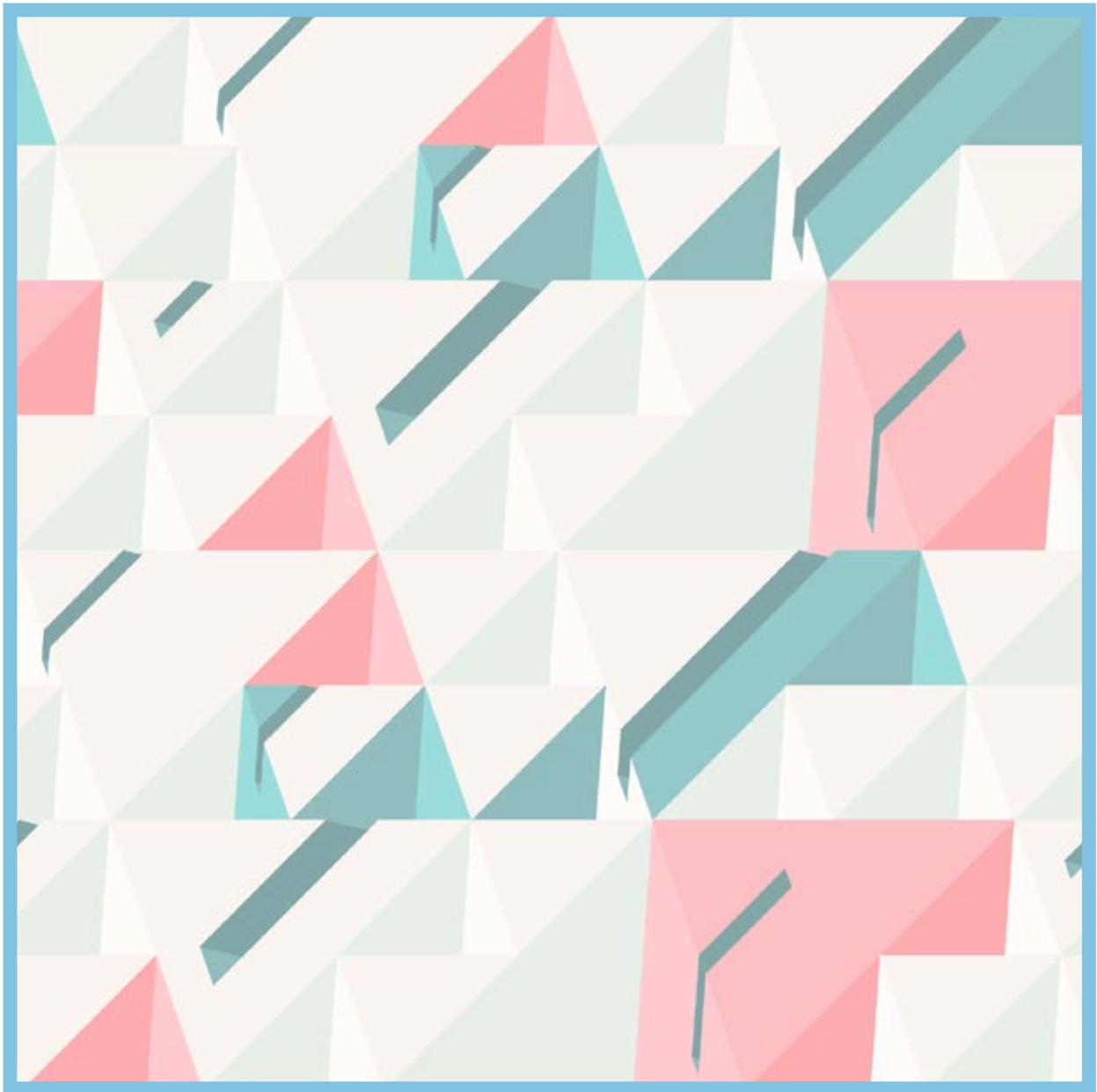


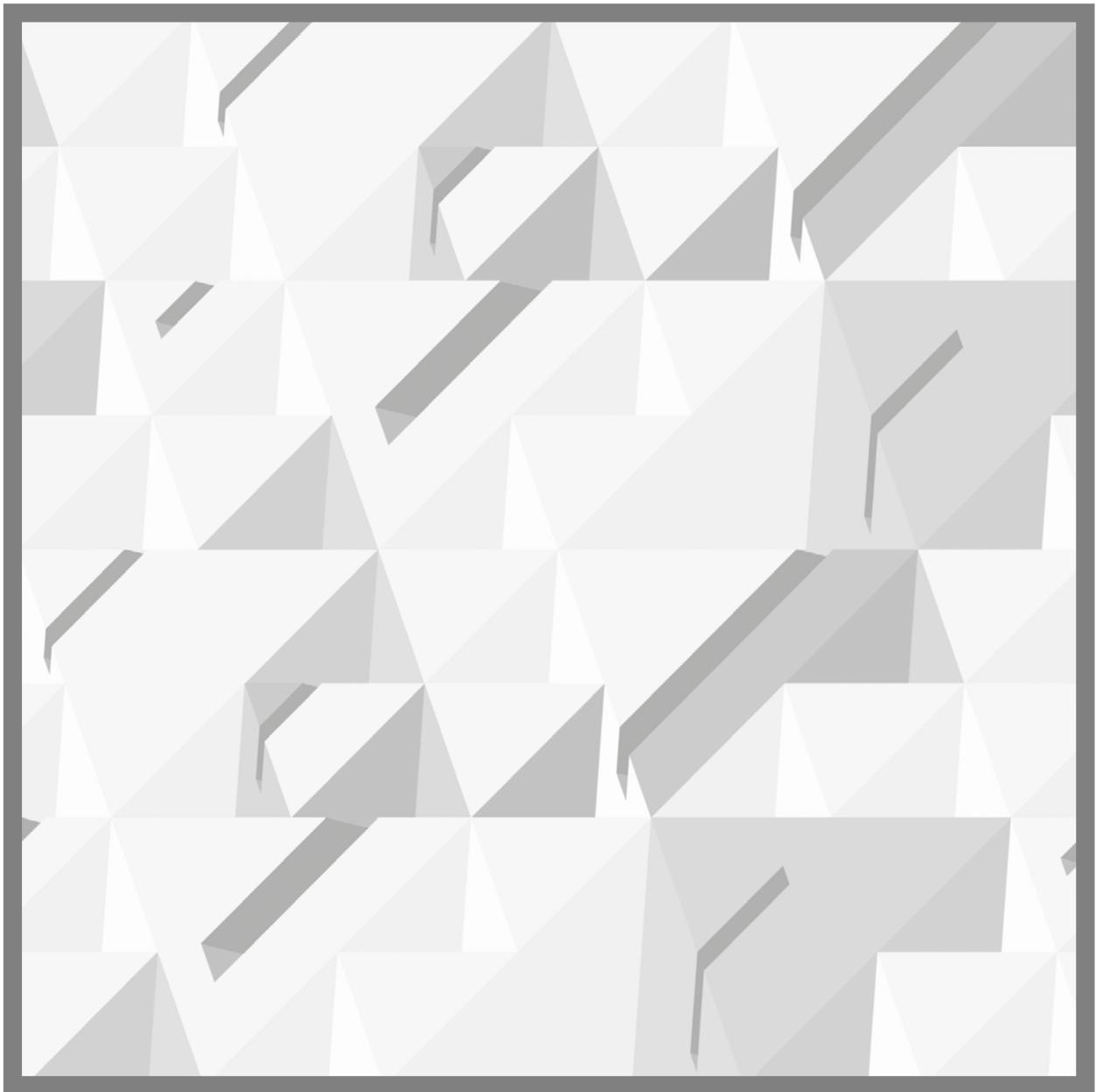
STANDARDS

for SASKATCHEWAN
MUSEUMS  2016



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MUSEUMS  2016



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TABLE OF CONTENTS

ACKNOWLEDGEMENTS	9
INTRODUCTION	11
Role and Definition of Museums in Society.....	13
ORGANIZATION	15
Format.....	15
MANAGEMENT	17
A. Governance Framework	23
General.....	23
B. Governing Authority	25
General.....	25
Board of Directors/Trustees.....	26
C. Advocacy	28
General.....	28
Community Relevance.....	29
D. Museum Management	30
General.....	30
Evaluation.....	31
E. Financial Management	32
General.....	32
Financial Resource Development.....	33
Museum Gift Shop.....	33
F. Human Resource Management	35
General.....	35
Paid Staff.....	36
Volunteer Staff.....	36
Professional Development.....	37
G. Risk Management	38
General.....	38
Health and Safety.....	39
Physical Plant and Premises.....	39
Security.....	41
Firearms.....	43
Emergency Preparedness.....	43
Liability.....	44

H. Information Management.....47
 Corporate Records.....47
 Privacy.....48

I. Intellectual Property.....49
 General.....49
 Patent.....50
 Copyright.....50
 Trademarks.....51
 Trade secrets.....52

COLLECTIONS.....**53**

A. Collections Management.....57
 General.....57
 Acquisition.....58
 Documentation.....60
 Cataloguing.....62
 Deaccessions.....63
 Repatriation.....64
 Loans.....65
 Identification, Authentication, and Appraisals.....66

B. Conservation.....68
 General.....68
 Artifact Handling and Transportation.....69
 Handling of Sacred or Sensitive Items.....70
 Environmental Monitoring and Control.....71
 Conservation Treatments.....73
 Exhibit Maintenance.....73

C. Storage.....76
 General.....76
 Planning and Organization.....77
 Pest Management.....79
 Security.....80

D. Research.....81
 General.....81
 Oral History and Fieldwork.....82

COMMUNICATIONS.....**85**

A. Public Programming.....89
 General.....89
 Exhibits - General.....91
 Exhibits - Planning and Development.....93
 Exhibits - Virtual.....95
 Exhibit - Evaluation.....96
 School Programs.....96
 Publications.....98

B. Marketing	100
Promotions.....	100
Public Relations.....	101
Membership Program.....	102
C. Community Engagement	104
General.....	104
D. Social Media	105
General.....	105
Museums and Anti-Spam Legislation.....	106
Appendix A: Glossary	107
Appendix B: First Nations/Métis Standards and Resources	113
Appendix C: References and Resources	119
Appendix D: MAS Resources	134
Appendix E: Additional Resources	135
Index	137

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The 2002 edition relied on the contributions of a number of people and their assistance is gratefully acknowledged. In 1999 Sarah Stacy interned with MAS and created the framework for the revised *Standards for Saskatchewan Museums*, and in 2000 Dianna Thompson was contracted to produce the first draft of the document. Many people reviewed draft versions of the revised standards document, offering important comments and suggestions regarding concepts, language, organization and format. Wendy Fitch completed the final work with the valuable assistance of the MAS Board of Directors, the First Peoples and Saskatchewan Museums Committee and the Special Interest Group Leaders.

In 2010 Sandra Massey was contracted to review the document and make recommendations for changes and additions. The community was again consulted and provided valuable feedback.

May-Lin Polk managed this 2016 edition of the *Standards* with research and revisions completed by Joan Kanigan, Chris Selman, and Paul Legris.

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INTRODUCTION

The Museums Association of Saskatchewan developed *Standards For Saskatchewan Museums* for the Saskatchewan museum community in all its diversity. *Standards* contribute to fulfilling the obligations of public trust by creating reference points for standard practice which museums can work towards at all levels of their operations.

The Museums Association of Saskatchewan undertook the initial development of *Standards* in 1987 in response to a directive from its membership. The original document was ratified in principle by the Museums Association of Saskatchewan's membership at its Annual General Meeting on May 6, 1988. In 1991 and again in 2002, revisions were made as a result of a review process in place at the time. The 2010 edition reflected the changing needs of the museum community within the context of the project's guiding principles. The development and review processes have been consultative, involving key managers and groups from the museum community along the way. This 2016 edition again reflects the changes in the museum community as well as changes within society in Saskatchewan.

Although *Standards for Saskatchewan Museums* has been written specifically for the Saskatchewan museum community, *Standards* does not differ substantially in content or priority from what is considered to be good museum practice in Canada and elsewhere in the world. Readers of *Standards* can use it as a reference document when unsure what to do or as a supplementary document to their professional development classes through the Association.

