeeping is done in all areas, without any regard for the special needs of the collections areas. <input type="checkbox"/> Pest traps are used but not checked on a regular basis / when checked the results are not recorded. <input type="checkbox"/> Pest prevention steps (allocated food areas, quarantine) are used in an ad hoc manner. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Housekeeping is infrequent, and ad hoc. <input type="checkbox"/> Collections areas do not receive housekeeping. <input type="checkbox"/> Quarantine steps are taken on an ad hoc basis. <input type="checkbox"/> Pest traps are old or never checked.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>The Facilities manager, technicians and housekeeping Staff (Paid and Unpaid) should have a clear understanding of why cleaning is an important aspect of preventative collections care.</p> <p>Regular training should be provided for all Staff (Paid and Unpaid)</p> <p>New Staff (Paid and Unpaid) should be told about the Integrated Pest Management procedures during their induction.</p> <p>Make sure all Staff (Paid and Unpaid) are aware of the Quarantine procedure.</p>		
<p><u>Graduate to Gold:</u></p> <p>List the needs of housekeeping in the collections areas (storage / display). Discuss these needs with Staff (Paid and Unpaid) and decide who will undertake these duties, and what training is required.</p> <p>Write an Integrated Pest Management plan and review this with all Staff (Paid and Unpaid) so they understand the threat that pests present.</p> <p>Write a Quarantine procedure and review this with all Staff (Paid and Unpaid) so they understand the importance of quarantine in safeguarding the collections.</p>		
<p><u>Graduate to Silver:</u></p> <p>Work with the Staff (Paid and Unpaid) to draft a cleaning checklist that includes the collections areas.</p> <p>Draft the main steps for initiating a regular Quarantine procedure.</p> <p>Include the purchase of pest traps in the annual budget. Assign the management of the pest traps to a Staff (Paid and Unpaid) member.</p>		

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure the collections Staff (Paid and Unpaid) always have working copies of documents that outline exhibit plans, collection development ideas and any storage needs.</p> <p>These can be made available to the senior managers for inclusion in the 5-year strategic plans.</p>		
<p><u>Graduate to Gold:</u></p> <p>Review and update the documents and present to senior managers.</p> <p>Be sure to include the overall importance of each area in relation to the Institution being able to fulfill their mandate / mission.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft bullet points for: 5 year outlooks for exhibition planning; collections development; and storage needs.</p> <p>Ensure the Acquisitions procedure refers to the Collections development plans in the decision / approval process.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM16: Does the institution recognize that the collections are held in the public trust?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A1, A2, A4, A5</i></p> <p><i>Storage - C23, C24, C25</i></p>	<p>This question is important because it means that decisions made in relation to the collections are done for the benefit of keeping the collections accessible into perpetuity.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The mission / mandate of the institution makes it clear that the collections are held in the public trust. <input type="checkbox"/> Collections should be as accessible as possible, even when in storage. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The collections are held in public trust but this is not clear in the mission / mandate. <input type="checkbox"/> Collections information is not easily available. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> There is general uncertainty about whether or not the collections are held in public trust. <input type="checkbox"/> Events are held that might confuse the public about the use of the collections.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure that any revision of the mission / mandate maintain this clarity.</p> <p>Have basic collections information online with photographs to encourage accessibility.</p>		
<p><u>Graduate to Gold:</u></p> <p>Suggest a revision to the mission / mandate to make it clear the collections are held in the public trust.</p> <p>Draft a plan to increase the accessibility of collections information.</p>		
<p><u>Graduate to Silver:</u></p> <p>Include clear guidance on the importance of the Institution acting in the best interest of the public trust in all Staff (Paid and Unpaid) inductions.</p> <p>Address any situations that might cause confusion about whether or not the collections are held in the public trust. If there is a charity auction, for example, make sure it is very clear that the objects being auctioned are not from the collections of the Institution.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM17: Does the institution recognize the importance of both the <u>tangible</u> and <u>intangible</u> aspects of an artefact and ensures that all physical attributes are documented?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A4, A39, A43, A44, A47, A49</i></p>	<p>This question is important because it ensures the institution is maximising the potential of their collections as agents of knowledge transmission, for research and display.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Acquisitions and Cataloguing Procedures include steps to record the <u>tangible</u> and <u>intangible</u> aspects of an artefact. <input type="checkbox"/> The <u>intangible</u> aspects of an artefact are given consideration in the Acquisition Procedure. <input type="checkbox"/> 80-100% of the collection has been physically described in the record; <u>intangible</u> aspects have been researched and recorded (if available). <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Cataloguing and Acquisitions Procedures do not include steps to record (some or all of) the <u>tangible</u> and <u>intangible</u> aspects of an artefact. <input type="checkbox"/> Acquisitions are made without adequate consideration of availability of <u>intangible</u> aspects. <input type="checkbox"/> 50-80% of the collection has been physically described in the records; <u>intangible</u> aspects have been researched and recorded (if available). <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Cataloguing and Acquisitions procedures do not exist in written format, process is carried out in an ad hoc manner. <input type="checkbox"/> Acquisitions procedures do not consistently consider provenance or seek supplementary information. <input type="checkbox"/> 1-49% of the collection has been physically described in the records; <u>intangible</u> aspects and provenance have been researched and recorded (if available).

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure adequate time is allocated for the Cataloguing procedure to maintain high recording standards.</p> <p>If a backlog exists, write a Cataloguing plan to address this and aim to complete a manageable amount on a weekly basis.</p>		
<p><u>Graduate to Gold:</u></p> <p>Consider revisions to your Acquisitions Procedure to include asking these questions about proposed acquisitions (or questions that achieve the answers to these) when relevant:</p> <ul style="list-style-type: none"> • Who owned this object before you? (Ideally from the time it was made) • Do any photographs or archival documents exist that show this object (being made / used / worn)? If yes, could we have copies? • For artefacts from First Nations & Métis communities: Is this a recognized sacred or culturally sensitive object? <p>Consider revisions to your Cataloguing Procedure.</p> <p>Draft a plan to increase the number of collection records that have the minimum core data for cataloguing completed / researched.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft Cataloguing and Acquisitions procedures that include the questions / details listed above.</p> <p>Draft a plan to address the backlog of collections information that needs improvement.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM18: Does the institution catalogue Oral histories as artefacts within the collection using the institution's cataloguing procedures?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A39, A44</i></p>	<p>This question is important because it recognizes that oral histories and other <u>intangible</u> collections contain a wealth of information that can be used for research and display purposes. The artefact is not the physical analogue audio medium on which the oral history is record (cassette tape, 8 track tape, reel to reel, CD) but the content of what is said on the recording. It is also essential to have adequate preservation methods in place to ensure the oral history is not lost over time. Like <u>tangible</u> culture heritage artefacts, oral history has key minimum data that should be recorded during the cataloguing procedure. Oral history can put your entire collection in context and should be considered a valuable primary search resource.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 80-100% of the institution's oral history audio media files are recorded, either on paper or in the collections database, with these core cataloguing fields completed. <input type="checkbox"/> 80-100% of the oral history audio media files have been digitized. <input type="checkbox"/> 80-100% of the oral history audio media is stored in conservation grade materials. <input type="checkbox"/> 80-100% of the oral history audio media files have 2 backups: on and off site. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 50-80% of the oral history audio media files have been processed as outlined in Gold status. <input type="checkbox"/> The oral history audio files have been catalogued but not digitized. <input type="checkbox"/> The oral history audio files have been digitized but not catalogued. <input type="checkbox"/> The original audio media are not stored in archival grade materials and backed up on and off site. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 1-50% of the oral history audio media files have been processed as outlined in Gold. <input type="checkbox"/> Some of the files are catalogued, but not consistently. <input type="checkbox"/> Some are digitized. <input type="checkbox"/> Original audio media are not organized/ labeled.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure all new acquisitions of oral history have adequate resources of time and materials to complete the cataloguing, digitization and preservation copy process.</p> <p>If you are less than 100% ensure there is a plan to continue the necessary cataloguing and digitization tasks.</p>		
<p><u>Graduate to Gold:</u></p> <p>Draft a project plan to increase the percentage of properly catalogued / digitized audio files.</p> <p>Prioritize the digitization of your collection because the risk of damage to the physical audio media is great. The cataloguing is important but this can come second.</p> <p>List the materials required to store your original audio media in proper archival materials. Add this to the next budget and / or have on hand in case an opportunity to purchase arises.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a project plan to digitize the audio files.</p> <p>When the digitization is done, address the basic cataloguing requirements and preservation storage issues.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM19: Does the institution recognize and is sensitive to traditional knowledge, issues of cultural appropriation, sensitive materials, and consults with appropriate community representatives to ensure the proper care and use of such materials?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A5, A13, A35, A36, A37, A65, A66, A67</i></p>	<p>This question is important because it shows the institution cares for their First Nations / Métis collections responsibly which is particularly important if these artefacts were collected during a period when there was an imbalance of power between First Nations / Métis communities and colonial settlers and / or colonial administrators. The meaning and value of artefacts might also have been de-valued within First Nations / Métis at some points, from the effects of colonisation, the impact of coercion through religious conversion and other assimilation attempts.</p> <p>Institutions holding collections from First Nations / Métis communities should communicate and seek partnerships with the source communities.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The Collections Management Policy includes guidance for traditional knowledge, <u>cultural appropriation</u>, sensitive and sacred materials. <input type="checkbox"/> Storage, display, handling and treatments for sensitive and sacred artefacts are done with consultation of the cultural representatives from the source communities. <input type="checkbox"/> The institution works with the source communities to develop local skills and resources for managing their cultural collections. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has an inventory of First Nations / Métis collections but the contacts are not in place. <input type="checkbox"/> The institution does not seek approval from regional communities on a consistent basis. <input type="checkbox"/> The institution has only some of the sacred or sensitive materials listed in an inventory. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Artefacts from First Nations / Métis communities are not consistently or wholly identified within your collections. <input type="checkbox"/> Precise source communities have not been identified. <input type="checkbox"/> There is not adequate knowledge about the sacred or sensitive materials that might be in your collection.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Having the policies and local contacts in place is an essential starting point, from which any backlog can be addressed.</p> <p>Consider contemporary collecting from the same source communities to add new comparative examples to your collection for which you will be able to have more detailed <u>intangible</u> and documentary information recorded.</p>		
<p><u>Graduate to Gold:</u></p> <p>Revise the Collections Access policy to include all of the topics listed above after researching best practice in these areas.</p> <p>Reach out to the source community through the Chief and council to identify the best contacts for a cultural advisory committee or cultural representatives.</p>		
<p><u>Graduate to Silver:</u></p> <p>Develop a program to invite cultural representatives and Elders to your institution to help you review your collections for artefacts from their communities.</p> <p>Taking photographs of the artefacts to the communities to a gathering of Elders or having an information table at their tribal AGM would be a good first step.</p> <p>Use the resources listed below to make a list of artefacts that might be sacred or sensitive.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CM20: Does the institution have a written Repatriation Policy or set of procedures for repatriation of First Nations and Métis items consistent with the recommendations of the <i>Task Force Report on Museums and First Peoples</i> (1994)?</p> <p><i>Associated Saskatchewan Museums Standard(s): Collections Management - A61, A62, A63, A64, A65, A66, A67</i></p>	<p>This question is important because it shows that the institution is curating their collections respectfully and responsibly. The institution cannot be held accountable for past practices but the institution is accountable for the policies and procedures that are in place today, and to make sure these reflect the requirements of the task force, namely:</p> <ul style="list-style-type: none"> • Returning all human remains, burial goods and sacred objects to appropriate First Peoples. • Returning objects “of special significance to cultural patrimony”. 	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Written Repatriation Policy is in place with regular review. <input type="checkbox"/> Local First Nations and Métis groups have been consulted about the policy and procedures. <input type="checkbox"/> A full inventory of collections from First Nations and Métis exists. <input type="checkbox"/> Copies have been provided to the relevant groups. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Written, regularly reviewed (every 2-5 years) Repatriation Policy is not in place but the institution is aware of their wider obligations for First Nations and Métis collections. <input type="checkbox"/> First Nations and Métis groups have only partially been consulted. <input type="checkbox"/> Partial inventory of collections from First Nations and Métis groups exists. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution is not aware of Repatriation guidelines or best practice. <input type="checkbox"/> The institution does not have an inventory of First Nations and Métis collections. <input type="checkbox"/> There is little contact with First Nations and Métis groups.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Make engagement with First Nations and Métis groups with objects in your institutions collection a priority.</p> <p>Include contemporary collection from First Nations and Métis in your Collections Development plan.</p>		
<p><u>Graduate to Gold:</u></p> <p>Develop contacts with First Nations and Métis groups. Using the consultation on your drafted Repatriation Policy could be an excellent first project to work collaboratively on.</p> <p>Assign the completion of the inventory of collections from First Nations and Métis groups as a matter of priority to collections Staff (Paid and Unpaid). Invite representatives from First Nations and Métis groups to help with identifications.</p> <p>Invite representatives First Nations and Métis groups to view the collections from their communities and discuss any restrictions regarding handling or use of the collections. Be sure this information is documented in the object records.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a basic Repatriation policy and working guidelines.</p> <p>Assign the creation of the First Nations and Métis collections inventory to a collections Staff (Paid and Unpaid) member.</p> <p>Reach out to local First Nations and Métis groups to assist with the policy, guidelines and identifications in the inventory project.</p>		