The Museums Association of Saskatchewan created *Standards* to be a model of achievable excellence covering all aspects of museum operations. It is relevant to the diverse institutions in the provincial museum community. Additionally, MAS describes *Standards* as a consistent set of operational goals and a comprehensive set of operational guidelines.

The 2016 revision of *Standards for Saskatchewan Museums* was guided by the following principles:

- ◆ *Standards* represents sound and accepted museum practice and ethics.
Standards provides goals for operational excellence in the 'core' areas of Management, Collections, and Communications.
- ◆ *Standards* recognizes that the museum is a living, growing organization.
Standards provides a path for improving or developing organizational performance along which the museum may logically progress at its own rate. A museum might not be able to meet all the best practices set out in *Standards* at once, but can move along at its own pace to achieve them in order to become long-lasting, community supported institutions.

- ◆ *Standards* recognizes the museum's need for self-determination.
Each museum determines its own priorities; what is important now versus what should be implemented in the future.
- ◆ *Standards* relies on voluntary implementation.
Standards are not rules or regulations but rather established best practices within the museum field that assist museums in becoming long-lasting institutions upholding the responsibilities given to it as a public institution with public trust responsibilities.
- ◆ *Standards* are not resource dependant.
Goals in *Standards* can be achieved in various ways.
- ◆ *Standards* represents reasonable expectations within the museum field and the Saskatchewan museum community.
Standards was created with all levels of resources and abilities in mind and are not isolated from the realities of museum work.
- ◆ *Standards* are helpful, useful, and practical guidelines.
The guidelines in *Standards* are not meant to complicate museum operations, but rather provide ways in which museums can avoid the difficulties of running a museum no matter what the situation. *Standards* also helps museums to identify legal issues that they might encounter.
- ◆ *Standards* assists the museum to undertake self-evaluation.
Each section of *Standards* allows the users to determine where they are at and determine what areas they should look towards next. *Standards* helps museums to identify areas that the museum had not addressed or thought about.
- ◆ *Standards* recognizes the diversity of the museum community.
The guidelines in *Standards* are applicable to all types of museums; large or small, specialized topics or not, and with paid staff or volunteer run. The guidelines are not geared towards a particular type of museum with a certain amount of resources; it is aimed towards all types.

In articulating a comprehensive set of operational *Standards* based on these principles the presumption is not that all Standards are relevant to every institution. Rather, the assumption is that museums will find relevant, useful, practical information within this document that will help them to fulfil their role in society.

Role and Definition of Museums in Society

A *museum* is a non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates, and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of study, education, and enjoyment.

Museums, thus defined shall include, but not be exclusive to, archives, art galleries, artist-run centres, aquaria, botanical gardens, community museums, cultural centres, historical societies, historic buildings, sites and parks, keeping houses, natural history and science museums, planetaria and zoos, preservation projects, and sites which meet the requirements of the preceding sentence.

A volunteer board of directors or trustees may govern museums or they may be part of an existing publicly accountable organization such as a municipal, provincial, or federal government or agency; educational or religious organization; or First Nation or Tribal Council.

Saskatchewan museums make a significant contribution to the development of their communities in two ways. First, as stewards of our legacy, both our past and the legacy we leave for future generations, and secondly, through their public service role. As a provider of a public service, there are certain expectations of a museum. These expectations are as follows:

1. *Museums and Public Trust*

Museums are considered to be one of the most trusted institutions. By the nature of their creation and mission, museums are expected to be stewards of the public inheritance safeguarding natural, cultural, and scientific heritage¹. The public believes that the museum will manage these resources to the best of its ability with the best interest of the public in mind.

2. *Museums and Public Service*

Museums today operate in an increasingly regulated world where the need to be accountable is essential. Museums are accountable not only in a financial sense but also with regards to the programs and services they offer. At all levels of museum operations, museums must use their resources in a responsible way and be responsive to the needs and wants of the communities they serve. Therefore, the programs and services offered must be relevant, addressing contemporary issues and concerns of communities and society.

¹ International Council of Museums (ICOM). (2015). *Code of Ethics*. Retrieved on December 4, 2015 from <http://icom.museum/the-vision/code-of-ethics/>

3. *Museums and Access*

In order to be responsible, responsive, and relevant, museums must ensure public access to their collections, programs, and services. Access can be physical or intellectual or both. Advances in technology present both challenges and opportunities enabling museums to reach a variety of audiences at home and around the world.

4. *Museums and Meaning*

It is crucial that the museum operates in a fair and unbiased manner in an effort to create meaning, generate new knowledge, and shared understandings. Historically considered elite organizations, museums today are places of learning where meaning is negotiated through dialogue and where respect and tolerance for others is nurtured. This is the museums contribution to society and its development.

5. *Museums and Public Good*

Museums also make a significant contribution to their community's sense of identity, nurturing a sense of place and belonging that in turn enables individuals to contribute to society at large. How we view the past informs our choices for the future. A shared understanding of the past enables communities to build a shared future and defines the legacy we leave for future generations.

ORGANIZATION

Format

Standards are written and organized according to the structure and operation of a museum regardless of type or academic discipline (such as history, art, natural history, palaeontology, etc.).

This document is divided into three main areas:

1. Management
2. Collections
3. Communications.

There is significant overlap between the three main areas as they are all interrelated; some guidelines are repeated in more than one place.

Within each of these areas, specific activities or subjects are given separate headings. Standards given under each heading are considered equal in importance and are not listed in any particular order.

This document is designed to be user-friendly. Each statement in *Standards* is written as a full sentence. Some statements have “Tips”; tips provide additional information to clarify or further explain the standard.

At the end of this document there is also a Glossary, Bibliography, and Index with listings arranged alphabetically.

How to use *Standards*

As stated above, *Standards* is divided into 3 sections. When looking for advice or assistance with a particular area of museum practice, it is best to first determine where the issue lies. Is it a question about how the museum board should operate? Look in Management. Do you need assistance with collections management practices? Look in Collections. Are you pondering different ways in which to get your message across to your community? Look in Communications. Scanning the Table of Contents is always a good option as well as it outlines what each section addresses. Furthermore, each section has an introductory paragraph that describes what is contained in each area.

If you cannot find what you are looking for in *Standards*, call the Museums Association of Saskatchewan office.

*Note that the numbering system of this 2016 version of Standards has changed and simplified.

MANAGEMENT

In this section:

Governance Framework

Governing Authority

Advocacy

General Museum Management

Financial Management

Human Resource Management

Risk Management

Information Management

Intellectual Property

Management

Management is broken-down into 11 sections. To determine which section is applicable to you, please read the description of each section.

A. Governance Framework

Museums operate within a governance framework that sets the overall purpose and direction for the museum. This framework comprises the institution's constitution and bylaws, its written statement of purpose or mission, mandate, objectives, and the plans, policies, and procedures that guide day-to-day operations. In addition, museums operate with statutes (Laws of the Land) that direct how they are formed and the activities they can undertake as not for profit institutions along with ethical guidelines and standards adopted provincially, nationally, and internationally.

By operating within a sound legal and management framework that follows recognized museum ethics and protocols, museums demonstrate their credibility and the value they provide to their communities.

B. Governing Authority

The responsibility for ensuring the museum achieves its public trust responsibilities rests with the governing authority. The governing authority is the highest level of decision-making and legal authority in a museum. By law, the governing authority is ultimately accountable for, and has authority over, the museum's resources and activities. The governing authority articulates and communicates the museum's vision and through policy, defines the parameters within which the museum carries out its work. The governing authority is responsible for determining how management and administrative functions are delegated within the museum. The museum's personnel, either paid or volunteer, are responsible for the day-to-day operations.

The governing authority of a museum is accountable to the public and responsible for the financial stability of the museum. The ultimate responsibility for all policy decisions relating to the museum, its collections and service to the public rests with the governing authority.

C. Advocacy

Advocacy is defined as a collaborative process wherein a group of people and/or a group of museums come together to identify, define, plan, and implement a plan in order to bring about a specific change in funding, community awareness, or government policy. Advocacy is "the act of speaking or disseminating information intended to influence individual behaviour or opinion... or public policy and law."²

² Government of Canada, Voluntary Sector initiative, and Privy Council Office. (1999). *Working Together: A Government of Canada/Voluntary Sector Joint Initiative – Report of the Joint Tables*. Ottawa, Ontario: Privy Council Office, Government of Canada, p. 50. Retrieved from www.vsi-isbc.org/eng/knowledge/working_together/index.cfm

D. General Museum Management

A key role of management is assisting the museum, regardless of its size or complexity, in achieving consistent results so the museum's mission can be articulated and fulfilled. Management is about planning, organizing, staffing, and directing a group of one or more people to accomplish a goal. Sustaining such a team requires leadership, vision, and a commitment to the value of team effort. The most powerful function of an effective manager is that of inspiring others to be part of the team. The transfer of power from one (or a few) to many involves the delegation of tasks and the sharing of responsibility.

Effective museum management is a responsibility that embraces all the resources and activities of the museum, and involves all the staff and volunteers. It is a necessary element in the development and advancement of a museum.

Without proper management, a museum cannot provide the appropriate care and use for collections, nor can it maintain and support an effective exhibition and education program. Public interest and trust can be lost without qualified management, and the recognition and value of the museum, as an institution in the service of society, can be jeopardized.

Management focuses on getting work done and delivering results. Where there is a Museum Manager, it is their responsibility to interpret and implement board policy; oversee day-to-day operations; and allocate resources (human and financial).

E. Financial Management

The governing authority is accountable for the finances of the museum and for ensuring the museum can meet its current and future financial obligations through sound fiscal management. With increased demands for accountability from funders and the growing complexity of museum operations, more rigorous systems of financial planning and forecasting are being used in museums.

In addition, museums must become more adept at generating revenue from diverse sources to ensure the museum is not overly reliant on one source of funding. This means that the governing authority must understand not only how the museum generates revenues, but the impact revenue generating activities have on the museum's purpose. Being able to manage financial resources effectively is important for the long-term sustainability of any organization. "Financial management includes a range of tactics including: understanding financial statements, financial reporting, reporting authors and audiences, budget preparation, fundraising, and asset management."³

³ Hall, D. & R. Duckles. (2005). *BCMA Best Practices Module: Financial Management*. Victoria, B.C.: British Columbia Museums Association. Retrieved from <http://www.museumsassn.bc.ca/wp-content/uploads/2013/07/BP-4-Financial-Management.pdf>

F. Human Resource Management

Human resource management focuses on the relationship between how the museum carries out its activities and the needs of the people responsible for those activities. Human resource development strategies support a museum in its efforts to improve and build capacity of both the institution and the individuals involved. Within the museum, human resource management is the responsibility of both the governing authority and the management or administrative level of the institution.

G. Risk Management

Managing and minimizing risk is part of the safe and successful operation of the museum. It includes attention to those matters that threaten the well-being, safety, and security of museum visitors, the board and staff, the museum building, its premises, and the collections. Risk management is a preventative measure that consists of taking simple, basic actions to ensure the security and safety of the operation.

H. Information Management

Museums collect and generate a large amount and variety of information in their day-to-day operations. It is essential that the information be collected, stored, and shared in an ethical and legal manner. Therefore, the museum must ensure that information management systems are in place to facilitate not only the collection and safe storage of information, but also the efficient retrieval of information. Moreover, policies must be in place to ensure information is shared in a fair and unbiased way. This includes how technology can be used to manage information.

I. Intellectual Property

Intellectual Property refers to creations of the mind, such as inventions; literary and artistic works; designs; and symbols, names and images used in commerce.

A. Governance Framework

Museums operate within a governance framework that sets the overall purpose and direction for the museum. This framework comprises the institution's constitution and bylaws, its written statement of purpose or mission, mandate, objectives, and the plans, policies, and procedures that guide day-to-day operations. In addition, museums operate within statutes (Laws of the Land) which direct how they are formed and the activities they can undertake as not for profit institutions along with ethical guidelines and standards adopted provincially, nationally, and internationally.

By operating within a sound legal and management framework that follows recognized museum ethics and protocols, museums demonstrate their credibility and the value they provide to their communities.

General

1. The governing documents establish the museum as an organization that operates in the service of society and its development.

TIP The museum's governing documents provide evidence of its legal existence and outlines how the museum will operate. Usually this takes the form of written articles of incorporation and bylaws.⁴

2. The museum has a governing or managing body that is responsible for, and legally authorized to act on behalf of, the museum.

3. The museum has adopted a code of ethics that sets out accepted practices and rules of conduct.

TIP All museum operations and dealings with the public and staff need to be conducted within an acceptable code of ethics such as the ones developed by the Canadian Museum's Association (CMA) or the International Council of Museums (ICOM).

TIP Many professional groups such as conservators, archivists, and registrars also have established professional codes that guide their activities.

⁴ Saskatchewan Information Services Corporation. (nd). *Articles of Incorporation and Bylaws*. Retrieved from www.isc.ca/CorporateRegistry/FormingaNonProfitCorporation/Pages/ArticlesofIncorporationandBylaws.aspx

4. The museum operates in compliance with municipal, provincial, federal, and international laws and conventions.

TIP The Governing Authority is responsible for ensuring the museum is in compliance with all laws and conventions and should ensure that it receives regular reports from management demonstrating compliance.

5. The museum has a written statement of purpose. For institutions with central management and branch facilities, each branch must have a clearly defined written statement of purpose.

TIP The statement of purpose is sometimes referred to as the mission statement.

TIP The statement of purpose communicates the way in which the museum will serve society and its development. This fundamental policy document succinctly states the purpose and role of the museum, from which flows all the museum's goals / objectives and policies. It defines the museum's relationship to its community.

6. The museum has a written long-term or strategic plan that is monitored and updated on a regular basis.

7. The museum's governing documents include a written dissolution policy that includes disposal of the collection according to ethical standards

TIP If the museum is a registered charity the dissolution policy must ensure that any remaining assets (including the collection) are to be given to a qualified donee. This is a Canada Revenue Agency (CRA) requirement.

B. Governing Authority

The responsibility for ensuring the museum achieves its public trust responsibilities rests with the Governing Authority. The Governing Authority is the highest level of decision-making and legal authority in a museum. By law, the Governing Authority is ultimately accountable for, and has authority over, the museum's resources and activities. The Governing Authority articulates and communicates the museum's vision and through policy, defines the parameters within which the museum carries out its work. The Governing Authority is responsible for determining how management and administrative functions are delegated within the museum. The museum's personnel, either paid or volunteer, are responsible for the day-to-day operations.

The Governing Authority of a museum is accountable to the public and responsible for the financial stability of the museum. The ultimate responsibility for all policy decisions relating to the museum, its collections and service to the public rests with the Governing Authority.

General

1. The Governing Authority understands and accepts their public trust obligations with regards to both stewardship and public service.

TIP Public service requires the museum to be accessible, both physically and intellectually, creating meaningful learning experiences that benefit the public and contribute to community development.

TIP Stewardship requires the museum to care for its collections such that they are passed on to future generations in good condition.

2. The individual members of the Governing Authority understand and accept their legal responsibilities: duty of care, duty of loyalty, and duty of diligence.

TIP The duty of care requires board members to exercise their power with competence according to their skills and knowledge. This means that individual directors can be held to different levels of accountability depending on their skills, knowledge, and experience. For example, with respect to financial matters a board member who is an Accountant will be held to a higher duty of care than a board member who is not.

The duty of loyalty requires that a board member act honestly and in good faith, putting the interests of the museum ahead of all other interests. Board members must also avoid real and perceived conflict of interest. A conflict of interest is any situation where a board member or a close family member / friend, could potentially benefit from a decision being made by the board.

The duty of diligence requires a director to attend meetings and to be as fully informed about the museum as possible.

TIP See MAS' Governance – *Museum Board Basics Tip Sheet* for more information concerning this topic.

3. The Governing Authority is accountable to the public for the museum's operations and activities and annually reports to the public on how the museum's resources were used.
4. When an institution relies on its Governing Authority to undertake museum operations, they understand the difference between their roles and responsibilities as board members and their roles and responsibilities as museum workers/volunteers.

TIP For example, if a board member volunteers to help museum staff catalogue artifacts, the board member is acting as a volunteer. The Board member reports to, and takes direction from, the person responsible for the collection.

5. The Governing Authority speaks with one voice on behalf of the organization as a whole.

TIP Discussion, disagreement, and constructive debate are an important part of the decision making process however, once the Governing Authority has made a decision each director, as part of their duty of loyalty, must publicly support that decision.

6. The Governing Authority monitors and evaluates the museum's performance on a regular basis in order to assess if the museum is fulfilling its mandate.
7. The Governing Authority is responsible for ensuring that the museum has sufficient resources to fulfil its mandate.
8. The Governing Authority has written policies for addressing conflict of interest, code of conduct, and confidentiality.
9. The Governing Authority periodically evaluates its collective and individual members' performance in achieving its goals and improves its methods where needed.

Board of Directors/Trustees

10. Where the Governing Authority is a board of directors/trustees its governing style and decision-making processes are defined.

TIP There are many models and names for different governing styles including, Carver Board Governance, Policy Governance, Management Board, and Working Board. Despite all the names, governance styles basically fall into two categories:

Policy boards and Administrative boards. The difference between the two is how management and administration responsibilities within a museum are delegated.

11. Where the Governing Authority is a board of directors/trustees it conducts its business through a regular schedule of meetings.
12. The Governing Authority orients new members by clearly outlining their roles and responsibilities and the Board's governing style.
13. Where the Governing Authority is a board or directors/trustees it has in place a formal process for nominating new board members whose skills, knowledge, and experience are beneficial to the museum and who reflect the diversity of the community they serve.

TIP To ensure a broad range of skills and expertise for decision making and execution of the public trust, the board recruits community members such as lawyers, accountants, teachers, and entrepreneurs who have practical skills and contacts within the community as well as those that bring a diversity of perspectives to board discussions.

14. Where the Governing Authority is a board of directors/trustees it specifies staggered terms for its members

TIP This ensures continuity of experience on the Board. It is also beneficial to limit the number of terms an individual can serve on the Board.

15. Where the Governing Authority is a board of directors/trustees it has written descriptions of roles and responsibilities for each board committee and board position.

C. Advocacy

Advocacy is defined as a collaborative process wherein a group of people and/or a group of museums come together to identify, define, plan, and implement a plan in order to bring about a specific change in funding, community awareness, or government policy. Advocacy is “the act of speaking or disseminating information intended to influence individual behaviour or opinion... or public policy and law.”⁵

“Advocacy is a process that is intended to educate and inform governments, funders, and businesses in order to persuade them to change something.”⁶

General

1. The museum has an advocacy policy that acknowledges and demonstrates its commitment to participating in public dialogue.

TIP Museums that are registered charities through the Canada Revenue Agency (CRA) must adhere to CRA’s advocacy rules and guidelines. This includes being nonpartisan and spending only 10% of the museum’s budget on advocacy activities. It is important for the museum and those involved in advocacy activities to understand the difference between activities that advocate on behalf of the museum’s mission and those that would be considered political activities by CRA.

2. The museum takes specific steps to ensure that diverse groups within the community are consulted in the development of the museum’s advocacy plan.

TIP The most effective way to influence public opinion is to engage the community in a dialogue about the issues or concerns of the organization and to work with them in a collaborative way to address the community’s interests.

3. The museum board and staff develop an ongoing relationship with policymakers and actively seek opportunities to discuss the museum’s position with them.
4. The museum pursues opportunities to raise emerging issues to the attention of municipal, provincial, federal and Aboriginal governments, funders, businesses, and the public.

TIP More information on Advocacy is available through MAS’ *Advocacy Guide: Tools and Tips*.

⁵ Government of Canada, Voluntary Sector Initiative, and Privy Council Office. (1999). *Working Together: A Government of Canada/Voluntary Sector Joint Initiative – Report of the Joint Tables*. Ottawa, ON: Privy Council Office, Government of Canada, p. 50. Retrieved from www.vsi-isbc.org/eng/knowledge/working_together/index.cfm

⁶ DeSantis, G. (2010). *Advocacy Guide: Tools and Tips*. Regina, Saskatchewan: Museums Association of Saskatchewan. p. 11

Community Relevance

Museums play an important role in their communities because of the privileged place they hold as keepers of a community's history, culture, and collective knowledge. Maintaining this role requires museums to be far more integrated and open to their community's needs, issues, and aspirations. "Relevance [for museums] is about the community's current agenda – not about the museum's agenda".⁷ It is therefore important for museums to continually engage community members in an open dialogue about their needs and how the museum can serve those needs.

5. The museum has a written plan for how it will engage its community.
6. Members of the museum Governing Authority, staff, and volunteers reflect the diversity of the community in which the museum exists.
7. The museum nurtures ongoing relationships with other community groups, private and public organizations, and individuals to obtain input in the planning, implementation, and evaluation of museum operations.

TIP Social media tools are an effective way for museums to engage in ongoing dialogue with community members. When used effectively, social media can be used to build strong communities around specific topics or the museum in general.

8. Where there are First Nations and/or Métis collections, First Nations and/or Métis people are actively involved in the management and governance of the museum. Written strategies are in place for actively involving First Nations and Métis people in the museum.

TIP This is particularly important when the collection or displays contain artifacts reflecting First Nations or Métis history.

9. The museum recognizes its responsibility to contribute to community development and is committed to providing equal access for all to the programs and services offered.
10. The museum carries out its activities as part of a broader community and contributes to community events.

TIP *Building Responsive Museums: A Discussion Framework* is a self-assessment tool that can help a museum develop a better understanding of what community involvement means and how to better engage communities.

⁷ Museum Life with Carol Bossert. (November 14, 2014). *Museums in a Time of Change: Guest Robert Janes*. Retrieved from www.voiceamerica.com/episode/81428/museums-in-a-time-of-change

D. Museum Management

A key role of management is assisting the museum, regardless of its size or complexity, in achieving consistent results so the museum's mission can be articulated and fulfilled.

Management is about planning, organizing, staffing, and directing a group of one or more people to accomplish a goal. Sustaining such a team requires leadership, vision, and a commitment to the value of team effort. The most powerful function of an effective manager is that of inspiring others to be part of the team. The transfer of power from one (or a few) to many involves the delegation of tasks and the sharing of responsibility.

Effective museum management is a responsibility that embraces all the resources and activities of the museum, and involves all the staff and volunteers. It is a necessary element in the development and advancement of a museum.

Without proper management, a museum cannot provide the appropriate care and use for collections, nor can it maintain and support an effective exhibition and education program. Public interest and trust can be lost without qualified management, and the recognition and value of the museum, as an institution in the service of society, can be jeopardised.

Management focuses on getting work done and delivering results. Where there is a Museum Manager, it is their responsibility to interpret and implement board policy; oversee day-to-day operations; and allocate resources (human and financial).

General

1. The museum works to formal, written policies and procedures that cover its management, responsibilities, programs, services, and reflect its Statement of Purpose.
2. The museum has a general knowledge of the laws and regulations that apply to the museum as well as the various industry and professional standards that guide their work. The museum seeks advice from professional consultants when needed.
3. When entering into collaborative relationships museum management ensures that authority is shared and all partners participate equally in the planning, development, and execution of the activity.

TIP Collaboration is a mutually beneficial and well-defined relationship entered into by two or more organizations to achieve common goals. Possible partners may include other heritage institutions, cultural groups, community clubs, other non-profit organizations, businesses, etc.

4. Mechanisms and avenues exist which ensure regular, ongoing, communication within the museum.

TIP Of all the factors that contribute to sustained success in museums, one of the more important is creating a cohesive and effective team. Communication is an important element in creating an effective team and enabling the museum to get people together to accomplish desired goals and objectives using available resources efficiently and effectively.

5. The museum has a plan for communicating its accomplishments to the broad community.

Evaluation

6. The museum implements a regular and systematic evaluation of its operations including all management systems, board and staff performance as well as public programs and services by implementing, where applicable, front-end, formative, and/or summative evaluation methods.

TIP The value of museums is increasingly based on the concept of Public Value and the organization's relevance to individuals and communities. In their quest for public support, museums must demonstrate their value not only to governments and sponsors but also to the general public.

7. The museum uses systematic evaluation processes gathering both qualitative and quantitative information.
8. The museum collects, analyses, and uses the community input they generate to enhance the quality of its operations, programs and services as it strives for excellence in the organization.

TIP Information includes attendance figures, age, gender, and other demographic information. This can be collected with such tools as face-to-face, mail, or telephone interviews. Opinions may be collected through comment books, sticky note walls in exhibition spaces, and evaluation sheets after program activities. Social media and on-line survey tools can also be used to gather feedback. The analysis of attendance and attitudes contribute to audience development and are indicators of how well the museum is serving its community.