Standards for Collections Conservation

Collections conservation covers a range of preventive measures, as well as, conservation treatments. Preventive conservation strives to minimize the causes of deterioration by controlling environmental factors in both the exhibit and storage areas of the institution. This can include everything from how artefacts are handled and transported, to the monitoring and controlling of temperature, relative humidity, and light, to pest management. Collections Staff (Paid and Unpaid) can be trained to undertake preventative collections care and these duties are often part of the tasks in the job description of a [Collections Manager](#).

Treatment conservation involves taking active measures to stabilize or reverse the effects of deterioration on an artefact. Cleaning and artefact stabilization are two examples of conservation treatments. Only an appropriately trained individual, usually called a Conservator, undertakes conservation treatments.

Collections' Conservation Tips and Hints

- Have a wish list with prices / suppliers for materials you would like to order. This is useful for budget planning and if any unexpected monies become available
- Consider dividing the floor plan of your building into zones. Then signs can be posted in each room to indicate which zone the room has been assigned to, and the rules that are in place for each zone.
 - GREEN: Food and drink can be consumed. Food waste can be thrown away here.
 - YELLOW: Food and drink can be consumed occasionally, with thorough cleaning afterwards. Food waste can be thrown away here on the consumption occasions only.
 - ORANGE: Hot drinks and water can be consumed here, with a sealed/sip type lid. No food waste can be thrown away here.
 - RED: Food and drink cannot be consumed or disposed of here.
- Consider displaying digital reproductions of sensitive objects like photographs or works on paper when possible, with the 'real thing' displayed behind a curtain or otherwise concealed for exposure only when the visitor is actually viewing the object
- Digital photographs can be taken with a smartphone but it is better to have a small photography area set up with a tripod, lights and backdrop so the digital photographs are high quality. These can be saved as archival tiffs but reduced in quality for the condition report.
- Always be vigilant for mould. A mould outbreak is a serious indicator of an environmental fluctuation in your space, and can have severe impacts on your collections as well as the health of your Staff (Paid and Unpaid). Seek specialist help immediately when mould is discovered.
- Professional conservation advice does not have to be expensive, there are many free resources and the Canadian Conservation Institute can help