9. The information obtained from the program evaluation is used in the development of programs and services that are targeted to the needs of specific audiences.

E. Financial Management

The Governing Authority is accountable for the finances of the museum and for ensuring the museum can meet its current and future financial obligations through sound fiscal management. With increased demands for accountability from funders and the growing complexity of museum operations, more rigorous systems of financial planning and forecasting are being used in museums.

In addition, museums must become more adept at generating revenue from diverse sources to ensure the museum is not overly reliant on one source of funding. This means that the Governing Authority must understand not only how the museum generates revenues, but the impact revenue generating activities have on the museum's purpose. Being able to manage financial resources effectively is important for the long-term sustainability of any organization. "Financial management includes a range of tactics including: understanding financial statements, financial reporting, reporting authors and audiences, budget preparation, fundraising, and asset management."⁸

General

1. The museum has written policies and procedures for all financial activities of the organization.
2. The Governing Authority approves the annual budget and reviews regular financial reports of the operating budget and capital funds.
3. The museum uses sound financial management and reporting practices and procedures.
4. In organizations without paid staff, the Governing Authority assigns oversight of the finances of the organization to a financial committee and/or treasurer that are responsible for reporting regularly to the governing authority.
5. In organizations with paid staff, the senior staff person is assigned responsibility for monitoring finances and reporting regularly to the Governing Authority.
6. The museum ensures that an annual audit or review of its financial statements is conducted and reports to the membership on the state of the organization's financial position.

TIP

The audit and review requirements for museums are as follows:

- a. An audit is required when revenues exceed \$250,000 in the previous fiscal year.

⁸ Hall, D. & R. Duckles. (2005). *BCMA Best Practices Module: Financial Management*. Victoria, B.C.: British Columbia Museums Association. Retrieved from <http://www.museumsassn.bc.ca/wp-content/uploads/2013/07/BP-4-Financial-Management.pdf>

- b. The requirement for an audit may be waived in favour of a “review” when revenues are between \$25,000 and \$250,000 in the previous fiscal year.
- c. The requirement for either an audit or a review may be waived when revenues are less than \$25,000 in the previous fiscal year. The waiver of an audit, or a review, or both, as the case may be, must be passed by 80% of the members voting on the resolution.⁹

TIP Charitable corporations have, and other corporations may have, an audit committee.

TIP An audit committee reviews the organization’s annual financial statements and recommends to the Board of Directors whether such financial statements should be approved. The committee serves as a channel whereby the external auditors can draw matters to the attention of the board.

Financial Resource Development

7. The museum has a financial resource development plan in place to ensure it has enough money to fulfil its mandate.
8. The museum is familiar with and maintains industry standards established for the non-profit sector as they relate to fundraising.
9. The museum has a written policy to govern fundraising, donor and sponsor recognition, and donor rights.

TIP The Association of Fundraising Professionals (AFP) has developed a Donor Bill of Rights and a Code of Ethical Principles and Standards for Fundraising. Imagine Canada, in partnership with AFP, has also developed the Ethical Fundraising and Financial Accountability Code.

10. The museum secures revenue from a variety of sources in keeping with its purpose.

Museum Gift Shop

11. The museum has a written policy to govern gift shop sales / activities.
12. All sales activities are based on sound, established marketing and business practice.

⁹ Information Services Corporation. (nd). *The Non Profit Corporations Act: General Administrative Requirements*. Retrieved from <https://www.isc.ca/ISCFORMS/Documents/Corporate%20Registry/Non%20Profit%20Corporations%20Act%20forms/NP%20Act%20General%20Requirements.pdf>

13. Proper budget and accounting procedures are followed and regular audits are conducted.
14. One or more individuals are assigned responsibility to oversee the management of the museum gift shop.
15. Adequate training is provided to individuals involved in the operation of the gift shop.
16. Products sold in the gift shop are related to the museum's mandate, collection, exhibits, or programs.
17. No sales activity is undertaken that could jeopardize the museum's financial wellbeing or its public image and credibility.
18. Deaccessioned artifacts are never sold in the museum's gift shop.
19. The museum ensures that products sold in the gift shop do not misrepresent cultural groups, perpetuate stereotypes, or present misleading or incorrect information on any subject.
20. Sales activities carried out on the museum's premises or on the museum's behalf by a third party do not jeopardize the museum's public image.
21. Replicas or reproductions sold are clearly marked as such.
22. Products sold in the museum's gift shop that are copyright material must be visibly marked with the copyright symbol. © - c within a circle.

F. Human Resource Management

Human resource management focuses on the relationship between how the museum carries out its activities and the needs of the people responsible for those activities. Human resource development strategies support a museum in its efforts to improve and build capacity of both the institution and the individuals involved. Within the museum, human resource management is the responsibility of both the governing authority and the management or administrative level of the institution.

General

1. The museum maintains industry standards established for the non-profit sector as they relate to human resource management.

TIP The HR Council for the Voluntary & Non-profit Sector (HR Council) has established HR Management Standards¹⁰ and WorkinCulture has created a number of resources including an Overview of HR Management¹¹. Both are available online.

2. The Governing Authority is responsible for appointing the senior staff person for the museum and for evaluating their performance.
3. Members of the museum Governing Authority, staff, and volunteers reflect the diversity of the community in which the museum exists.
4. The museum recruits and retains well-trained paid and volunteer staff.
5. There is at least one person, paid or volunteer, working in the museum with professional museological training.
6. Paid and volunteer staff have job descriptions that accurately describe the duties, tasks, and performance expectations of the position and the degree of accountability and responsibility.
7. The museum ensures effective communications between and among both paid and volunteer staff by providing regularly scheduled opportunities for the exchange of information.
8. The museum has a human resource plan to address current and future staffing needs.

¹⁰ Community Foundations of Canada. (nd). *HR Management Standards*. Retrieved from <http://www.hrcouncil.ca/resource-centre/hr-standards/home-cfm>

¹¹ Cultural Careers Council Ontario. (nd). *Human Resources Management: An Overview*. Retrieved from www.workinculture.ca/getmedia/c5b4c9eb-a5d9-4a43-9aa9-127a09a15e7b/toolsOverview.pdf.aspx

TIP *The Human Resource Planning Tool* (developed by The Learning Coalition) is a useful resource to help museums identify current and future HR needs.¹²

9. The museum has identified critical positions and succession plans are in place to ensure ongoing operations.

Paid Staff

10. The museum's senior staff person is responsible for the day-to-day management of the museum, including the implementation and monitoring of museum policies as they relate to operations.
11. When contracting out for services or hiring Project Consultants, the museum develops a contract that clearly defines the scope of the work, timelines, payment schedules, as well as overall costs / budget for the work and has a system in place to monitor and evaluate the work.

TIP The museum does not employ people as self-employed contractors for the purposes of avoiding the obligations it would have to an employee (for example, benefit coverage, CPP and EI contributions, and income tax deductions).

TIP Refer to the Canada Revenue Agency guidelines to determine whether an individual is an employee or self-employed.

Volunteer Staff

12. The board of directors and senior management acknowledge and support the vital role of volunteers in achieving the museum's purpose or mission. Volunteers are welcomed and treated as valuable and integral members of the organization's human resources.

13. The museum has a volunteer program to encourage community involvement.

TIP The Canadian Code for Volunteer Involvement provides a framework for involving volunteers in all levels of an organization.

14. Policies and procedures are adopted by the organization to provide a framework that defines and supports the involvement of volunteers.

15. A qualified person is designated to be responsible for the volunteer program.

¹² The Learning Coalition. (2006). *The Human Resource Planning Tool*. Retrieved August 6, 2015 from www.workinculture.ca/getmedia/7fda184d-4cb0-4e73-91f7-fc2b907f4fad/ToolsHRplanning.pdf.aspx

16. A clearly communicated screening process is consistently applied.
17. Volunteer assignments address the purpose of the organization and involve volunteers in meaningful ways – reflecting their various abilities, needs, and backgrounds.
18. Volunteer recruitment and selection reaches out to diverse sources of volunteers.
19. Volunteers receive an orientation to the organization, its policies and procedures, and receive training for the volunteer assignment.
20. Volunteers receive appropriate levels of supervision according to their task and are given regular opportunities to receive and give feedback.
21. The contributions of volunteers are regularly acknowledged with formal and informal recognition methods.

Professional Development

22. The museum encourages and supports lifelong learning by providing opportunities for the continual growth and development of both paid and volunteer staff.
23. All museum personnel have access to professional advice and resources.
24. Where applicable, the museum provides sufficient training for volunteers, staff, and board members related to their First Nations and Métis collections, protocols, and history.

TIP MAS provides opportunities for training through a variety of programs such as the Certificate in Museum Studies. Contact the MAS for information on professional development opportunities.

25. The museum supports training and development opportunities that meet the needs of both the individual and the institution by allocating funds on an annual basis.
26. The museum has a process that supports staff in transferring what they have learned to their work.

G. Risk Management

Managing and minimizing risk is part of the safe and successful operation of the museum. It includes attention to those matters that threaten the well-being, safety, and security of museum visitors, the board and staff, the museum building, its premises, and the collections. Risk management is a preventative measure that consists of taking simple, basic actions to ensure the security and safety of the operation.

General

1. The museum has a Risk Management Plan in place that identifies and assesses risks and outlines the strategies in place to manage them. The Risk Management Plan is reviewed on a regularly scheduled basis.

TIP Risk Management is a systematic approach to minimizing the possibility that some future event will cause harm. The museum's goal is to balance the risks and the benefits they produce.

TIP A Risk Management Plan is a document that identifies risks and the strategies put in place to control them. It includes policies, procedures, systems, etc., when they will be implemented and by whom as well as, the necessary budget, training, and communications required to implement and evaluate the plan.

2. The museum is familiar with industry standards as well as how other museums and non-profit organizations are operating and maintain similar standards of care.

TIP The Standard of Care required is determined by legal precedents. For articles and case studies in this area please see: Carters Professional Corporation - Barristers, Solicitors & Trade-Mark Agents, the Pro Bono Law Saskatchewan Inc., and the Public Legal Education Association of Saskatchewan (PLEA).

3. The museum maintains a written record of their risk management activities that demonstrates due diligence and ensures these records are stored in a secure location.

TIP Due diligence is determined in court by the foreseeability of the risk and the controls put in place to minimize the risk. Negligence is the failure to exercise the degree of care that a prudent or reasonable person would usually use under the same or similar circumstances. Risk management is an important board responsibility as it is the board that is ultimately responsible for the museum. Senior management also plays an important role in identifying and managing risk.

4. The museum develops, implements, and evaluates a risk management plan for all special events.

Health and Safety

5. The museum complies with public health and safety regulations.

TIP The Governing Authority and museum management are responsible for the health and safety of visitors and all museum personnel. The museum must ensure the safety of its buildings and public areas and provide healthy, safe working conditions. This not only ensures the well-being of all those who visit or work within the museum but also reduces the potential liability to the museum in the event of an accident. Museums responsible for food service facilities need to be especially careful in their compliance with public health and safety regulations.

6. One or more individuals are responsible for monitoring and advising on health and safety matters.

TIP Where a conservator is on staff this individual is often named safety officer.

7. The museum has a first aid box and at least one staff member who is trained to provide first aid including cardiopulmonary resuscitation.

8. The museum has a list of all chemicals, which are marked and identified, used by the institution and museum personnel are knowledgeable of their ingredients, effects, and hazards.

TIP Saskatchewan labour legislation requires all employers to use the Workplace Hazardous Materials Information System (WHMIS) to inform all employees about the dangers/risks of materials used in the workplace. For further information contact the Saskatchewan Ministry of Labour Relations and Workplace Safety and WorkSafe Saskatchewan.

9. The museum ensures that the restrooms are clean, well maintained and located within easy walking distance of the exhibition areas.

Physical Plant and Premises

10. The museum ensures it is in compliance with the National Building Code of Canada and the Saskatchewan Uniform Building and Accessibility Standards Act and Regulations.

TIP The physical plant and premises of the museum needs to be well maintained in compliance with building code regulations and historic properties acts in order to ensure the public trust and accountability responsibilities of the museum are fulfilled. Information about the National Building Code of Canada is available from the National Research Council of Canada and information about the Saskatchewan

Uniform Building and Accessibility Standards are available from the Saskatchewan Department of Public Safety Protection and Emergency Services.