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC1: Does the institution have a written Conservation Policy (or is conservation included in the institution's Collections Management Policy) that outlines conservation standards for care, cleaning, and maintenance of exhibits?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B1, B7, B20, B23, B46, B51</i></p>	<p>This question is important because it shows that the policies reflect the institution's commitment to the long-term care of the collections in their custody, in order to preserve them for future use.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has a written Conservation Policy (or conservation is included in the Collections Management Policy) that includes the conservation standards for the specific collection types held by the institution for the care of the artefacts, as well as for the cleaning and maintenance of the exhibits. <input type="checkbox"/> The related procedures should include preventative care and treatment guidelines for all collection types within the institution: all types of artefacts, archives and library resources. <input type="checkbox"/> The Acquisitions Policy should include a statement to ensure the institution does not accept collections they are unable to care for. The ability to provide proper care for a potential acquisition should be one of the factors considered by the Acquisitions Committee. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The Conservation / Collections Management Policy exists but does not adequately address the needs of the institution. <input type="checkbox"/> The Policy/s and procedures do not include the specific needs of the collections. <input type="checkbox"/> Related procedures are in place but are not written down. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Conservation is not address in any policy. <input type="checkbox"/> Preventative procedures are not undertaken or undertaken on an ad hoc basis.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>The applicable policy/ policy sections should be reviewed on an annual basis.</p> <p>Related procedures should include conservation needs and preventative collections care tasks.</p> <p>If your collections include any material types that are particularly sensitive or potentially hazardous the policy / procedures should address these issues.</p>		
<p><u>Graduate to Gold:</u></p> <p>Have the relevant policy / policy section reviewed by a professional Conservator for suggestions on areas for improvement.</p> <p>Research the preventative conservation needs for your collection.</p> <p>Make a plan for drafting procedures related to the preventative conservation and conservation tasks.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a basic Conservation Policy / policy section within the Collections Management Policy using these headings: Ethical Guidelines for Conservation; Priorities for Conservation; Staff (Paid and Unpaid) responsibilities and Roles related to Conservation; Standards for Conservation of Collections.</p> <p>Make a plan to draft related preventative procedures.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC2: Does the institution use preventive conservation measures to provide a safe and stable environment for artefact and archival collections?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B1, B7, B8, B23 to B37</i></p>	<p>This question is important because it ensures the artefact and archive collections are being kept in the best possible conditions to ensure their long-term preservation.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Guidelines exist for all aspects of preventative conservation for collections care that address the needs of the different collection types within the institution. <input type="checkbox"/> Conservation / archival grade materials are used by the institution for storage / packing of collections. <input type="checkbox"/> Integrated Pest Management procedures are in place. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Guidelines exist for some but not all of the collections type within the institution. <input type="checkbox"/> Guidelines exist for some but not all of the environmental factors. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A general idea of the environmental conditions exists but nothing is written down. <input type="checkbox"/> A general idea of types of preventative collections care exists but nothing is written down or done consistently.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure guidelines are kept up to date through a regular review process.</p> <p>Ensure any new collections Staff (Paid and Unpaid) are trained on the basic preventative collections care methods.</p> <p>Any new acquisitions should have the ideal storage / display conditions noted.</p>		
<p><u>Graduate to Gold:</u></p> <p>Make a basic list of the different collection types within your institution:</p> <ul style="list-style-type: none"> • Research the ideal environmental conditions for storage and display for each of the collection types. • Draft additional guidelines to address these collection types. 		
<p><u>Graduate to Silver:</u></p> <p>Using the <i>Further Resources Section</i> that outline the different areas for preventative conservation care, list what your current situation is for storage and display areas.</p> <ul style="list-style-type: none"> • Compare what you have listed with the suggested standards. • Make a plan to improve one area at a time. 		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC3: Does the institution engage in conservation planning?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B1, B38, B42, B43, B46, B50, B51</i></p>	<p>This question is important because it allows the institution to be proactive and prioritise conservation requirements for the collection.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Regular <u>Collections Survey</u> [Appendix 1] are undertaken / updated to identify artefacts that require conservation treatment. If you have a collections database, this information can be stored and updated in the object record. <input type="checkbox"/> Exhibit planning allows time for conservation treatment. <input type="checkbox"/> Treatments are prioritized based on the overall priorities for collections planning (exhibit, research). <input type="checkbox"/> If needed, external conservators are engaged to undertake conservation treatments when resources are available. <input type="checkbox"/> The regular purchase of archival grade materials should be included in the institution's budget. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A general idea of conservation priorities exists but there is no complete overview of the conservation condition of the collection. <input type="checkbox"/> Collections database does not include conservation assessment Information. <input type="checkbox"/> Conservation treatments are not based on exhibit or collections planning priorities. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Not sure about any conservation needs for the collection. <input type="checkbox"/> Conservation work is not planned or happens on an ad hoc basis without considering priorities in relation to risk to collections or exhibit priorities.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure your collections condition survey is updated regularly if you use this method.</p> <p>If you record conservation assessments in your database this should be on the main object record, with a 'priority for treatment' field that has a controlled pick list using a 1-5 ranking that clearly states which is most / least urgent.</p>		
<p><u>Graduate to Gold:</u></p> <p>Allocate time to undertake a <u>Collections Survey</u> to identify any immediate treatment priorities [Appendix 1].</p> <p>From now, include a conservation assessment of all new acquisitions and record this information in the collections database / <u>Collections Survey</u> [Appendix 1].</p>		
<p><u>Graduate to Silver:</u></p> <p>Using the <u>Collections Survey</u> [Appendix 1], make a start at listing any known areas of concern within the collection.</p> <p>Record basic conservation conditions for all new acquisitions.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC4: Does the institution ensure that orientation and training is provided for all Staff (Paid and Unpaid) involved in artefact handling, artefact transportation including proper health and safety methodology? Does the institution provide training for all Staff (Paid and Unpaid) for integrated pest management [IPM]?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B7, B8, B10, B11, B12, B23</i></p>	<p>These questions are important because it shows that the institution uses training for Staff (Paid and Unpaid) to ensure artefacts receive the highest standard of care, that Staff (Paid and Unpaid) are aware of health and safety best practice for artefact handling (including proper procedures for heavy lifting, handing lead artefacts, trolleys, ladders, cables / cords, stacking shelves efficiently and using portable steps) and that all Staff (Paid and Unpaid) are aware of the requirements for an integrated pest management plan.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> All Staff (Paid and Unpaid) who will be handling artefacts should be given training on object handling. <input type="checkbox"/> Firearms and ammunition are only handled by authorized, licensed Staff (Paid and Unpaid). See Section G. Risk Management in the MAS Standards Document. <input type="checkbox"/> Trained Staff (Paid and Unpaid) pack artefacts for transportation. <input type="checkbox"/> All Staff (Paid and Unpaid) are aware of the integrated pest management plan and what their responsibilities are. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Not all Staff (Paid and Unpaid) dealing with collections have had the required training. <input type="checkbox"/> Required storage accessories (pallet jacks, step ladders, portable steps) are not in place or are not available in all storage locations. <input type="checkbox"/> Staff (Paid and Unpaid) generally follow food and drink consumption guidelines but this is not enforced. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Few Staff (Paid and Unpaid) have received proper training in relation to collections handling, packing for transportation, artefact movements and integrated pest management rules. <input type="checkbox"/> Storage accessories are inadequate. <input type="checkbox"/> Food and drink consumption guidelines are in place but not followed.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure all new Staff (Paid and Unpaid) are familiar with artefact handling, health and safety in relation to collections best practice.</p> <p>Provide regular opportunities for Staff (Paid and Unpaid) to refresh their skills.</p> <p>Ensure there is an easy reporting process for any pest sighting.</p>		
<p><u>Graduate to Gold:</u></p> <p>Draft a collections specific orientation document for new Staff (Paid and Unpaid).</p> <p>Add a collections agenda point to Staff (Paid and Unpaid) meetings and use the opportunity to remind all Staff (Paid and Unpaid) about guidelines that are in place that apply to everyone in order to safeguard the collections.</p>		
<p><u>Graduate to Silver:</u></p> <p>Plan a series of regular training workshops to upgrade the essential skills required by Staff (Paid and Unpaid). Many resources can be found online, in webinars or videos.</p> <p>Make a list of required storage accessories with their costs and request these are included in the next annual budget.</p> <p>Review why food and drink consumption guidelines are not being followed. Sharing the pest related consequences of spills and crumbs might remind Staff (Paid and Unpaid) that their workplace has unique requirements.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC5: Does the institution ensure that all artefacts have their condition recorded after entering the building; prior to leaving the building; before going on display; after coming off display and otherwise updated / checked on a regular basis?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B7, B15, B19, B46, B51, B53, B54, B61, B70</i></p>	<p>This question is important because it ensures that the condition of the artefacts is recorded whenever the artefact is changing location. This will help to identify any damage immediately, which can then help to reduce the risk of further damage to the artefact or to others artefacts.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Condition reports are undertaken or updated when objects change location. <input type="checkbox"/> Using a <u>Collections Survey [Appendix 1]</u>, for basic condition checks can be an efficient way to monitor the overall condition of your collections in storage. <input type="checkbox"/> Condition reports should always include detailed colour photographs that are annotated to show any areas of loss / wear. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Condition reports are undertaken but not consistently / not when objects change location. <input type="checkbox"/> Some areas of the collection have no recorded condition statement. <input type="checkbox"/> No standard template for condition reports is used. <input type="checkbox"/> Not all of the collections Staff (Paid and Unpaid) are trained on condition reporting. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Condition reports are completed on an ad hoc, infrequent basis. <input type="checkbox"/> Relevant Staff (Paid and Unpaid) have not been trained on condition reporting. <input type="checkbox"/> Condition report formats vary.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure all procedures that involve object movements have condition reporting built in as a procedural step.</p> <p>Staff (Paid and Unpaid) responsible for condition reports should include refreshing their skills on their work plans.</p> <ul style="list-style-type: none"> • Set aside a few hours for all Staff (Paid and Unpaid) who do condition reports to report on a group of objects. • Staff (Paid and Unpaid) can compare / critique their condition reports to improve their skills. 		
<p><u>Graduate to Gold:</u></p> <p>Review procedures and add condition reporting at the places indicated above.</p> <p>Undertake the <u>Collections Survey [Appendix 1]</u> as a starting point and prioritise detailed condition reports for any problem areas.</p> <p>Draft a standard condition report with controlled terminology.</p> <p>Plan a condition reporting workshop for collections Staff (Paid and Unpaid) to learn this essential skill.</p>		
<p><u>Graduate to Silver:</u></p> <p>Link condition reporting to object movements.</p> <p>Have tables available for laying objects out during the movement process to ensure condition reporting can take place.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC6: Does the institution monitor temperature, relative humidity [RH], pollutants, and pests on a regular basis and make changes as required throughout the entire institution? (or in the case of multiple buildings, each building?)</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B23 to B31</i></p>	<p>This question is important because it shows the institution is committed to making their environment safe for collections for long-term storage and display. It also ensures the collections will not be damaged by preventable environmental factors.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Storage and display areas should have temperature and relative humidity monitors from which data is collected from on a regular basis (ideally monthly). <input type="checkbox"/> The institution has a central heating, ventilation and air conditioning [HVAC] system with generator back up to prevent any sudden changes in climate. The temperature and relative humidity should be monitored by the Facilities team and set to a consistent, steady climate specific to each area of the building. <input type="checkbox"/> An Integrated Pest Management Policy and related procedure is in place. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Environmental conditions are not tracked in all of the storage / display locations. <input type="checkbox"/> Integrated Pest Management is performed on an ad hoc basis. <input type="checkbox"/> HVAC system is inadequate or performs poorly. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No Integrated Pest Management takes place. <input type="checkbox"/> No central HVAC exists.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Make sure a designated Staff (Paid and Unpaid) member has allocated time to perform the environmental monitoring duties on a monthly basis.</p> <p>Emergency planning procedures should include checking all collections storage areas following power cuts to ensure the environmental climate controls are functioning.</p>		
<p><u>Graduate to Gold:</u></p> <p>Consider purchasing additional environmental monitors.</p> <p>Assign the monitoring of the environmental conditions to one Staff (Paid and Unpaid) member.</p> <p>Assign the Integrated Pest Management Procedures to one Staff (Paid and Unpaid) member.</p> <p>Consider upgrading your HVAC. This will be an expensive undertaking but there are grants available.</p>		
<p><u>Graduate to Silver:</u></p> <p>Assign Integrated Pest Management to one Staff (Paid and Unpaid) member.</p> <ul style="list-style-type: none"> • Purchase pest traps and record the pests on a monthly basis. • Ask all Staff (Paid and Unpaid) to report any sightings of any pests in the building and have bags/ forms on hand. 		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC7: Does the institution calibrate and verify their monitoring devices on a regular basis?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B28</i></p>	<p>This question is important because it shows the institution has committed resources for the proper monitoring of the environments where their collections are stored and displayed.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Annual allocation in the budget to cover the costs of calibrating the monitoring devices. <input type="checkbox"/> Having a verification system in place. <input type="checkbox"/> Monitoring devices have their data verified on a monthly basis, and are sent out for calibration on an annual or bi-annual basis. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Monitoring devices are sometimes calibrated but this is done on an irregular basis. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Recalibrations have never happened. <input type="checkbox"/> The institution does not have an environmental monitoring system in place.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Verify the monthly monitoring reports when you analyze the data.</p> <p>Assign the annual calibrations to one Staff (Paid and Unpaid) member.</p>		
<p><u>Graduate to Gold:</u></p> <p>Draft a recalibration schedule and buy additional monitors if needed for covering places left without a monitor.</p> <p>Contact the manufacturer of the equipment to ask the recommended recalibration period and the costs associated with the recalibration.</p> <p>Request adding the costs of the recalibration to the annual budget.</p> <p>Assign one Staff (Paid and Unpaid) member to coordinate the annual recalibration task.</p>		
<p><u>Graduate to Silver:</u></p> <p>Consider ordering additional monitors to replace the existing equipment while they are sent out for recalibration.</p> <p>Using the steps outline for SILVER, make a plan to improve the recalibration schedule as soon as possible.</p> <p>Invest in an environmental monitoring system.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC8: Does the institution eliminate all daylight from storage areas and monitored and controlled in exhibit areas using UV filters, and blinds?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B32 to B37</i></p>	<p>This question is important because it shows the institution is committed to the long-term preservation of their collections in storage and display. It also shows the institution recognizes the harm that exposure to light and UV can cause to sensitive collections.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Each display area should be measured for UV and lux conditions, with measures taken to reduce these to acceptable limits. <input type="checkbox"/> Display areas should be kept completely dark when not open to visitors, with no natural light. <input type="checkbox"/> Storage areas should not have any natural light and should be kept in darkness when Staff (Paid and Unpaid) are not present. <input type="checkbox"/> Light sensitivity is recorded in object records. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Lux and UV are unknown for display areas. <input type="checkbox"/> Natural light exists in storage / display areas. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No consideration has been given to environmental monitoring, light or UV.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Using a floor plan of the institution undertake a weekly survey of collections spaces where there is natural light for a one year period to understand any seasonal fluctuations in lux and UV.</p> <p>Use window film to eliminate UV from display areas with natural light.</p> <p>Have rotation plans for all organic / light sensitive collections.</p> <p>Include recording the light sensitivity of objects in the acquisitions process.</p> <p>Track display / light exposure periods for objects and ensure they have adequate rest periods.</p>		
<p><u>Graduate to Gold:</u></p> <p>Investigate ways to screen / shade natural light in storage and display areas.</p> <p>Investigate UV filters for windows that are near storage and display areas.</p> <p>Purchase (or borrow) a light / lux and UV meter to measure your storage and display spaces. Record these at different times of the year and at different times of day.</p>		
<p><u>Graduate to Silver:</u></p> <p>Include guidelines for environmental monitoring, light and UV in the Collections Management policy draft</p> <ul style="list-style-type: none"> If you have any organic collections, printed paper, or fine art you should research the proper guidelines for these collections because they are extremely sensitive and overexposure to light will lead to fading. 		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC9: Does the institution kept artefacts away from incandescent lights and never use them inside exhibition cases?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B37, B57, B58, B59</i></p>	<p>This question is important because incandescent lights give off heat and can explode, both of which will damage collections. This heat is intensified with in an exhibition case causing damage to occur quicker.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No incandescent lights are used throughout the institution. <input type="checkbox"/> Incandescent lights are never used inside exhibition cases. <input type="checkbox"/> Florescent lights are not used in collections areas. <input type="checkbox"/> LED lights are used in the exhibit areas and in display cases. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Some incandescent lights are used in the institution. <input type="checkbox"/> Some florescent lights are in use in collections areas. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Incandescent lights are used in collections / exhibit areas. <input type="checkbox"/> Florescent lights are in use in collections areas.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure the Facilities team understand the importance of light bulb choices in regard to the potentially negative impact on the collections.</p>		
<p><u>Graduate to Gold:</u></p> <p>Work with the Facilities team to phase out the use of incandescent lights.</p> <p>Suggest phasing out the use of florescent areas in collections areas.</p>		
<p><u>Graduate to Silver:</u></p> <p>Work with the Facilities team to raise awareness of the dangers of the incandescent lights in collections / exhibit areas to make the replacing of these lights a high priority for senior managers.</p> <p>Make a medium-term plan to replace florescent lights in collections areas.</p> <p>Working with the Facilities team, outline the reasons why LED lights should be used and provide support for a long-term plan to upgrade the institutions lighting infrastructure.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC10: Does the institution always consult Professional conservation advice before undertaking any conservation treatments?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B38, B39</i></p>	<p>This question is important because it demonstrates the institution is committed to the long-term preservation of their collections and the institution recognizes the potential harm that can be done by untrained Staff (Paid and Unpaid).</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution consults a professional conservator for advice before undertaking any conservation treatments. <input type="checkbox"/> If no conservator is on Staff (Paid and Unpaid), the collections Staff (Paid and Unpaid) undertake training to understand basic collections care for the types of collections held by the institution. <input type="checkbox"/> If no conservator is on Staff (Paid and Unpaid), the collections Staff (Paid and Unpaid) are knowledgeable about signs to watch for in relation to the types of risks that are typical for their collections, and the basic stabilization steps to take if an issue arises. <input type="checkbox"/> Conservation policy and procedures should be included in your Collections Management Policy and procedures or exist as a stand-alone policy. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Conservation is not included in the Collections Management policy. <input type="checkbox"/> Staff (Paid and Unpaid) have a general awareness of conservation principles. <input type="checkbox"/> The institution does not have any contact with a professional conservator for advice. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Conservation treatments are not a priority for collections care. <input type="checkbox"/> Objects are not checked for conservation requirements on a regular basis. <input type="checkbox"/> Objects requiring conservation languish in storage.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure any treatment undertaken is documented first with a Treatment Proposal which is then approved by a senior manager, followed by a Treatment Report [see sample form in MAS Collections Documentation Manual] which lists all of the steps taken and the results. Treatment Proposals and Treatment Reports should be illustrated with detailed digital photographs. These records should be kept in the relevant object file.</p> <p>Professional conservators should also use these forms. Ensure their proposed treatment is signed off by a senior manager before the treatment proceeds.</p>		
<p><u>Graduate to Gold:</u></p> <p>Expand the Collections Management Policy and procedures to include conservation details that are tailored to your collection types and Staff (Paid and Unpaid) capabilities.</p> <p>Undertake a <u>Collections Survey</u> [Appendix 1] to identify the types of conservation issues that might arise within your collections and research basic stabilization techniques.</p> <p>Join an internet forum where you can seek informal advice from conservation professionals.</p>		
<p><u>Graduate to Silver:</u></p> <p>Make a basic list of the types of collections held by your institution, including date of creation and material type, even if the actual numbers are just estimated.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC11: Does the institution only use conservator approved / archival grade products on and around artefacts?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> <i>Conservation - B43, B44, B51, B63</i></p> <p><i>Storage - C10 to C15</i></p>	<p>This question is important because it demonstrates the institution is willing to invest the resources required to provide acceptable standards of care for the objects in their collections. Products that are conservator / archival grade are made so they do not contain harmful chemicals that will cause deterioration in your objects over time. These products might look identical to what you might find in commercial retail stores but the chemical structures are different.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> All collections supplies are ordered from suppliers of archival grade products. <input type="checkbox"/> Archival grade products are stored in the collections areas and used only for collections and related documents. <input type="checkbox"/> The annual budget includes a regular allocation for the purchase of archival grade products. <hr/> <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution uses a mix of archival grade and non-archival grade products for collections care. <input type="checkbox"/> Archival grade products are stored with non-archival grade products. <input type="checkbox"/> The budget allocation is irregular. <hr/> <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Archival grade products are not used regularly. <input type="checkbox"/> Non-archival grade products are generally considered to be the same as archival grade products.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Maintain a list of archival products your institution uses and be sure to replenish supplies on a regular basis to avoid running out.</p> <p>Be sure to communicate the importance of using these products to senior managers so the budget makers understand the reason for this regular expense.</p>		
<p><u>Graduate to Gold:</u></p> <p>Any product that comes in direct contact with an object or archive should be of archival grade. List the products in use that are not archival grade and research the price of the archival grade equivalent. Using the same budget allocation, propose ordering from archival grade suppliers and explain the importance of using only archival grade products.</p> <p>Find a suitable storage space for the archival grade products and move them into this area. This will help to ensure the expensive products are not used for non-collections purposes.</p>		
<p><u>Graduate to Silver:</u></p> <p>Find examples of deterioration caused by the use of non-archival grade materials and advocate for an annual budget allocation from senior managers.</p> <p>Try to replace one product at a time with the archival grade equivalent.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC12: Does the institution assign one or more individuals to be responsible for routine inspection and maintenance of all exhibits and storage areas?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> <i>Conservation - B1, B19, B24, B25, B46, B50</i></p> <p><i>Storage - C42, C43</i></p>	<p>This question is important because it shows the institution is committed to collections management/conservation and monitoring. Detecting issues that might affect the collections as early as possible is essential in order to mitigate the overall impact.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> One or more individuals perform a regular inspection of the exhibits and storage areas using a checklist of what to look out for. <input type="checkbox"/> This inspection should be done on a weekly basis. The inspection should also include any off-site storage areas. <input type="checkbox"/> The division of responsibilities for the maintenance of the exhibit / storage areas should be clearly defined. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Inspections are infrequent or irregular but occur a few times a year. <input type="checkbox"/> Inspections do not include all collections areas. <input type="checkbox"/> Different Staff (Paid and Unpaid) perform the inspections on an ad hoc basis. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Inspections are irregular / infrequent / occur less than a few times a year. <input type="checkbox"/> No check list exists. <input type="checkbox"/> Staff (Paid and Unpaid) are unsure what to make note of during inspections.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>If the regular person is on leave or the post is vacant be sure this essential function is temporarily assigned to another Staff (Paid and Unpaid) member. Cross-train other Staff (Paid and Unpaid) to perform this function as required.</p> <p>Inspection records should be scanned and digitally stored in case they need to be consulted in the future.</p> <p>The inspection procedure should include clear guidance on what actions to take if an issue is identified. If the problem is not reported immediately, the inspection might as well not have been done.</p>		
<p><u>Graduate to Gold:</u></p> <p>Create an inspection schedule and assign this task as a regular duty to allocated Staff (Paid and Unpaid) members.</p> <p>Create an inspection check list.</p> <p>Provide training to Staff (Paid and Unpaid) assigned to ensure inspections are done to a consistent standard.</p>		
<p><u>Graduate to Silver:</u></p> <p>Increase the frequency of the inspections.</p> <p>Provide training on observations that require immediate action.</p> <p>Ensure Staff (Paid and Unpaid) know the steps to take if a problem is identified.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC13: Does the Institution have and adhere to a regular cleaning schedule for collections spaces and the collections?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> <i>Conservation - B46, B50, B51</i></p> <p><i>Storage - C41, C42, C43</i></p>	<p>This question is important because it shows the institution is committed to taking preventative measures that will help to keep collections spaces and collections clean.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A regular cleaning schedule is in place for collections spaces. <input type="checkbox"/> A regular cleaning schedule is in place for cleaning objects on display. (Objects in storage should not require cleaning if the storage spaces are dust free and collections are housed in suitable storage enclosures (boxes, drawers). Objects in cases should not require cleaning if the cases are properly sealed.) <input type="checkbox"/> When displays are changed, part of the changeover should include moving the cases to clean under them. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Cleaning of collections spaces and oversized objects on display is infrequent or occurs a few times a year. <input type="checkbox"/> Staff (Paid and Unpaid) are not formally trained on the requirements for cleaning in collections spaces or objects on display. <input type="checkbox"/> Underneath display cases are not cleaned often. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Cleaning of collections spaces and oversized objects on display occurs less than once a year. <input type="checkbox"/> Staff (Paid and Unpaid) are not trained or the task is undertaken by different people. <input type="checkbox"/> Display areas are not cleaned regularly.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure Staff (Paid and Unpaid) are cross trained to avoid any gaps in schedule without cleaning if someone is on leave or the post is vacant.</p>		
<p><u>Graduate to Gold:</u></p> <p>Create a cleaning schedule to increase the frequency of the cleaning.</p> <p>Provide training for cleaning Staff (Paid and Unpaid) so they can clean oversized objects on display.</p> <p>Purchase necessary equipment like a HEPA vacuum so that objects can be cleaned without any risk of damage.</p> <p>Build the time to clean underneath empty display cases into display changeover procedures.</p>		
<p><u>Graduate to Silver:</u></p> <p>Increase the frequency of the cleaning of collections spaces and oversized objects so that it happens more often.</p> <p>Allocate the cleaning tasks to individuals so they can improve their skills over time.</p> <p>Include cleaning in display spaces in the regular cleaning duties.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CC14: Does the institution have a written policy that prevents First Nations and Métis items that may be considered sensitive from being photographed, numbered, exhibited, replicated or used in programming?</p> <p><i>Associated Saskatchewan Museums Standard(s): Conservation - B20, B21, B22, B67</i></p>	<p>This question is important because institutions holding sensitive collections from First Nations and Métis communities have an obligation to consult with these groups about <u>any</u> use of collections that originate from their community members, whether the object is considered sensitive or not. This obligation should be understood as a unique opportunity to engage with community members for the overall benefit of increasing collections knowledge and understanding. For sensitive objects (including photographs), this obligation is of greater importance because these collections are culturally sensitive and improper use is gravely insulting and offensive to First Nations and Métis community members.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A written policy includes an appendix listing the First Nations and Métis collections that are considered sensitive. This can be included in the Collections Management Policy. <input type="checkbox"/> A written policy lists the actions that are acceptable in general and actions that require consultation with the First Nations and Métis communities. When in doubt, consultation should take place. <input type="checkbox"/> The collections database / object records indicate any sensitive collections with the details about the sensitivity. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> There is no written policy relating to sensitive objects from First Nations and Métis but general consideration is given when an object is known to be sensitive. <input type="checkbox"/> Contact with First Nations and Métis communities is infrequent or the Institution is not sure who to contact. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The unique requirements for First Nations and Métis collections are not considered. <input type="checkbox"/> There is no understanding of which First Nations and Métis collections might be considered sensitive.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure the policy is reviewed and updated on a regular basis.</p> <p>Contacts from the First Nations and Métis communities should be invited to comment on the policy.</p> <p>The First Nations and Métis communities should receive the list of the sensitive objects.</p>		
<p><u>Graduate to Gold:</u></p> <p>Create a basic inventory of the collections from First Nations and Métis communities. Include the community name when known. Allocate Staff (Paid and Unpaid) time and resources to contacting the cultural representatives in known / likely source communities to open the discussions to indicate the sensitive collections and consult on the policy draft.</p>		
<p><u>Graduate to Silver:</u></p> <p>Identify the First Nations and Métis collections held by your institution.</p> <p>Invite relevant cultural authorities for a site visit, to walk through your storage areas to identify collections that might be from their community, as well as any that should be given special consideration as sensitive collection.</p>		