11. Museums located within historical buildings ensure compliance with the Saskatchewan Heritage Property Act as well as the Standards and Guidelines for the Conservation of Historic Places in Canada developed by Parks Canada where applicable.

TIP

Standards and Guidelines for the Conservation of Historic Places in Canada are available from Parks Canada.

12. Where the museum is retrofitting or renovating an existing building for new uses as a museum, it undertakes engineering evaluations of floor and structure loading to ensure the structure can accommodate the weight of furnishings, artifacts, and potential audiences.
13. Regular building inspections are conducted to ensure proper functioning of plumbing, heating, and electrical systems.
14. The museum has a schedule and assigns one or more individuals to be responsible for conducting regular cleaning, maintenance, and repair of its building and grounds.
15. The museum ensures that restrooms and cloakrooms are adequate for the number of museum personnel and visitors.
16. The museum ensures corridors, stairs, and all public areas are well lit.
17. When facility maintenance and repair is contracted to an outside agency, the museum has established procedures for and monitors the service provided.
18. Museum owned roads and sidewalks are always maintained in a safe condition including proper snow removal in winter.
19. Outdoor trails or paths are laid out to ensure the visitors' physical safety.
20. The museum ensures sufficient space is available for unloading and loading of buses.
21. The museum provides signage in the language(s) which best meets the needs of its primary audience(s) or where mandated by law.
22. Clear external and internal signs are posted prominently, using symbols rather than words wherever possible.

Security

23. The museum conducts a regularly scheduled audit of its security and fire protection programs and an inspection of its alarm systems.

TIP Museums take measures to ensure the security of visitors and staff as well as the artifacts. The museum's buildings and collections are assets held in trust for the public and must be secure at all time from theft, vandalism, and other forms of destruction. Security risks are assessed and managed to minimize their impact.

TIP Fire extinguishers must be checked monthly and staff and volunteers should be trained on how to use fire extinguishers.

24. One or more individuals are responsible for overseeing security.
25. Public areas of the museum are supervised at all times during opening hours.
26. Large items carried by visitors are left at the entrance desk or in a monitored cloakroom.
27. A written security manual is used to outline daily opening and closing routines, regular security inspections, and emergency procedures.
28. The museum consults with security experts concerning risk prevention measures and their implementation.

TIP Many local police services provide assistance with identifying and managing security risks. In addition, the museum's insurance provider should be able to provide assistance identifying the potential risks a museum faces along with ways to mitigate those risks.

29. The museum uses appropriate security measures.

TIP High quality impact and pick-resistant locks on all doors and windows should be used to protect museum buildings. When possible, intrusion alarms that are electronically monitored should also be used. Electronic monitoring for fire and water is also beneficial.

30. The building exterior and grounds are regularly inspected for potential security risks.
31. Museums that are closed in winter have walkways regularly shovelled and have routine, periodic security checks to discourage vandalism or theft.
32. All museum personnel are familiar with security procedures.

33. A logbook is kept to note observations that could be considered a security risk.

TIP The logbook should be regularly reviewed by management and include steps taken to address identified security risks.

34. The museum's exhibit and storage areas are monitored and can be sealed off from other areas of the facility.

35. All museum personnel and members of the public admitted to non-public areas of the museum must sign in and out.

36. Storage areas have key controlled access.

37. Visiting researchers are permitted physical access to artifacts at the discretion of the individual assigned responsibility for collections' management and only under supervision.

38. When researchers are given physical access to artifacts, records are maintained on the researcher as well as the artifacts they have accessed. Each artifact is checked and recorded before the researcher leaves the premises.

39. All material, including incoming and outgoing loans, entering and leaving the museum is supervised and recorded.

40. All workers are supervised when entering, working in, and leaving the museum including outside service providers such as plumbers, electricians, auditors, appraisers, etc.

41. The museum has policies and procedures for all photography done on the premises by museum personnel and visitors.

TIP When developing a photography policy, it is important to keep in mind copyright and privacy laws. For example, if a museum allows visitors to take pictures of exhibits, the visitor owns the copyright to the pictures not the museum. Protecting privacy is also very important especially if the museum shares pictures of people through social media channels. It is important to have written permission whenever identifiable pictures of people are used regardless of the purpose.

Firearms

42. The museum stores, displays, and transports all non-restricted firearms as required by law with written approval by the Chief Firearms Officer of the province.
43. The museum stores, displays, and transports all restricted and prohibited firearms as required by law with the written approval of the Chief Firearms Officer of the province.

TIP Federal legislation defines how firearms are to be stored as well as the precautions to be taken when firearms are displayed and / or transported. Antique firearms are exempt from licensing and registration requirements. However, under the Firearms Act antique firearms must be stored, displayed, and transported unloaded.

44. The museum takes similar precautions with regards to restricted and prohibited weapons as well as objects that could be used as weapons.
45. All employees and volunteers who handle firearms have a valid Possession and Acquisition Licence (PAL).

TIP Museums must have a Firearms Business License to possess firearms, restricted or prohibited weapons, and/or prohibited devices.¹³

Emergency Preparedness

46. The museum has a written emergency response plan, based on an evaluation of probable risks, which outlines risk management procedures and specifies what will be covered by commercial insurance.
47. One or more individuals are assigned responsibility for monitoring the emergency response plan.
48. The emergency response plan is reviewed with staff and volunteers on a regular basis.
49. The museum consults with emergency preparedness professionals concerning risk prevention measures and their implementation.

¹³ Royal Canadian Mounted Police. (2015). *Firearms Businesses (including museums)*. Retrieved from www.rcmp-grc.gc.ca/cfp-pcaf/fs-fd/fab-eaf-eng.htm

TIP Municipalities may have staff with expertise in emergency preparedness. In addition, the Canadian Conservation Institute and the Saskatchewan Emergency Planners Association are other organizations that can provide information on emergency preparedness.

50. The museum complies with the National Fire Code of Canada.

TIP Updated Fire and Building Codes for Canada can be obtained from the National Research Council of Canada.

51. The museum consults with the Provincial Fire Commissioner and has implemented all recommendations regarding fire detectors, alarms, reporting, and suppression systems.

TIP Where a choice is possible in fire suppression systems, dry pipe systems are preferable to wet pipe systems and halotron systems are preferable for archives. Halon, the gas referred to in the previous editions of *Standards for Saskatchewan Museums* has been made illegal due to its ozone-depleting properties. Halotron is an environmentally less harmful gas that is replacing Halon as a fire suppressant.

52. Regular emergency drills are conducted with all museum personnel.

53. Museums with specialized collections, such as archives or photographic collections, seek expert advice regarding fire safety and suppression systems.

54. All museum personnel know and understand the proper procedures in the event of an emergency.

55. There are prominently posted floor plans to mark exit routes in case of fire and other emergencies.

56. Emergency exits are clearly marked and exit doors open outward.

Liability

57. The museum is insured for public liability or has made equivalent provisions.

TIP Transferring liability involves making someone else responsible for potential risk(s). There are three ways museums can transfer liability after all possible precautions have been put in place to reduce that risk. The first is for the museum to purchase insurance, the second is to have participants sign a waiver, and the third is to contract out the work. However, transferring liability does not exclude the museum from its duty of care.

58. The museum has liability insurance for governing authority members to protect them when exercising their duties and to safeguard the museum from unlawful and inappropriate action.

TIP This is often referred to as Director's Liability Insurance or Errors & Omissions Insurance.

59. In the case of bonded employees, the museum has staff fidelity insurance to insure the museum against dishonest or fraudulent activities of staff members.

60. The museum has comprehensive insurance coverage that includes coverage for buildings, equipment, and furnishings.

TIP It is important to have adequate insurance coverage to protect the museum and its collections as well as Directors Liability insurance and coverage for staff. Specialized insurance packages are available to museums as well as group coverage that reduce costs and shares risks among participating institutions. Museums may insure all or part of their collection. To do so the museum must determine the current monetary value of the objects in question in order to determine the insurance premiums.

61. The museum ensures that artifacts on loan, while in transit or on the premises, are covered by insurance.

62. When staff provide artifact identification and/or valuations they are insured against allegations of incorrect advice on identifications.

TIP Museum staff or volunteers may undertake the identification of objects as a service to the general public. The Canadian Museums Association's *Ethical Guidelines* outline the conditions under which museum staff or volunteers can undertake appraisals for third parties. Museum staff or volunteers may conduct appraisals on proposed donations to the museum for income tax purposes provided the value is less than \$1000 and they have the necessary knowledge and skills to do so

63. The museum ensures that staff is covered through the Worker's Compensation Board.

64. In cases where the museum owns a vehicle, the museum has vehicle operating insurance and ensures that all personnel who operate the vehicle have a valid driver's license.

65. When the museum employs the use of signed waivers to gain informed consent the language is clear and conforms to legal requirements.

TIP

It is not possible to waive children's rights however if a parent or legal guardian signs a waiver they are declaring that they understand the risks involved in the activity.

66. When contracting out for services or hiring Project Consultants the museum ensures that the contract includes a Liability and Insurance clause that limits the museum's responsibilities.

H. Information Management

Museums collect and generate a large amount and variety of information in their day-to-day operations. It is essential that the information be collected, stored, and shared in an ethical and legal manner. Therefore, the museum must ensure that information management systems are in place to facilitate not only the collection and safe storage of information, but also the efficient retrieval of information. Moreover, policies must be in place to ensure information is shared in a fair and unbiased way. This includes how technology can be used to manage information.

Information management includes not only paper records but also all electronic records generated by the museum.

Corporate Records

1. The museum uses an established information management system to maintain the records generated in the day-to-day operation of the museum.

TIP Corporate records include not only financial records but also the incorporation documents, minutes of board and committee meetings, grant applications, follow-up reports, membership records, exhibit development files, contracts, etc.

2. The museum regularly backs up electronic files and databases and stores a copy off-site in a secure location.

TIP A simple way to ensure data is securely stored in an off-site location is to back up data onto a portable hard drive and store it in a safety deposit box. With 2 portable hard drives, data can be backed up weekly on one drive and then switched with the other drive once a month.

3. The museum has retention and disposal policies and practices in place.

TIP It is a good practice to keep all financial records for a minimum of 6 years. The Canada Revenue Agency¹⁴ requires charities to keep records for a period of 6 years from the last tax year that they relate to. Risk management records should be stored indefinitely.

4. The museum ensures the disposal of all records containing personal information leave no recoverable trace of personal data.

TIP When recycling old computers, remember that simply deleting a file stored on a hard drive or disk does not guarantee the information isn't recoverable.

¹⁴ Canada Revenue Agency. (2014). *Books and Records*. Retrieved from www.cra-arc.gc.ca/E/pub/gm/15-1/15-1-e.html

Privacy

5. The museum is familiar with federal and provincial privacy laws and has policies and procedures in place to ensure appropriate collection, use, and storage of personal information.

TIP Privacy Rights are related to Human Rights, for more information contact the Saskatchewan Information and Privacy Commissioner and/or the Privacy Commissioner of Canada.

6. The museum ensures that all personal information is collected, used, and disclosed for the sole purpose for which it was originally collected unless express consent is given to do otherwise.
7. The museum conducts a regular audit of the information it collects to ensure that they are in compliance with federal and provincial privacy legislation.

TIP Consider the following questions when conducting a Museum Information Audit: What personal information is collected? Why is the information collected? What is it used for? Where is personal information kept and how is access controlled? For example can anyone in the museum access personal information or is it restricted to only those people who need it? What happens to personal information when the museum no longer needs it?

8. The museum provides a clear statement of purpose when collecting information and an opportunity for individuals to opt out if they so choose.

I. Intellectual Property

Intellectual Property refers to creations of the mind, such as inventions; literary and artistic works; designs; and symbols, names and images used in commerce.¹⁵

Intellectual Property Rights are legal rights extended through:

- Patent: protects inventions
- Copyright: protects original works of authorship that exist in tangible form
- Trademark: protects distinctive words, phrases, symbols, and designs that identify and distinguish specific goods and services
- Trade secret laws: protects information that confers value and competitive advantages.

For more information about Intellectual Property and the different types of property rights refer to the Canadian Intellectual Property Office.

General

1. The museum has an Intellectual Property Policy that addresses both the assets created by the museum as well as the assets created by others/third parties and includes policies related to patent, copyright, trademarks, and trade secrets.