Standards for Collections Storage

Special consideration regarding the nature of artefacts being stored is required. Different sizes of artefacts, their materials, composition, and construction determine how they are handled and stored.

Collections' Storage Tips and Hints

- The person responsible for monitoring the pest traps should be aware of different life stages for pests to determine the time frame for the potential dangers the pest poses.
- It may be overwhelming to think of improving all of the storage conditions at one time. Make a working rule to improve the mount / enclosure for each object that is being returned to storage. For example: objects removed for research or objects returning after exhibition.
- Consider seeking volunteers or interns to work on re-packing projects. Re-packing projects are also an opportunity for digitization (taking photographs) and standardizing cataloguing details. Regular volunteers or interns can be trained on the process and can accomplish a great deal in a short time with minimal supervision. Volunteers / interns tend to enjoy projects where they can work directly with collections.
- The physical housing for collections is their first line of defense against environmental degradation and other potentially damaging activities. Using acid free, archival / conservation grade materials ensures the collections will not be damaged by their enclosures over time.
- Boxes should have a complete list of the object numbers contained within written on their lid and the side facing out on the shelf. There should also be a coloured photograph of the contents included on the outside of the box. Finally, boxes should have the permanent storage location written on them, so they can be easily returned.
- Emergency tasks should be listed in the Emergency Preparedness Plan but not necessarily assigned to a specific person in case that person is not available during the emergency. Staff (Paid and Unpaid) should be cross-trained to deal with multiple responsibilities during an emergency.
- The Emergency Preparedness Plan should include details for emergencies that might affect your entire community or only your Institution. Partners can be pre-planned to assist with emergency response from other local institutions (libraries, archives, galleries) or from outside of your region.
- Cloud storage might be a cost-effective option for offsite storage but be sure to investigate security risks and access especially if data is stored outside of Canada.
- Born digital collections should follow the same acquisitions procedure as physical collections
- The museum **MUST** store sensitive First Nations and Métis items in a separate location from the rest of the collections. Access to sensitive First Nations and Métis artefacts should only be granted to traditional practitioners.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CS1: Are there designated artefact and archives storage areas? Is the storage area inaccessible to the general public? Do the storage areas meet conservation standards and practices?</p> <p><i>Associated Saskatchewan Museums Standard(s): Storage - C5, C6, C22, C23, C24, C49 to C55</i></p>	<p>These questions are important because designated storage areas allow institutions to properly safeguard the collections that are in their custody.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The designated storage space for artefacts and archives has a locked door. <input type="checkbox"/> The designated storage space is only accessible to collections staff. <input type="checkbox"/> Collections storage areas have environmental controls based on the requirements of the collections stored there. <input type="checkbox"/> Basic conservation standards and practices for collections storage areas. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Not all collections are stored in secure areas. <input type="checkbox"/> Not all storage areas have environmental controls. <input type="checkbox"/> Not all collections are stored off the floor. <input type="checkbox"/> Some wooden storage furniture is used. <input type="checkbox"/> Quarantine procedures are in place but not always followed. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The majority of the collections storage spaces do not have secure restricted access. <input type="checkbox"/> Collections are mixed by sizes, materials and status. <input type="checkbox"/> Quarantine procedures are not in place.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Make sure storage for all new acquisitions is given adequate consideration in the approval process.</p>		
<p><u>Graduate to Gold:</u></p> <p>Review use of existing storage space for improvement. Consider removing any non-collections materials that may be intermixed with collections in storage spaces.</p> <p>Develop a non-collections retention schedule for annual review for any non-collections items that are in storage.</p> <p>Draft a list of storage improvements and make a medium-term plan to upgrade furniture in each annual budget.</p> <p>Refresh training on quarantine procedures.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a list of people that need access to collections storage to perform their job. This will likely include: Security, Facilities, Conservator, Registrar and Collections Manager. Work with the Security and Facilities team to reduce non-essential access.</p> <p>Undertake a storage assessment by listing storage area contents on a floor plan and analyzing to see where improvements can be made.</p> <p>Draft quarantine procedures for collections spaces. This is particularly important for any organic materials that are easily preyed upon by pests.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CS2: Are collections storage rooms and the collection routinely inspected, monitored and changes made when required?</p> <p><i>Associated Saskatchewan Museums Standard(s): Storage - C42, C43, C45, C48</i></p>	<p>This question is important because regular inspection and monitoring will ensure that any problems are noted and dealt with immediately before becoming bigger issues.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> HOBO / portable RH and climate monitors are in place in all collections storage and display areas or are in use sporadically. <input type="checkbox"/> Environmental monitor readings are downloaded and analyzed monthly with any peaks or troughs investigated. <input type="checkbox"/> Pest traps are checked on a monthly basis as part of the Integrated Pest Management plan. The traps are changed on a regular basis. <input type="checkbox"/> Collections Staff (Paid and Unpaid) are always vigilant for insect infestations in collections storage areas. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Environmental monitors are not in use in all storage and display areas. <input type="checkbox"/> Data is not downloaded and analyzed on a regular basis. <input type="checkbox"/> Pest traps are not checked regularly. <input type="checkbox"/> Collections Staff (Paid and Unpaid) are not familiar with signs of insect presence in collections. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Environmental monitors are not in use or need to be upgraded. <input type="checkbox"/> Pest traps are not checked or are not in place.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure Staff (Paid and Unpaid) are cross trained so they can do monitoring duties when someone is away or on leave.</p> <p>Make sure all files are organized for easy retrieval and future comparisons as needed.</p>		
<p><u>Graduate to Gold:</u></p> <p>Research the costs of adding additional environmental monitors to the storage and display spaces. Request the full or partial amount in the next annual budget until all of the monitors have been purchased.</p> <p>Allocate the download and analysis of the data from the monitors to a Staff (Paid and Unpaid) member to perform on a monthly basis.</p> <p>Allocate the monitoring of pest traps to a regular Staff (Paid and Unpaid) member.</p> <p>Organize a workshop to familiarize Staff (Paid and Unpaid) with pest residue for pests that are attracted to your collections.</p>		
<p><u>Graduate to Silver:</u></p> <p>Make a short and medium term plan to improve the environmental monitoring situation. Each space should have at least one monitor.</p> <p>Order pest traps from one of the museum grade suppliers listed in this document and allocate the placement and monitoring to a regular Staff (Paid and Unpaid) member.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CS3: Are artefacts stored according to their condition, material composition, and size to ensure long-term preservation?</p> <p><i>Associated Saskatchewan Museums Standard(s): Storage - C1, C3, C10 to C21</i></p>	<p>This question is important because storing collections by size, material and condition allows efficiency in storage and in maintaining an environment that will optimise their condition into the future.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Objects in storage are organized by size, then material. <input type="checkbox"/> Object locations are recorded either in a collections management database or an excel inventory list. <input type="checkbox"/> No collections are stored directly on the floor. <input type="checkbox"/> Oversize objects stored on the floor rest on a support and/or pallet (ideally aluminum). <input type="checkbox"/> Small and medium sized objects are stored on supports / trays so they do not need to be handled. <input type="checkbox"/> Acid free boxes containing collections have an inventory list on the outside and photographs of the contents. This avoids unnecessary opening/handling of the contents. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Some collections are stored appropriately, but not the whole collection. <input type="checkbox"/> Collections are not stored using archival grade materials. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Collections are stored haphazardly, with little consideration to size or material type. <input type="checkbox"/> Archival / conservation grade materials are not used.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Materials orders should be made regularly to ensure a constant supply for proper storage.</p> <p>New acquisitions should have storage materials considered during the acquisition proposal process.</p>		
<p><u>Graduate to Gold:</u></p> <p>List areas where storage needs to be improved. Prioritise the list based on possible risk to collections.</p> <p>Create a list of materials needed for the improvements.</p> <p>Draft a long-term plan to improve a little bit at a time.</p>		
<p><u>Graduate to Silver:</u></p> <p>Undertake a basic collections storage survey.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CS4: Are all display cases, storage rooms, cabinets, shelves clearly numbered? Are all boxes labelled?</p> <p><i>Associated Saskatchewan Museums Standard(s): Storage - C6, C13</i></p>	<p>This question is important because this is an essential step in having inventory control over your collections.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> All locations where collections are stored or displayed need to have a location that hierarchically lists the location from general to specific. <input type="checkbox"/> A floor plan with shelves / cases should be available to show all of the numbered locations. PowerPoint can easily be used to make a floor plan using the insert>shapes functions. <input type="checkbox"/> Boxes are labeled with the object numbers contained within, ideally with a photograph of the objects (even a photo of the open box is sufficient). <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Not all storage / display locations are recorded on a floor plan. <input type="checkbox"/> Not all locations are physically marked with their shelf numbers. <input type="checkbox"/> Box inventories are incomplete. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No storage / display locations have assigned locational numbers. <input type="checkbox"/> Display cases do not have locational numbers.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Be sure to update the floor plan with any additions or removals of display cases and/or storage furniture.</p> <p>Be sure storage and display locations are referenced in your object records or inventory list.</p>		
<p><u>Graduate to Gold:</u></p> <p>Make a plan to record storage / display locations on room specific floor plans.</p> <p>Physically mark storage locations with their applicable sub number within the room>cabinet and then record these on the floor plans.</p> <p>Make a plan to inventory boxes in storage. Include repacking into acid free boxes, padding with acid free tissue nests, photography for posting on the outside of the box and preparation of the inventory list as required.</p>		
<p><u>Graduate to Silver:</u></p> <p>Create a floor plan of all storage and display spaces by hand and then use software like PowerPoint to create a digital plan.</p> <p>Work through each storage and display space and assign cabinet / case / shelving unit numbers, and then drawer / shelf numbers for the storage location.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CS5: Does the institution take appropriate measures to ensure the safety and security of artefacts and archival items in its care?</p> <p><i>Associated Saskatchewan Museums Standard(s): Storage - C1, C22, C41, C42, C43, C49 to C56</i></p>	<p>This question is important because the overall long-term custody and care of the collections relies on security and preventative measures for safety being in place.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Collections preparedness and response are included in the institution's Emergency Response Plan, Collections Management Plan. <input type="checkbox"/> General security alarm systems are in place in all of the collections storage and display areas. <input type="checkbox"/> Collections storage areas should be locked with access allowed only for collections Staff (Paid and Unpaid). <input type="checkbox"/> Risk management procedures are regularly reviewed and updated as part of an overall Emergency Response Plan. <input type="checkbox"/> All Staff (Paid and Unpaid) with access to collections storage areas follow guidelines described in the Collections Management Plan. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Collections needs are not included in Security / Safety Policies. <input type="checkbox"/> Emergency Response Plan is incomplete or inadequate for the potential emergencies the Institution might encounter. <input type="checkbox"/> Access to collections storage areas is not restricted or not enforced. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Security / Safety Policies do not exist. <input type="checkbox"/> The Emergency Response Plan does not include special consideration for collections. <input type="checkbox"/> There is an overall lack of consistent regulation of entry into collections storage spaces.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Policies that include collections security and safety should be reviewed and updated on an annual basis.</p> <p>Incident reports should be reviewed with procedural updates as required.</p>		
<p><u>Graduate to Gold:</u></p> <p>Review the Security / Safety Policies and incorporate sections to address collections spaces.</p> <p>Form an Emergency Response Plan to work on updating the plan and training Staff (Paid and Unpaid). Planning a regular meeting helps to keep the working group engaged.</p> <p>Include collections spaces access in the Collections Management Policy to list the Staff (Paid and Unpaid) and the level of access for collections storage spaces.</p>		
<p><u>Graduate to Silver:</u></p> <p>Meet with management/ Board to raise the need of a Safety and Emergency Response Policy for the institution.</p> <p>Include access guidelines for collections spaces that lists acceptable reasons for entering the space, and the positions that typically would need to enter the area.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CS6: Does the institution use methods and materials for storing and exhibition of artefacts and archives collections that promote their preservation?</p> <p><i>Associated Saskatchewan Museums Standard(s):</i> <i>Conservation - B23 to B37, B46 to B70</i></p> <p><i>Storage - C1 to C21</i></p>	<p>This question is important because it demonstrates the institution is committed to the long-term preservation of their collections, and that the institution understands that materials used, and methods of storage / display have an impact on the longevity of an object.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Acid free, archival / conservation grade materials should be used for any storage enclosure. <input type="checkbox"/> Exhibited artefacts should have mounts / plinths with barriers that protect the object. <input type="checkbox"/> Mannequins should be properly padded to support clothing. <input type="checkbox"/> Soft artefacts should be properly padded when stored and displayed to keep their shape. <input type="checkbox"/> Archives should be kept in acid free boxes with inner folders / dividers / Mylar sleeves to protect the pages. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Not all collections are stored in acid free, archival / conservation grade materials. <input type="checkbox"/> Exhibited artefacts are not all displayed to current standards of best practice. <input type="checkbox"/> New material are meeting standards. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Few collections are stored using archival / conservation grade materials. <input type="checkbox"/> Exhibited artefacts are not fully supported or displayed without barriers to protect from painted surfaces.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure supplies of archival / conservation grade materials are ordered on a regular basis and well in advance of any large acquisition or exhibit rotation.</p> <p>Part of the exhibit procedures should include adequate consideration to the best method to display an object so that it is fully supported while in the display case.</p>		
<p><u>Graduate to Gold:</u></p> <p>Undertake a basic <u>Collections Survey</u> [Appendix 1] to list the areas where improvement for storage materials is required.</p> <p>List the artefacts on display that need to have their mounts improved. You may need to consult with a conservator or exhibition preparator to discuss the best options.</p>		
<p><u>Graduate to Silver:</u></p> <p>Using the steps outlined to improve from SILVER to GOLD, begin with the basic overview of the situation and prioritise the improvements based on overall risks to the collections.</p> <p>Consider temporarily removing objects from display to improve mounts / padding or plan an exhibit closure period to insert mylar barriers where required.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CS7: Has the Institution developed and implemented strategies to ensure the long-term availability of digital materials in its collections?</p> <p><i>Associated Saskatchewan Museums Standard(s): Storage - C1, C2, C20, C21</i></p>	<p>This question is important because if the institution has invested resources in digitising collections, or accepted born-digital collections, these digital materials must be available and preserved for long-term access with the same consideration given to analogue/ non-digital collections.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Digital files should be stored on a secure server and/or (external hard drive). <input type="checkbox"/> Digital files can be managed using a Digital Asset Management system [DAMs] or your collections management database. <input type="checkbox"/> Digital materials are catalogued into the institution's Collections Management Database. <input type="checkbox"/> All digital files should be given a meaningful name to indicate the contents. This should be included as a task in any digitization project. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Digital files are not regularly back up or copied to a server. <input type="checkbox"/> Not all digital files are in accessible formats recommended by archivists. <input type="checkbox"/> Not all digital files are fully catalogued. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Digital files are not organized and formats are inconsistent. <input type="checkbox"/> Digital files are not stored on a server that is backed up daily. <input type="checkbox"/> Digital files are not catalogued.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure all new digitization projects or additions to the collection consider the long-term preservation of the digital files.</p> <p>Check server space regularly to ensure adequate storage is available.</p>		
<p><u>Graduate to Gold:</u></p> <p>Include the regular back up of digital files in the Collections Management Policy.</p> <p>Make a plan to convert digital files to formats recommended by archivists.</p> <p>Make a plan to catalogue digital files that are not fully catalogued.</p>		
<p><u>Graduate to Silver:</u></p> <p>Organize folders on a server and request personal copy all digital collections files (documents and photographs) to reduce the possibility of data loss.</p> <p>Allocate a person to go through the copied back log files and organize a new filing structure and instruct Staff (Paid and Unpaid) to use this system moving forward.</p> <p>Ensure the server is backed up on a regular basis.</p> <p>Consider making additional back-ups on external hard drive.</p>		