TIP The museum should be aware of the particular concerns around indigenous intellectual property and consult appropriate organizations for guidance. CARFAC¹⁶ also has links to material related to traditional knowledge through Indian and Northern Affairs Canada and the World Intellectual Property Organization (WIPO).

2. The museum recognizes intangible heritage as part of its Intellectual Property Policy.

TIP The Intellectual Property Issues in Cultural Heritage (IPinCH) has resources related to the rights, values, and responsibilities of material culture, cultural knowledge, and the practice of heritage research.

3. The museum has procedures in place to ensure the proper use of museum assets related to intellectual property rights.

¹⁵ World International Property Organization. (nd). *What is Intellectual Property?* Retrieved from <http://www.wipo.int/about-ip/en/>

¹⁶ CARFAC Saskatchewan. (nd). *Traditional Knowledge*. Retrieved from www.carfac.sk.ca/knowledge-bank/traditional-knowledge

- TIP** For information on developing Intellectual Property Policies look for the How-To Guide for Museums available from the Canadian Heritage Information Network (CHIN) website.

Patent

4. Where applicable the museum addresses the issue of patent within its Intellectual Property Policy to protect both the interests of the museum and the staff involved in the development of the work.

- TIP** Patent is most relevant to science museums, science centres, and natural history museums because their research can lead to patentable works. However, the cost of administration for patents can be high thus few museums pursue this line of revenue.

Copyright

5. The museum is familiar with and adheres to Canadian Copyright laws that protect creators, consumers, and the public domain.

- TIP** Information about the *Canadian Copyright Act* is available from the Canadian Intellectual Property Office.

- TIP** Museums must consider issues related to copyright when acquiring items for their collections, exhibiting works of art, reproducing images for publication and catalogues etc.

6. The museum protects its own collections, programs, and publications with respect to copyright including its own web site and any other digital content it has created for the Internet.

7. The museum respects the rights of other creators and negotiates agreements that include procedures to be followed to ensure appropriate credit and/or compensation is provided for the use of all copyright material.

- TIP** Copyright laws define economic rights related to the right of reproduction and the right of exhibition and therefore affect museums that mount exhibits and reproduce works of art or images for use in catalogues or on web sites. This often will include the payment of a fee for the use of the copyright material in an exhibit, publication, website, etc.

TIP In Saskatchewan, the *Arts Professions Act*¹⁷ requires a written contract between artists and anyone wanting to engage, contract, hire, or enlist their services. The Act also lists the basic elements that must be covered by the contract. CARFAC has templates available for contracts and fee payment requirements.

Moral rights cannot be assigned (sold or given away) however, the creator of the work may agree, in writing, not to exercise his/her moral rights.

8. The museum adheres to the concept of fair dealing that allows for use of copyright material without permission under specific circumstances and has a written policy addressing reproduction rights.

TIP Fair Dealing allows for the use of material without permission for the purpose of research, preservation, private study, criticism, review, or news reporting. When a substantial part of a work is to be used consideration is then given to both the quality and quantity of the part used. This is necessary when requests for copies or loans are received for material for which copyright has been determined. If there is any doubt about whether the fair dealing provision applies copyright permission should be obtained.

9. When it is not possible for the museum to obtain copyright for objects in its collection the museum locates and maintains records of the copyright holder.
10. Procedures are established to ensure appropriate credit is given to copyright holders of objects in the museum's collections.

TIP This includes, but is not exclusive to, photographic collections including photographs of artifacts in collections, archival collections, and/or fine art collections.

Trademarks

11. The Museum ensures the appropriate use of its own name and associated marks including but not limited to: exhibit titles, designs, logos, and domain names.

TIP The museum's name is intrinsically connected to its reputation within the community and the programs and services it provides. Inappropriate use of the museum's name could have a negative impact on the public's trust in the organization.

12. Both paid and volunteer staff respect third party trademarks made available to them in the course of their work and adhere to any agreements signed for their use.

¹⁷ The Queen's Printer. (2010). *The Arts Professions Act*. Retrieved from www.pcs.gov.sk.ca/arts-professions-act

TIP

Because museums often use third party trademarks it is important to include the organization's philosophy about using such marks in their Intellectual Property Policy.

Trade secrets

13. The museum acknowledges their ownership of trade secrets in their Intellectual Property Policy and ensures the protection of information such as donor lists and marketing plans.
14. Both paid and volunteer staff respect third party trade secrets made available to them in the course of their work and adhere to any agreements signed for their use.

COLLECTIONS

In this section:

Collections Management

Conservation

Storage

Research

COLLECTIONS

Collections is broken down into the following 3 sections; please read the descriptions to determine what you are looking for.

Collections are the defining characteristic of museums. The artifacts and information held by museums are the foundation upon which everything else they do is built. While the museum's collection is its greatest asset, unless it is properly managed and cared for, it can become its greatest liability. In order to fulfill their public trust obligations, museums develop policies and procedures, which direct how their collections will be cared for and used.

A. 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 artifact itself but as importantly, the history and records relating to the artifact.

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 artifacts and their stories provide the basis for exhibits and programs.

B. Conservation

Collections care 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 museum. This can include everything from how artifacts are handled and transported, to the monitoring and controlling of temperature, relative humidity, and light, to pest management.

Treatment conservation involves taking active measures to stabilize or reverse the effects of deterioration on an artifact. Cleaning and artifact stabilization are two examples of treatment conservation. Only an appropriately trained individual undertakes treatment conservation.

C. Storage

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

D. Research

As public institutions, museums 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 museum serves. The research activities undertaken by a museum are therefore an important way for the museum to demonstrate its commitment to the public and fulfill its public trust responsibilities. Research activities can be undertaken by museum staff and volunteers as well as outside researchers. Regardless of how it is conducted, research must be grounded in best practices and adhere to ethical guidelines.

A. 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 artifact itself but, as importantly, the provenance and documentation relating to the artifact.

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 artifacts and their stories provide the basis for exhibits and programs.

General

1. The museum has a written Collections Management Policy that stems directly from its mission statement and includes a commitment to reflect the community they serve in all its diversity.

TIP See MAS' *Mission Based Collecting* Tip-Sheet for more detailed information.

2. The museum has a collecting mandate that identifies gaps and duplicate artifacts in the collection as well as how these issues are being addressed.
3. The development and management of the museum's collection is conducted in compliance with all relevant provincial and federal legislation.

TIP This includes all aspects of the Government of Saskatchewan's *Heritage Property Act* and all similar federal regulations, such as Firearms legislation. Information about federal firearms legislation is available from the Canadian Firearms Centre.

4. The museum recognizes the importance of both the tangible and intangible aspects of an artifact and ensures that both the physical attributes are documented as well as its provenance.
5. The museum recognizes 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.
6. One or more individuals are assigned responsibility for collections management activities including collections documentation, cataloguing, loans, etc.
7. The museum provides sufficient training for museum personnel involved in managing the collection.

8. Detailed, written collections management procedures are developed to support the Collections Management Policy.

TIP The Museums Association of Saskatchewan's *Collections Documentation Manual* provides procedural information that supports the activities described in the policy including accessions, cataloguing, loans, etc.

9. The museum holds clear legal title to all artifacts acquired.

TIP A Keeping House would not hold clear, legal title for items in its care. A Keeping House acts as a holding facility for sacred and secular items being returned to their community of origin.

10. The museum creates a Statement of Significance for individual artifacts or groups of artifacts in the permanent collection that is used to inform all decisions about the life of the artifact.

TIP A Statement of Significance is used to inform decisions about how an object will be used, cared for and stored as well as recovery plans in the event of an emergency. In addition the statement serves to encourage research and can be used to substantiate grant applications and other fundraising activities as well as advocacy efforts.

TIP MAS' *Understanding Provenance* Tip-Sheet talks about the significance of objects.

11. The museum conducts regularly scheduled inventories of the collection to ensure that records are up to date.

TIP The frequency of inventories, and whether the entire collection is examined at one time, depends on the size of the museum's collections and the resources available. If a complete inventory cannot be completed regularly (every 1-2 years), then a portion can be undertaken each year until it is complete.

Acquisition

12. The museum has written acquisition procedures included in its Collections Management Policy.

TIP Museums have an obligation to ensure they acquire objects for their collection in a legal and ethical manner. This is accomplished with the development and implementation of policies, agreements, and procedures for the acquisition of objects by the museum.

TIP MAS' *Acquisition Evaluation* Tip-Sheet can assist museums with this process.

13. The museum has a written policy prohibiting the active acquisition of sensitive items by institutions not under First Nations or Métis jurisdiction or unless mandated with the full involvement of the appropriate First Nations or Métis as equal partners.

TIP For a list of examples of sensitive items refer to *Appendix B – First Nations & Métis Standards and Resources*.

14. The museum's governing authority can delegate decision-making authority for acquisitions to either an acquisitions committee or to an individual.

TIP The existence and activities of an acquisition committee do not preclude the use of "director's discretionary funds" and associated decision-making power approved by the governing authority.

15. The museum has a standard transfer of ownership agreement in the form of a written document or contract that is used when objects are acquired for the permanent collection and legal title of ownership transfers to the museum.

TIP MAS has many sample forms for museums to use in the *Collections Documentation Manual*.

16. The museum collects only those artifacts for which it can properly care, preserve, store and provide public access.
17. The museum does not acquire materials or artifacts that have been illegally or unethically obtained.
18. The museum does not directly or indirectly acquire any material that has been collected, sold, or otherwise transferred in contravention of any provincial, national, or international wildlife protection or natural history conservation law or treaty.
19. The museum does not acquire any cultural material collected, sold or otherwise transferred in contravention of the 1970 *UNESCO Convention on the Means of Prohibiting and Preventing Illicit Import, Export and Transfer of Ownership of Cultural Property* as ratified by the Government of Canada on June 20, 1978.¹⁸

¹⁸ UNESCO. (2015). *Convention on the Means of Prohibiting and Preventing Illicit Import, Export and Transfer of Ownership of Cultural Property*. Retrieved from www.unesco.org/new/en/culture/themes/illicit-trafficking-of-cultural-property/1970-convention/

20. The museum does not acquire any archaeological or paleontological material if there is any reason to believe that its recovery involved illegal excavations, unscientific methods, or intentional destruction or looting of known archaeological sites.
21. The museum does not acquire any archaeological or vertebrate paleontological object found or taken from the land of Saskatchewan without the permission of the Minister as stated in the *Saskatchewan Heritage Property Act*.
22. Donations with unreasonable or limiting conditions are not accepted by the museum.
23. A condition report is completed by a trained, designated person at the time of acquisition and kept in the master file.

Documentation

24. The museum has written collections documentation procedures or documentation procedures are included in the museum's written Collections Management Policy.
- TIP** Recording information about artifacts provides a complete history of the artifact including its provenance, conservation treatment, loan, use for exhibition, scientific sampling, and publication.
25. A unique number is assigned to each artifact that is accessioned by the museum.
- TIP** Numbers are assigned for objects temporarily in the museum for loans, for research, or being considered for potential acquisition. The numbering systems will generally not be the same for the permanent collections and the loan collections.
26. The artifact's number is applied in a uniform manner.
- TIP** The process of applying a number to an artifact is known as labeling or marking and is done in order to make identification and location of a specific artifact possible.
27. Each artifact type has a designated location for placement of its number.
- TIP** For example the location for the number on all chairs in the museum's collection may be the top of the right rear leg immediately below the seat.
28. Artifact numbers are applied using accepted conservation methods and materials.

29. The museum has an accession register where it records all of the artifacts in its possession.
30. A second copy of the register is stored off-site or in a certified fire retardant safe.
31. The museum has a master file for each artifact in the collection.

TIP Alternative names are: catalogue file, object file, document file.

32. The physical location of each artifact is recorded in its master file.

33. The source of each artifact is recorded in its master file.

TIP The source is generally the donor or lender of the artifact.

TIP Where the source is unknown this information is also recorded in the master file.

34. Information related to patents, copyright, and trademarks is documented and kept in the master file.

TIP Standard release forms may be used as part of the accessioning process. The copyrights involved may include economic rights, such as exhibition rights and/or reproduction rights, as well as whether or not moral rights have been waived.

TIP Computerized collections management database systems often combine an artifact's registration and curatorial information into one electronic record, eliminating the need for separate accession registers, catalogue files, master files etc. However, like paper records, a computerized backup of the database system should be regularly updated and stored off-site.