Standards for Collections Research

Public institutions have a responsibility to create and advance knowledge and understanding about their collections. Equally important is ensuring this knowledge is made available to the communities the institution serves. The research activities undertaken by the institution are therefore an important way to demonstrate its commitment to the public and fulfill its public trust responsibilities. Research activities can be undertaken by institutional Staff (Paid and Unpaid) as well as outside researchers. Regardless of how it is conducted, research must be grounded in best practices and adhere to ethical guidelines.

Collections' Research Tips and Hints

- Research should always be encouraged but it must be a controlled process to ensure that there is a mutual understanding in place between the Institution and the researcher.
- Ensure your Research Request Form is simple to complete and applicable to a range of research requests, from interested members of the public to academic researchers.
- Interns and volunteers should be encouraged to undertake collections research.
- Consider using interlibrary loans programs through your local community library, college or university to access books and journals that relate to your collections.
- Copies of articles related to the collections should be kept in a central digital folder so that different research projects can use the same resources.
- Research on First Nations and Métis collections should always include consultation with the living communities. Publications by non-community members, including anthropologists, should be understood as a single point of view. Certain Elders within First Nations and Métis groups will usually have specific cultural knowledge about objects and traditions. Information shared from Elders should be sought as a primary resource, with the understanding that not all knowledge can be shared with outsiders.
- Institutions should seek research partners from New Comers, First Nations & Métis communities for all projects, not just projects related to collections from these communities. Knowledge is held in First Nations & Métis communities that relates to all disciplines and projects should always seek to include this knowledge.
- Exhibit content at your Institution should reflect the diversity of your local community.
- Copyright is particularly important for archives (photographs, paper, film, audio files) and artwork because these collections are easily reproduced and the person making a new copy can claim copyright of the copy they make.
- Translating oral history files is an essential step of the cataloguing process. The dialects of some First Nations and Métis, Newcomer languages can be difficult for community members to understand as the language evolves over time.