35. There is an inventory of all First Nations and Métis collections in the museum.

36. The inventory of the First Nations or Métis collections is made available to First Nations and Métis communities upon request; a copy of the information is provided to the MAS office upon request.

37. First Nations and Métis people participate in the documentation of First Nations and Métis collections.

38. Replicas are accessioned with complete documentation that clearly identifies them as copies of the originals.

TIP Collections of replicas are considered *bona fide* museum artifacts only if originals are no longer in existence or are inaccessible or the replicas have intrinsic merits on their own in addition to the originals they represent.

- TIP** Original photographs and documents, while containing images that may be reproduced, have intrinsic value as unique artifacts and are to be cared for accordingly.

Cataloguing

39. The museum has a written Collections Management Manual that outlines cataloguing procedures to be followed.

TIP Cataloguing is the act of compiling a comprehensive record of all available information concerning a particular artifact. Proper cataloguing procedures ensure consistency in collections documentation and facilitate the organization and retrieval of information.

40. The museum has established the units of information to be recorded about each artifact as well as the rules and conventions for recording the data.

TIP For examples see the CHIN Humanities Data Dictionary.

41. The museum uses an established classification system to assist in grouping artifacts. For example: *Chenhall Nomenclature* and *Art & Architecture Thesaurus*.

TIP Artifacts are usually classified by function, however, where existing classification systems are insufficient, museums may need to modify or supplement them. For multi-disciplinary museums different systems may be developed for different types of collections, for example archaeological, biological, and mineral collections or historical, ethnological, technological, and archival collections.

42. The museum uses standardized terminology and formatting for key access points in their records.

TIP Where existing vocabularies are insufficient, museums may need to modify or supplement them. For more information museums can refer to the CHIN Professional Exchange web site where a series of resources related to documentation standards for museums are available.

43. All artifacts in the collection are catalogued as fully as possible using either a manual or computerized system with one copy of the records stored in a secure place and a second copy stored off site.

44. Oral histories are catalogued as artifacts within the collection using the museum's cataloguing procedures.

TIP Oral histories should be catalogued with a brief summary and the interviewee's biographical information. Ideally transcripts of audio and video recordings should be written as well.

45. Where the museum uses a manual cataloguing system it uses permanent ink or typed records.
46. When catalogue records include confidential information access to that information is controlled in compliance with privacy legislation.

TIP Confidential information may include valuation details for insurance or tax purposes and/or personal information about specific individuals.

47. The museum has procedures in place for updating catalogue records when new information becomes available.
48. The museum includes a graphic representation of the artifact in its catalogue record such as a photograph or a sketch.
49. Where a museum chooses to digitize its collection, established best practices are followed.
50. For multi-departmental museums, both centralized and departmental records or indexes are maintained.
51. The museum includes artists' resumes in the artifact's master file, where applicable.

Deaccessions

52. The museum has written deaccessions procedures or deaccessioning is addressed in its Collections Management Policy.
53. Objects should only be accessioned by the museum with the full intent that they remain in its collection in perpetuity.
54. Final decisions regarding deaccessions are made by the governing authority or its designate.
55. The museum records and documents all deaccessions and retains all documents and files pertaining to deaccessioned artifacts.
56. Deaccessioned artifacts will not be returned to the original donor or their descendants.

TIP The Canadian Customs & Revenue Agency in its publication *Registered Charities and the Income Tax Acts* states that “in most cases a registered charity cannot return a donor’s gift. At law, a gift transfers ownership of the money or other gifted property from the donor to the charity. Once the transfer is made, the charity’s governing documents oblige it to use the gift in carrying out its charitable purposes.”¹⁹

57. The museum offers deaccessioned material to other museums and related public institutions by exchange, gift, or sale before it is offered at public auction.
58. Deaccessioned artifacts must be disposed of unless they have been stolen or lost.
59. Funds received from the sale of deaccessioned artifacts are used exclusively for the direct benefit of the collection, either through acquisitions or direct improvements to collections care.
60. Deaccessioned First Nations or Métis sacred and/or sensitive items are not offered to other museums. The museum contacts the appropriate First Nation or Métis community for assistance.

TIP Contact the Museums Association of Saskatchewan regarding appropriate contacts in Saskatchewan.

Repatriation

61. The museum has a written Repatriation Policy or set of procedures for repatriation of First Nations and Métis items consistent with the recommendations of the *Task Force Report on Museums and First Peoples*.

TIP Items can be removed from the collection through a formal process of repatriation where the museum collaborates with First Nations and Métis groups to return items to their ownership and care.

TIP *The Task Force Report on Museums and First Peoples* states, “The treatment, use, presentation and disposition of sacred and ceremonial objects and any other objects of cultural patrimony should be decided on moral and ethical grounds with the full involvement of the appropriate First Nations as equal partners.”²⁰

62. The museum ensures that human remains are not held in its collections.

¹⁹ Canada Revenue Agency. (2012). *Qualified Donees – Consequences of returning donated property*. Retrieved from www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/cgd/rtrng-dntd-prpty-eng.html

²⁰ Hill, T. & T. Nicks (1992). *Report on the Task Force on Museums and First Peoples*. Ottawa, Ontario: Canadian Museums Association and the Assembly of First Nations.

63. The museum arranges for the immediate re-interment of human remains, both partial remains and whole skeletal remains.
64. The museum arranges for the immediate re-interment of items known to be funerary items.
65. No reproductions of funerary items are made or used in the museum.
66. Reproductions of sacred or sensitive items are not made or used in the museum.
67. The museum recognizes and supports culturally based practices relating to First Nations and/or Métis collections.

TIP An example of such practice would be allowing visiting Elders and Traditional Practitioners to burn sweetgrass for a Smudge Ceremony. A separate room could be provided for this purpose. For more information on protocols related to culturally based practices contact the Saskatchewan Indian Cultural Centre and/or the Gabriel Dumont Institute.

Loans

68. The museum has a written Loans Policy.

TIP Because museums hold their collections in trust for the public, they have a legal and ethical responsibility to safeguard artifacts through the creation of loans policies, agreements, and standards of care related to loans.

69. The museum has a standard Loan Agreement in the form of a written document or contract that is used for incoming loans.
70. The museum has a standard Loan Agreement in the form of a written document or contract that is for outgoing loans.
71. A loan file is created for each loaned artifact.
72. The museum issues a temporary deposit receipt for all incoming material on temporary deposit or loan.
73. Artifacts are not loaned if they are judged by museum personnel to be too fragile or if travel or conditions during the period of the loan may endanger the artifacts.

74. Permanent or long-term loans are not accepted by the museum. Only loans lasting one year or less are accepted.

TIP If the museum requires a loaned object be kept for a period lasting longer than the original one year agreement, the museum and loaning institution must re-negotiate a new loan agreement (again, not lasting longer than one year) following the original's conclusion. New condition reports must also be completed if loans are renewed.

75. Loans from private individuals are accepted on a short-term basis or on a non-renewable fixed term with the artifact being returned to the lender or formally donated to the museum at the end of the loan period.

76. Loans are made to other museums or affiliated groups only when acceptable standards of artifact care (i.e. environmental conditions, insurance etc.) can be assured.

77. Condition reports are done for each loaned object at the onset and at the completion of the loan period.

TIP When loaned objects are put in a travelling exhibition, condition reports should be completed at each venue upon arrival and before departure to the next venue.

78. Responsibility for the insurance of objects on loan is clearly identified in the written loan agreement.

TIP Insurance is either covered as an extension of the lending museum's own policy or through a policy taken out by the borrower that is reviewed and accepted by the lending museum. Typically the borrower is expected to pay for the costs of insurance.

Identification, Authentication, and Appraisals

79. Where the museum offers identification and authentication services, the museum has a written policy for dealing with inquiries and requests for object identification or authentication.

80. No identification or authentication is made when there is reason to believe that an object's acquisition history conflicts with the criteria outlined by the institution for its own acquisitions or where there is reason to believe that identification may be used to improperly promote the value of an item or encourage illegal or unethical traffic in artifacts.

81. A written disclaimer stating that museum personnel are providing an opinion only and cannot be held responsible for any error accompanies all identifications or authentications made by the museum.
82. One or more individuals are assigned responsibility for coordinating object identification and/or authentication activities.

TIP All inquiries are directed or delegated to the individual most qualified to deal with them.

83. The museum has a written manual outlining object identification and authentication procedures and practices.
84. For inquiries involving artifacts in the institution's collection, care is taken to protect confidential information.

TIP Confidential information is defined in the museum's Collections Management Policy.

85. Any objects left on the premises for identification are covered by a release form or receipt signed by the owner and the authorized museum personnel.
86. Objects left with the museum for identification are tagged, recorded using a Temporary Deposit Form, and safely stored. Insurance coverage is agreed to at the time of deposit.
87. Objects temporarily deposited at the museum are stored separately from the collections.

TIP This reduces the chance of confusion and keeps potential pest problems out of the collection storage areas.

88. Written requests are required to initiate a process of identification and authentication of artifacts and a record is kept of all requests.
89. A qualified staff or volunteer may appraise an object for the purpose of a tax receipt if the object is valued at \$1000 or less. The appraisal must reflect the fair market value of the object, which can be supported by pricings of similar objects.²¹

TIP If an outside appraisal is required the donor will cover its cost. The museum may choose to accept this appraisal cost as a donation and issue an additional tax receipt to the donor for its value.

²¹ Canada Revenue Agency. (2003). *Appraisal*. Retrieved from <http://www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/csp/csp-f07-eng.html>

B. Conservation

Equally important to the museum is ensuring the proper care of its collection whether on display or in storage. Collections care covers a range of preventive measures as well as conservation treatments.

Preventive conservation strives to minimize the causes of deterioration by controlling the agents of deterioration in both the exhibit and storage areas of the museum. This can include everything from how artifacts are handled and transported to the monitoring of and controlling temperature, relative humidity, and light to pest management.

Treatment conservation involves taking active measures to stabilize or reverse the effects of deterioration on an artifact. Cleaning and artifact stabilization are two examples of treatment conservation. Generally, appropriately trained individuals only undertake treatment conservation activities.

Museums must balance their need to preserve and document the artifacts and information in their collection with the public's need to experience those same artifacts and information.

General

1. The museum has a written Conservation Policy or conservation is included in the museum's Collections Management Policy.
2. One or more individuals are assigned responsibility for the care of collections including pest management.
3. The museum's extension/education collections contain only artifacts that were accessioned specifically for that purpose.

TIP These may include duplicates, replicas, or artifacts that are easily replaced. While extension/education collections could be damaged or eventually destroyed during use, care and conservation measures similar to those for permanent collection must be followed.

4. Demonstrations and hands on activities use only extension or education collection's artifacts that are considered expendable.

TIP Models, replicas or audio-visual records should be substituted for originals for demonstration purposes wherever possible.

5. The museum considers requests for artifact loans by balancing the potential for artifact deterioration and public access.

TIP For example instead of lending photographic negatives; wherever possible prints are made only from other prints, and photocopying of colour prints or archival documents is avoided.

6. The museum has a written policy regarding facility use by outside agencies.

TIP This would include museum use by film crews, weddings, conferences, etc.

Artifact Handling and Transportation

7. The museum has written procedures that describe proper collections handling and care procedures.

TIP Proper handling and transportation of artifacts is necessary to preserve and protect the museum's collection when moving artifacts within the museum and transporting artifacts off the premises.

8. The museum ensures that orientation and training is provided for all museum personnel involved in artifact handling and transportation.

9. Artifacts are handled as little as possible.

TIP Some artifacts may be handled using clean hands however, cotton or latex gloves should be worn especially when handling metal, textiles and sensitive materials that may be affected by sweat and oils from hands.

10. Proper personal protective equipment is worn when handling biological collections as they may have been treated with potentially harmful preservative compounds.

11. Before handling, artifacts are examined for damage or weak areas as outlined in the museum's collections handling and care procedures.

12. Artifacts are properly supported when handled as outlined in the museum's collections handling and care procedures.

TIP Artifacts are not moved or picked up by handles, appendages or vulnerable areas.

13. Artifacts are moved on trolleys or trays with packing and supports sufficient to prevent damage.

14. Artifacts are not stacked during transport.

15. Where artifacts are to be transported off-premises, research, which may include consulting a conservator, is done to determine specific handling and packing requirements.
16. All crates or containers used to transport artifacts are well labelled with the museum's name and address, "contents fragile" label and directions for handling and opening.
17. The museum ensures that all relevant legislation is followed in the transport and handling of artifacts in its collection.