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CR1: Does the institution have a written research policy based on the code of ethics for researchers?</p> <p><i>Associated Saskatchewan Museums Standard(s): Research - D1, D2</i></p>	<p>This question is important because it demonstrates the institution is committed to encouraging research on their collections and maintaining best practice for research.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has a written Research Policy based on the Code of Ethics for Researchers. The policy statements regarding research requests pertaining to First Nations and Métis collections. <input type="checkbox"/> Where relevant, First Nations and Métis and Newcomer communities have been consulted on the Research Policy. <input type="checkbox"/> A Research Request form [Appendix 3] is used to record the formal research request. This form should also be used to record the approvals. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The Institution has a written Research Policy that needs to be reviewed and / or revised based on the Code of Ethics for Researchers. <input type="checkbox"/> The Research Policy does not include specific guidelines for First Nations and Métis and Newcomer collections. <input type="checkbox"/> Request procedures do not have a clear approval process. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The Research Policy is inadequate, or not written. <input type="checkbox"/> No consideration is given to First Nations and Métis and Newcomer communities in the existing policy or procedures. <input type="checkbox"/> No clear approvals process.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure the Research Policy is reviewed annually.</p> <p>Ensure all collections access procedures include an approval step that checks the Research Policy before allowing access to collections for any research purpose.</p>		
<p><u>Graduate to Gold:</u></p> <p>The Staff (Paid and Unpaid) responsibility for collections access should review Code of Ethics for Researchers and review the existing Research Policy.</p> <p>Include provisions for First Nations and Métis and Newcomer collections. Reach out to local First Nations and Métis and Newcomer communities to ask community cultural leaders to review the revised policy.</p> <p>Draft a Research Request form to include in the procedures that accompany the revised Policy.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a Research Policy based on existing practice, incorporating the Code of Ethics for Researchers.</p> <p>Draft basic procedural guidelines based on existing practice with a clear approval step</p> <p>Include guidelines for access to First Nations and Métis and Newcomer collections.</p> <p>Draft a basic form for research requests and approval.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CR2: Does the institution conduct research on the collections?</p> <p><i>Associated Saskatchewan Museums Standard(s): Research - D3 to D8</i></p>	<p>This question is important because it demonstrates the institution is committed to using their collections to the maximum extent, for engagement and to enrich understanding of their collections. The institution should ensure that Staff (Paid and Unpaid) time is used wisely, and that research projects are focused with specific outcomes in mind.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Research is documented within the collections management database or within paper files to enhance the object records. <input type="checkbox"/> Research results are shared in a public environment: on social media, exhibits, websites, articles, newsletters, publications, conferences. <input type="checkbox"/> Staff (Paid and Unpaid) contracts and related policies make clear statements about Intellectual Property rights regarding ownership of research conducted during working hours. (See Section I. Information Management: Intellectual Property in the MAS Standards document.) <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Research is performed on an ad hoc, inconsistent manner. <input type="checkbox"/> Research results are not always shared in a public format. <input type="checkbox"/> Research results are not always recorded or documented in association with the collection. <input type="checkbox"/> Research results are not always organized so they are available for future investigations. <input type="checkbox"/> Staff (Paid and Unpaid) contracts do not include an Intellectual Property clause. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Very little collections based research is undertaken by Staff (Paid and Unpaid). <input type="checkbox"/> Research projects are informal, large in scope, or rarely completed. <input type="checkbox"/> Some areas of the collections are better researched than others.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Encourage Staff (Paid and Unpaid) to share results of research projects within the institution with regular, informal in house talks.</p> <p>Research projects using the collections should also include the mandate / mission of the Institution in the desired outcomes.</p> <p>Include research projects in annual work plans for Staff (Paid and Unpaid).</p>		
<p><u>Graduate to Gold:</u></p> <p>Include collections research in annual work plans for all collections Staff (Paid and Unpaid) and investigate the possibility of interested non-collections Staff (Paid and Unpaid) engaging in a research project.</p> <p>Include summarizing the research outcomes in the collections database or object files as part of the research project.</p> <p>Raise the need for an Intellectual Property clause with Human Resources or Senior Managers to try to get this included in future contracts.</p>		
<p><u>Graduate to Silver:</u></p> <p>Encourage collections Staff (Paid and Unpaid) work plans to have a minimum regular amount of time allocated to research projects.</p> <p>Use a project-planning template to organize the research [Appendix 2].</p> <p>Make a brief list of the collections areas with an indication of how much research has been undertaken, and list the locations where the outcomes of the research are stored. Any areas that are not well researched should be the priority for future projects.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CR3: Does the institution take a multi-disciplinary approach to basic research in order to ensure the benefits of a diversity of perspectives?</p> <p><i>Associated Saskatchewan Museums Standard(s): Research - D5, D6</i></p>	<p>This question is important because it demonstrates the institution is committed to a scholarly, unbiased and objective approach to the research on their collections.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> All research projects include multi-disciplinary approaches to ensure a diversity of perspectives. <input type="checkbox"/> All research projects follow a standard procedure that starts with a proposal and approval process. <input type="checkbox"/> Research Proposals should incorporate partners from other disciplines including First Nations and Métis and Newcomer, where appropriate. <input type="checkbox"/> Research results should be reviewed at set project milestones to ensure the quality of the research being performed. <input type="checkbox"/> Research results should be publically presented. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Basic research does not always include multi-disciplinary approaches. <input type="checkbox"/> Local community groups are not always considered potential project partners for different research perspectives. <input type="checkbox"/> Research projects are not always completed or do not always achieve the intended results. <input type="checkbox"/> Research results are not presented / reported to the governing board, membership or for public scrutiny. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Basis research rarely includes multi-disciplinary approaches or diverse perspectives. <input type="checkbox"/> Local community groups are not seen as potential partners for research projects or as a source of new perspectives.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Review the research proposal and approval process on a regular basis, not less than every two years.</p> <p>Internal reviews of research proposals should suggest relevant partners.</p> <p>Make sure research proposals have clear accountability for the time and resources spent on the project.</p>		
<p><u>Graduate to Gold:</u></p> <p>Draft a research proposal template and procedure to improve the organization and accountability for new projects.</p> <p>Encourage new reporting methods for existing projects.</p> <p>Organize focus groups from local communities where research projects can be discussed in an informal setting to gather new perspectives.</p>		
<p><u>Graduate to Silver:</u></p> <p>Organize focus groups from local communities to discuss the remit of the Institution, the collections, and gather new ideas for research partnerships based on the interests of the local community groups. This could also include possible grant funded projects.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CR4: Does the institution conduct research that interprets significant stories and themes for the collection and for developing programs and services?</p> <p><i>Associated Saskatchewan Museums Standard(s): Research - D4, D5, D6</i></p>	<p>This question is important because it demonstrates the Institution is aware that objects can be examined from a multitude of perspectives, and the potential objects carry for telling stories and narratives that can be used to engage visitors. Naturally an institution will focus on stories, themes and narratives that allow the collection to demonstrate aspects of the mandate / mission.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has a research plan related to the strategic development plan. <input type="checkbox"/> The institution's research plan aims to interpret stories and themes that draw on the strengths of the collections. <input type="checkbox"/> The written research plan is related to existing or developing programming and services. <input type="checkbox"/> The institution's mission / mandate is used to guide the research plan. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution's research plan is not written or has not been written with regard to the strategic development plan. <input type="checkbox"/> The institution's research plan only partially relates to stories and themes that draw on the strength of the collections. <input type="checkbox"/> Programming and service for future planning only partially relates to the research plan. <input type="checkbox"/> The research plan does not fully relate to the mission / mandate. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No written overall research plan exists. <input type="checkbox"/> The institution does not have an overall 3- 5-year strategic development plan. <input type="checkbox"/> The institution does not have a forward plan for programming and services.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>The research plan should be reviewed on a regular basis to ensure continued relevance to the strategic development plan.</p> <p>A high-level research plan should be approved by the governing body.</p> <p>New acquisitions should be considered for research potential and how these might fill any gaps in interpretative stories and themes.</p> <p>A long term (3 to 5 year) plan for programs and services should be reviewed to ensure any research requirements are completed in a suitable time frame.</p>		
<p><u>Graduate to Gold:</u></p> <p>Consider revising the research plan to tailor it to the strategic development plan.</p> <p>Consider revision the strategic development plan to include/consider</p> <ul style="list-style-type: none"> • summarizing the research requirements for delivering the vision. • stories and themes that are related to the strength of the collections. • the requirements for providing content for programming and service plans. • to better reflect the mission / mandate. If the focus of the institution has shifted, the mission / mandate may require a review as well. 		
<p><u>Graduate to Silver:</u></p> <p>Senior managers should draft a 3 –5-year strategic development plan for approval by the governing body.</p> <p>Staff (Paid and Unpaid) can use the strategic development plan</p> <ul style="list-style-type: none"> • to draft a high-level research plan for approval by the governing body. • to draft a forward plan for programming and services for approval by the governing body. 		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CR5: Does the institution have a written policy defining copyright, so that research can be made publicly accessible?</p> <p><i>Associated Saskatchewan Museums Standard(s): Research - D7, D8</i></p>	<p>This question is important because the Institution must have a full grasp on the copyright statuses for their collections before they can make them available to other researchers. The policy ensures that copyright is shared or made available on an equal basis for the public.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> A written policy defining copyright exists for the Institution. <input type="checkbox"/> Incoming acquisitions include a copyright statement on the transfer of title form to indicate if copyright is being transferred to the Institution or not. <input type="checkbox"/> Research agreements should include a copyright statement to ensure the researcher understands that copyright of the collections is not transferred as part of the research process. <input type="checkbox"/> Reproduction requests for collection images should be made using a form that indicates permissions are given for the requested use only. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution addresses copyright on a case by case basis with no general policy or procedure. <input type="checkbox"/> Some acquisitions have clear copyright transfer statements, but this is not consistent for the whole collection. <input type="checkbox"/> The institution tries to respect copyright laws but this is inconsistently enforced. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Copyright is not consistently considered. <input type="checkbox"/> Collections are acquired without copyright details.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>All new collections acquired should have a signed statement of copyright that accompany them. Either the copyright is transferred from the owner to the institution; the owner agrees to share copyright with the institution OR the copyright is not transferred.</p> <p>If copyright is not transferred this should be clear at the acquisition proposal stage so the acquisition decision is made with the full facts.</p> <p>The institution might choose not to accept a collection that does not come with at least shared copyright because this will restrict them from full use of the collection.</p> <p>Make sure all Staff (Paid and Unpaid) are aware of your copyright obligations, for using content found elsewhere within your institution and when permitting your collections to be replicated.</p>		
<p><u>Graduate to Gold:</u></p> <p>Allocate a Staff (Paid and Unpaid) member to research copyright details that relate to your collections to draft a copyright policy.</p> <p>Review any collections access procedures to include a step to determine copyright.</p> <p>List the institutions collections without clear copyright and make a plan to deal with the back log. In many cases the copyright will likely be transferred without an issue.</p> <p>Provide training and information to Staff (Paid and Unpaid) who deal with collections and copyright issues.</p>		
<p><u>Graduate to Silver:</u></p> <p>Hold a workshop for all Staff (Paid and Unpaid) to review the basic principles of copyright.</p> <p>Review the acquisitions procedures and proposal forms to include transfer of copyright information.</p> <p>Ensure any transfer of title forms include a clear copyright statement.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CR6: Does the institution have a written policy concerning access of the collection to outside researchers?</p> <p><i>Associated Saskatchewan Museums Standard(s): Research - D1, D10 to D14</i></p>	<p>This question is important because the policy will ensure that access to the collection is equal for all researchers. The policy should indicate acceptable types of research projects, and encourage access for all levels of research, from school children to academics to interested community members. The policy should be weighted to encourage access to the collection, with reasonable time frames to accommodate requests based on Staff (Paid and Unpaid) resources and amount of collection that access is requested for and the availability of secure space for the researcher to work in.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has a written policy that outlines access of the collection for outside researchers. <input type="checkbox"/> The institution has a clear procedure for research requests. <input type="checkbox"/> The institution has a Research request form [Appendix 3] for use by external researchers. <input type="checkbox"/> First Nations and Métis and Newcomers are consulted when research requests are received for collections from their communities. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institutional policy needs to be updated. <input type="checkbox"/> There is no related procedure for research requests. <input type="checkbox"/> First Nations and Métis and Newcomers communities are not always consulted. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No research policy is in place. <input type="checkbox"/> Research access is ad hoc and informal. <input type="checkbox"/> First Nations and Métis and Newcomers communities are not consulted when access to collections from their communities is requested.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure all Staff (Paid and Unpaid) who can grant access to the collection are aware of the request form and procedure.</p> <p>Request copies of all publications resulting from research on your collections.</p> <p>Ensure the policy and procedure are reviewed regularly.</p>		
<p><u>Graduate to Gold:</u></p> <p>Assign the review of the policy to one person to draft in an agreed timeframe.</p> <p>Draft a procedure based on the existing working practices related to the policy.</p> <p>Make a list of contact details for First Nations and Métis and Newcomers communities so they can be consulted quickly when required.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a basic research policy considering any collections that might need special considerations.</p> <p>Draft a basic research request procedure.</p> <p>Meet with all Staff (Paid and Unpaid) who allow collections access and discuss the new policy and procedure.</p> <p>Allocate the approvals to a senior Staff (Paid and Unpaid) member responsible for collections.</p>		

Standard(s) Based Questions	Why it is Important	Performance Indicators
<p>CR7: Does the institution have a written policy concerning oral history and fieldwork based on current principles and standards developed by professional associations and practitioners and provide training to ensure that all interviews are conducted in accordance with the law and within the scope of the project?</p> <p><i>Associated Saskatchewan Museums Standard(s): Research - D15 to D23</i></p>	<p>This question is important because it demonstrates the institution is aware of the legal and ethical responsibilities for collecting oral history, as well as best practice for fieldwork.</p>	<p><u>Gold:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution has a written policy for oral history, with related procedures that ensures that all activities are conducted in accordance with the law and best practice guidelines. <input type="checkbox"/> Oral history is done to satisfy the needs of the institution's research plan. <input type="checkbox"/> Consent forms are used for oral history and community fieldwork. <input type="checkbox"/> Oral history files are catalogued similar to object records. <input type="checkbox"/> Personal information is kept confidential. <input type="checkbox"/> Participants in oral history are made aware of the use of their information. <p><u>Silver:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> The institution conducts oral history but the policy and related procedures do not reflect the existing practices. <input type="checkbox"/> Some oral history files are not fully catalogued or digitized. <input type="checkbox"/> Consent forms are used on an ad hoc basis. <input type="checkbox"/> Staff (Paid and Unpaid) are not always trained on interview techniques or on the proper use of recording equipment. <p><u>Bronze:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> No policy exists related to oral history collections. <input type="checkbox"/> Procedures for gathering oral history, cataloguing and long term management of these collections are not clear or unwritten. <input type="checkbox"/> Oral history quality varies, both in content and recording.

How to Improve/Maintain	Date Completed	Notes
<p><u>Maintain Gold:</u></p> <p>Ensure the policy and procedures are reviewed on a regular basis.</p> <p>Staff (Paid and Unpaid) working on oral history projects should receive training on effective interview techniques and in the use of all recording equipment.</p> <p>Oral history files should be considered unique, primary resources and safeguarded as such.</p>		
<p><u>Graduate to Gold:</u></p> <p>Make a plan to</p> <ul style="list-style-type: none"> • complete the cataloguing of the oral history files • digitize the oral history files that exist in analogue form only <p>Try to get consent forms signed retroactively. Without a consent form, it is not advisable to use the oral history file.</p> <p>Create guidelines for interview techniques.</p> <p>Create a manual for the proper use of the recording equipment.</p> <p>Consider holding a Staff (Paid and Unpaid) training workshop prior to any oral history gathering project.</p>		
<p><u>Graduate to Silver:</u></p> <p>Draft a policy for oral history collections.</p> <p>Draft working procedures for gathering oral history, cataloguing the files and how the files should be managed in the long term.</p> <p>Make a unified consent form.</p> <p>Halt any existing projects until training can be provided for Staff (Paid and Unpaid).</p>		



Consider Developing or Review and Possibly Revising

- Your Collections Management Plan and/or Policies
- Your Collection Management forms including donor, accession, loan and deaccession
- Your Collections Committee policies and produces, including your Acquisition Committee Policies
- Plan for the governing board (or management) to work with the collections personal to make sure everyone is informed and adhering to the same standards
- Conducting a collections inventory/ collections survey yearly [Appendix 1]
- Create a place to re-house a portion of a collection in proper materials such as acid-free folders yearly
- Your Emergency Preparedness Plan
- Your Disaster Policies and Kits
- Your Research Policy
- Plan and implicate procedures for dealing with Found in Collections objects and/or in complete loan/gift agreements
- Establishing and maintain a housekeeper plan
- Plan to address storage and exhibition needs for specific types of collections items (ex. Padded clothing hangers)
- Create and maintain environmental monitoring and/or control plans
- Conduct and/or review condition records for all at risk artefacts in the collection
- Create a schedule for digital backups of collection systems/ databases

MAS Performance Indicators Glossary

Collections Manager: responsible for collections storage and display conditions; storage housing for collections; managing Integrated Pest Management procedures; managing collections related emergency planning procedures; object handling; condition reporting; preventative conservation. Collections management work requires hands on activities with the collection; ability to organize storage; ability to follow procedures; basic awareness of collections environmental conditions; basic awareness of collections storage requirements based on material types; an understanding of risks to specific object types within the collections.

Collections Survey: a task performed to get an overall view of the current state of collections. It can be as detailed or as general as required for the desired outcomes. See Appendix 1.

Cultural Appropriation: “Cultural appropriation is the adoption or use of elements of one culture by members of another culture. Cultural appropriation is seen as controversial, even harmful, notably when the cultural property of a minority group is used by members of the dominant culture without the consent of the members of the originating culture; this is seen as misappropriation and a violation of intellectual property rights.”

https://en.wikipedia.org/wiki/Cultural_appropriation

Curator: responsible for collections research; collections queries; detailed cataloguing of collections; explaining collections to the public in a variety of methods tailored to the audience. Curatorial work requires research skills and an interest in learning more about the details of the collection, dealing with members of the public, and being able to present information in different formats for a variety of audiences.

Intangible aspects of an artefact: The intangible aspects of an artefact can be understood as the non-physical things that makes this artefact important, usually in relation to your collecting area, and the non-physical things that help this artefact to demonstrate your mission / mandate: the person who made it (from the community you collect from); the period it was made; where or how it was used (within your collecting area or community); who owned it. These details will be recorded as the object history or biography, which is also part of the provenance. Recording these details is essential to make the artefact relevant. Most artefacts are not that valuable without these types of details. Having photographs or other documents that illustrate these intangible aspects adds enormous value to the object, because these are the details that will make the object relevant to exhibitions and for display.

Registrar: responsible for inventory of collections; tracking object entry/exit; tracking legal status of collections; managing acquisition and de-accession procedures; arranging for access to collections; insurance values. Registrar work requires a high level of attention to detail; ability to complete paperwork; ability to follow administrative procedures; organizational skills; ability to create and maintain filing systems.

Tangible aspects of an artefact: what can be physically ‘touched’ or seen: the materials, the techniques, the style of decoration / motifs, any inscriptions or makers’ marks – the physical attributes.

Further Resources

General:

American Alliance of Museums (US): www.aam-us.org

British Columbia Museums Association: museumsassn.bc.ca

Canadian Museum of History: www.historymuseum.ca

International Council for Museums (ICOM): www.icom.museum

Nova Scotia Museum: museum.novascotia.ca

The National Parks Service (US): www.nps.gov

Collections Management and Research:

Art Gallery of Ontario: www.ago.net

Canadian Museum Association's Ethical *Guidelines 1999*:
www.museums.ca/uploaded/web/docs/ethicsguidelines.pdf

Convention on the International Trade of Endangered Species of Wild Fauna and Flora (CITES) 1973:
www.cites.org/eng/disc/text.php

Government of Canada's *Caring for Sacred and Culturally Sensitive Objects*:
canada.pch.gc.ca/eng/1448995219999

Government of Canada's *Collections Management Software Criteria Check List 2012*:
canada.pch.gc.ca/eng/1443120174242

Government of Canada's *Cultural Property Export and Import Act (R.S.C., 1985, c. C-51)*:
laws-lois.justice.gc.ca/eng/acts/C-51/

International Council for Museums (ICOM)'s Code of Ethics for Museums:
archives.icom.museum/ethics.html

International Institute for the Unification of Private Law (Unidroit) Convention, 1995:
www.unidroit.org/instruments/cultural-property/1995-convention

Museum Association of Saskatchewan's *Collections Document Manual for Saskatchewan Museums 2014*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Standards for Saskatchewan Museums 2016*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: Acquisition Evaluation (2014)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: Collecting Oral Histories (2014)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: Deaccessioning Artefacts from the Collection (2017)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: Governance-Museum Board Basics (2015)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: How to Label Historical Artefacts (2016)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: Mission Based Collecting (2014)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: Oral History in Museum Exhibitions (2014)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: Photographing Artefacts for Collections Documentation (2017)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Association of Saskatchewan's *Tip Sheet: Understanding Provenance (2013)*. Available via the MAS Office and MAS Website: saskmuseums.org

Museum Pests: museumpests.net/identification/identification-resources/

The Canadian Chapter of the International Society of Appraisers: www.isa-appraisers.ca

The Collective Trust (UK): www.collectionstrust.org.uk

The Freedom of Information and Protection of Privacy Act:
www.qp.gov.sk.ca/documents/English/Statutes/Statutes/F22-01.pdf

The Hague Convention for the Protection of Cultural Property in the Event of Armed Conflict, 1954:
portal.unesco.org/en/ev.php-URL_ID=13637&URL_DO=DO_TOPIC&URL_SECTION=201.html

The National Gallery of Canada: www.gallery.ca/en

The University of British Columbia's *Museum of Anthropology*: moa.ubc.ca

United Nations Educational, Scientific and Cultural Organisation (UNESCO) Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, 1970:

www.unesco.org/new/en/culture/themes/illicit-trafficking-of-cultural-property/1970-convention/

Washington Conference on Principles on Nazi-Confiscated Art, 1998:
www.state.gov/p/eur/rt/hlcst/122038.htm

Conservation and Storage

Canada Conservation Institute (CCI): www.cci-icc.gc.ca

Canada Conservation Institute (CCI)'s Notes: canada.pch.gc.ca/eng/1439925167385

CoOL: Conservation Online: www.cool.conservation-us.org

Digital Preservation Coalition: handbook.dpconline.org

Museum Display Case Specifications: museumdisplaycase.com

Northeast Document Conservation Centre: www.nedcc.org

Appendix I – Collections Survey

Collections Survey: a task performed to get an overall view of the current state of collections. It can be as detailed or as general as required for the desired outcomes. Use an excel spreadsheet with the headings shown here, then work systematically through the collections storage.

1. Examiner/s – Initials of people performing the survey
2. Date of Surveyed
3. Object Name
4. Accession Number
5. Registration Comments
6. Artefact Location
7. Collection Status—Loan/Permanent Collection
8. Number of Components
9. Condition: Structural (Excellent/ Good/ Fragile/ Poor)
10. Condition: Surface (Excellent/ Good/ Fragile/ Poor)
11. Condition Comments (Brief Notes)
12. Light Sensitivity (The Wool Rating)
13. Relative Humidity and Temperature Sensitivity (High/ Medium/ Low)
14. Hazard (List nay hazards present: food/ Lead/ Sharp/ Splinters/ Toxic/ Weapon)
15. Mould Evidence (None/ Passive/ Unknown)
16. Pest Evidence (None/ Passive/ Unknown)
17. Treatment Needed (Average/ Minor/ Major/ None)
18. Treatment Comments (Cleaning/ Reshaping/ Stabilization/ Consolidation/ Remove/ etc.)
19. Conservation Storage: Exhibit (High/ Medium/ Low/ Not Applicable)
20. Conservation Priority: Exhibit (High/ Medium/ Low/ Not Applicable)
21. Conservation Comments (Rehousing/ Research Need)
22. Length
23. Width
24. Height
25. Depth
26. Current Packing (What does it contain)
27. Packing Needed (What is it)
28. Display Mount Needed (Custom/ Head/ Mannequin/ Wall Mount)
29. Display Mount Measurements
30. Ideal Storage (Large Drawer/ Large Shelf/ Medium Drawer/ Small Drawer/ Oversized/ Roll/ small shelve/ vertical)

Appendix 2 – Project Planning

Below is a suggestion of a format for conducting Project Planning. Use an Excel spreadsheet or a Microsoft table with the headings shown here, then work systematically through the Project.

Core Project Team Members	Position	Project Roles
<i>Name of Project Members</i>	<i>Position</i>	<i>Duties Related to Project</i>

Objective	Activities	Person Responsible	Required Resources	Start Date	Completion Date	Evaluation
<i>Add Task Here</i>	<i>List the Activities Related to the Task Here</i>	<i>Name of the Person Performing the Task</i>	<i>List any Resources Required Here</i>	<i>Start Date Here</i>	<i>End Date Here</i>	<i>List of Outcomes for the Task</i>

Appendix 3 – Sample Research Request Form

Part A - Researcher Information

Name: _____

Address: _____

City: _____

Province: _____ Postal Code: _____

Country: _____

E-mail: _____

Telephone (Main): (_____) _____

Status:

- | | |
|---|--|
| <input type="checkbox"/> Student | Community affiliation (if any): _____ |
| <input type="checkbox"/> Independent Researcher | Institution affiliation (if applicable): _____ |
| <input type="checkbox"/> First Nations / Métis | Department and title (if applicable): _____ |
| <input type="checkbox"/> Community member | Instructor or Advisor (if applicable): _____ |
| <input type="checkbox"/> Other | |

For academic research requests, only:

1) Has the research project been approved by a University Ethics Committee?

Yes No Currently in review

2) List all Project Members (and their titles) who will be involved in the research project.

_____	_____
_____	_____
_____	_____

Contact Information of Head Researcher:

E-mail: _____

Telephone: (_____) _____

Part C - Agreement of Terms

If the research project is approved by the Institution, the Researcher agrees to abide by the following terms and conditions:

1. Where applicable, the Researcher recognizes the rights of the people being researched, as well as the right to not be studied, the right to privacy, to anonymity and to confidentiality.
2. The Researcher will retain rights to the product of research for all education, academic and scientific purposes as long as the traditional copyrights are not infringed. The product of research will not be sold or used for commercial reasons unless specified under Part C, note 9 of the agreement.
3. The Researcher will be responsible for maintaining the confidentiality of all personal information found in or taken from the records. Any and all project participants who will have access to this personal information must be disclosed in Part A under "Project Members."
4. The Researcher will not disclose any personal information found in or taken from the records without the expressed written permission of the Institute.
5. The Researcher will not use personal information found in or taken from the records to contact any person directly or indirectly, to participate in research without the written permission of the Institute.
6. The Researcher will not use information found in or taken from the records for any purpose other than those specified in Part B without the written permission of the Institute.
7. The Researcher must abide by all institute rules and regulations while researching in the institute.
8. Should the Researcher breach any part of this agreement, the Institute reserves the right to terminate the research project.
9. Additional Conditions (including commercial plans): _____

Access to the requested documents listed in Part B will expire on: _____

The Researcher will submit a copy of the research project to the Institute by: _____

Part D - Agreement of Terms and Conditions

Approved by the Institute: Yes No Conditionally

Approved by the Institute on: _____

Staff (Paid and Unpaid) supervising member: _____ Date: _____

Signature of Researcher: _____ Date: _____