TIP For example, firearms are packed and transported according to the *Firearms Act* and regulations.

18. Appropriate equipment is used in the handling and transportation of heavy or awkward artifacts.
19. Regularly scheduled condition reports are completed and kept in the master file.

TIP Regular condition reports provide an opportunity to monitor the condition of artifacts over time and ensure appropriate action is taken should problems arise.

Handling of Sacred or Sensitive Items

20. The museum has a written policy that prevents First Nations and Métis items that may be considered sensitive from being photographed, numbered, exhibited or used in programming.

TIP First Nations and Métis sacred or sensitive items require special handling and care. Policies and procedures for the protection and handling of these items within museums are developed in collaboration with First Nations and Métis groups.

21. The museum stores sensitive First Nations and Métis items in a separate location from the rest of the collection.
22. The museum restricts access to sensitive items; access is granted only to traditional practitioners.

Environmental Monitoring and Control

23. The museum reviews established guidelines and standards to determine appropriate environmental conditions and develops a strategy specific to the building and the collection.

TIP Optimum temperature and relative humidity conditions are different for different types of materials. Temperature and relative humidity are related. As the temperature goes down relative humidity goes up. Ideally temperature and relative humidity levels should not fluctuate. It is when the levels fluctuate that damage occurs. The optimum temperature for mixed collections is 21 degrees Celsius, with an acceptable range from 18 – 25 degrees Celsius. The optimum range for relative humidity is from 38% - 55%.

24. The museum monitors temperature and relative humidity on a continual basis or at regular intervals.
25. The museum controls the indoor environment through the use of heating, ventilation and air conditioning systems (HVAC) and monitor and adjusts temperature and relative humidity as required.
26. The museum controls overall air quality and mitigates the collection's exposure to contaminants (i.e. particles and gases pollution) as much as possible.

TIP Controlling air quality is difficult and complex. The best methods of control are ensuring exhibition and storage areas receive good airflow and the building's mechanical systems are functioning at their highest possible level. Selecting storage materials based on chemical composition (i.e. avoiding sulfur) and segregating artifacts that off gas are also ways to maintain good air quality.

27. The museum's ability to control temperature, humidity, light levels, pollutants, and pests must not be compromised by food services offered by the museum.
28. Calibration or verification of monitoring devices is done at regular intervals.
29. Insulating and draft-proofing the museum buffers the building from environmental changes that may adversely affect sensitive material.
30. Silica gel or other buffering material is used to create microclimates in sealed containers where relative humidity control is required.

TIP Examples are storage cabinets and display cases for specific artifacts.

31. The museum takes measures to minimize the effects of freezing and thawing in unheated buildings.

TIP Most collections may remain in unheated buildings over the winter. However, collections that contain some types of fine art or fluid-preserved collections cannot remain in unheated buildings over the winter.

32. The museum ensures appropriate lighting conditions based on established guidelines and standards and develops a strategy specific to the building and the collection.

TIP In exhibitions, museums must balance light levels with the needs of staff and visitors with those of the artifacts on display. For preservation purposes, sensitive materials such as paper require much lower light levels than less sensitive materials like metal.

TIP Light intensity is measured using a lux meter or a camera with a built in light meter. For highly sensitive artifacts such as textiles, watercolours, natural history specimens, colour photographs, prints and drawings optimum light levels are kept at or below 50 lux. Light levels for moderately sensitive artifacts are kept at or below 150 lux. Optimum light levels for less sensitive artifacts such as stone, metal, glass and ceramics are kept at or below 250 lux.

33. The museum monitors and controls lighting levels in storage and exhibit areas to safeguard the artifacts.

34. Daylight is eliminated from storage areas and monitored and controlled in exhibit areas.

35. When necessary UV filters are placed over lights or UV absorbing glass or Plexiglas is used on display cases.

TIP Levels of ultra-violet radiation are measured using a UV meter and are kept at or below 75 microwatts / lumens.

TIP UV levels need to be measured periodically. UV filters and UV absorbing glass/ Plexiglas can deteriorate over time and will need to be replaced when they lose their effectiveness.

36. Lights are kept off unless museum personnel or the public needs them.

37. Incandescent lights that generate heat are kept away from artifacts and never used inside exhibit cases.

Conservations Treatments

38. Professional conservation advice and services are sought before undertaking any conservation treatments.

TIP Conservation treatment refers to activities involving the stabilization, repair, or restoration of artifacts required to ensure their preservation. This work is undertaken only by professionally trained conservators or with their advice and assistance.

39. Museum personnel attempt conservation treatments only when an artifact is in immediate jeopardy and is directed by a professionally trained conservator.
40. Cleaning of an artifact is done only if the artifact or nearby artifacts are in jeopardy or in some cases for aesthetic reasons but never where cleaning threatens an artifact's historical integrity or physical state.
41. Conservation treatment is never undertaken on an artifact on loan until written permission from the owner is obtained, except in cases of emergency.
42. All conservation treatments are fully documented and always include pre-treatment, during treatment, and post-treatment photographs.
43. All treatment and cleaning methods must be conservation-approved and pre-tested on a small area of the artifact.
44. All adhesives and other substances applied to an artifact must be conservation-approved.
45. Any part or pieces detached from artifacts through cleaning or treatment must be labeled and retained.

Exhibit Maintenance

46. One or more individuals are assigned responsibility for routine inspection and maintenance of all exhibits.

TIP Exhibition maintenance includes procedures for care, handling, and physical control of artifacts on display, maintaining proper environmental controls, and ensuring that exhibit labels, display cases, and equipment are properly maintained.

50. The museum has a regular schedule for exhibition maintenance.

51. The museum has a manual outlining conservation-approved procedures for care, cleaning, and maintenance of exhibits.

52. Whenever an artifact is removed from an exhibit, an “artifact removal” card replaces it.

TIP This practice not only ensures audiences receive accurate information but is also useful for the control and security of artifacts on exhibition.

53. The physical condition of artifacts on exhibit is regularly monitored.

54. Training is provided to all museum personnel working with and around exhibited material in artifact handling and general care considerations.

55. The relative humidity and temperature in exhibit spaces is monitored and recorded at regular intervals.

56. Where environmental levels in exhibition spaces cannot be controlled, microclimates are created for sensitive artifacts by using conditioned exhibit cases.

TIP By creating an airtight exhibit case it is possible to control the fluctuations of relative humidity within the enclosed space. Materials that can take up and release moisture, such as blotting paper or silica gel, is placed in the controlled case which will help buffer the air within the case and reduce relative humidity fluctuations.

57. Light levels in exhibit spaces are sufficient for public safety while complying with levels recommended by conservation experts.

58. All sources of daylight are eliminated from exhibit areas.

TIP Unless light intensity and ultraviolet radiation can be measured and controlled within recommended levels.

59. Display cases are either lit from the outside or use well-ventilated and sealed interior lighting systems.

60. The museum ensures that any changes in light levels between exhibit spaces and between exhibit and non-exhibit spaces, is made gradually.

61. The exhibit area is clean and free from dust.

62. Exhibit cases are locked or secured in some manner to protect vulnerable artifacts.

63. Artifacts on display are mounted in a manner that ensures they are not physically damaged or altered.
64. Exhibits and mounts are constructed to minimize overcrowding of artifacts and allow museum personnel reasonable access to artifacts when on display.
65. Artifacts in permanent exhibits are rotated periodically from display to storage to protect them from environmental exposure and to enliven displays.

TIP However, this is not generally possible in the case of permanent natural history specimens in dioramas.

66. Working exhibits, involving active use of artifacts such as machinery, must be operated according to public safety regulations and without detriment to museum environmental conditions, therefore a risk assessment is completed prior to use.

67. Artifacts are not jeopardized by use.

TIP Many First Nations items are meant for use in ceremonies. Decisions regarding the use of First Nations items are made only after consultations with the appropriate First Nation.

68. Only artifacts that are duplicates or exist in other collections are used when working parts might wear out, or might need to be replaced or fabricated.
69. For demonstration purposes models and replicas of objects and audio-visual replacements are substituted for original artifacts, wherever possible.
70. No food, drink, or smoking is allowed in exhibition areas.

D. Storage

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

General

1. Artifacts are stored according to their condition, material composition, and size to ensure long term preservation.
2. Artifact storage locations are standardized, current, and maintained with the artifact's master file.
3. Artifacts are stored in their natural position or that which is most stable.
4. No smoking, food, or drink is allowed in the storage area.
5. Visual storage systems follow standards for exhibits as well as applicable storage standards.
6. Storage cabinets and shelving are clearly numbered and labeled.
7. Artifacts are not stored on top of cabinets or on top of shelving units.
8. Artifacts are supported to prevent accidental movement or shifting.
9. Sensitive materials are protected from wooden shelving and cabinets.

TIP A neutral barrier is required because wood contains harmful chemicals that may damage artifacts.

10. Acid-free paper is used for interleaving and acid-free padding and packing material for artifact storage.
11. Acid-free material is periodically checked for pH stability and is replaced as necessary.
12. Small items are stored in boxes, partitioned drawers or other containers to prevent loss or damage.
13. Boxes and other artifact containers are labelled on the outside with light and water-resistant ink.

14. Artifacts that are hung from s-hooks and hangers may require additional support so that they will not distort over time.
15. Soft artifacts are padded for support and all costumes are hung on padded hangers or stored flat with creases stuffed out using acid free materials.
16. Textiles are never folded; large textiles are either rolled or stored flat.

TIP Example are large rugs, flags, quilts, etc.

17. Large artifacts and those on open shelving are protected, but not sealed, from particle pollution using polyethylene or cloth draping or curtains.
18. Artifacts are protected from accidental discharge of sprinkler systems.
19. Documents are stored in approved archival boxes, envelopes, or map cabinets.
20. Electromagnetic discs or tapes must be protected from proximity to steel or other potential sources of magnetic interference.
21. The museum develops and implements strategies to ensure the long-term availability of digital materials in its collections.

TIP These strategies will address the technological changes affecting digital material and will ensure preservation of access to the digital materials regardless of the medium used.

Planning and Organization

22. The museum seeks professional advice concerning specific collections requirements including the location and design of storage areas.

TIP Proper planning and organization of storage areas is required to ensure that optimum conditions are provided for the safety and preservation of artifacts while in storage.

23. The storage area is large enough for shelving and other storage furnishings, access is not restricted, and artifacts are not crowded together.
24. Space is allowed for growth of the collection and easy access to artifacts.
25. Storage of artifacts is not combined with storage of other materials such as maintenance or cleaning supplies.

26. Non-related activities are not to be carried out in the collection storage area.
27. The museum provides a temporary holding area, isolated and separated from the collection storage and exhibition areas, where workspace is available for inspection and examination of artifacts.
28. Separate areas are created for different components of the collection requiring special care.
29. The museum's extension/education collection is housed in a separate storage area.
30. Where the storage area is not on the ground floor accessibility by a freight elevator or ramp is available.
31. Artifacts are stored in the attic or basement only if it is unavoidable and preventative measures are taken when using these areas.
- TIP** Flood risks are assessed, potential for leaks are monitored and proper drainage is ensured; fans and dehumidifiers are available if necessary.
32. All pipes, electric cables, and ducts are protected, padded or insulated as required by regulation to prevent water or fire damage.
33. All doors in the storage area are large enough to accommodate large artifacts and the equipment necessary to transport them.
- TIP** Some storage areas include truck-loading bays within the building for loading and unloading large objects, crates, etc.
34. Unnecessary doors are eliminated from the storage area and through-traffic is restricted.
35. All cabinets and shelves containing artifacts are raised a minimum of 10 cm (4 in) off the floor to prevent water damage and to facilitate cleaning.
36. All artifacts not in cabinets or on shelves are raised off the ground using pallets or blocks.
37. Space is allowed for air circulation between furnishings and walls and ceilings in storage areas to minimize the potential for condensation.
38. The walls of storage areas are not external walls of the building.

39. Aisles in the storage areas are wide enough and have no bottlenecks or sharp corners to allow easy movement of artifacts and moving equipment.
40. Artifacts are not to be stored so high that access to them creates a risk for museum personnel or the artifact.

Pest Management

41. Museum personnel are trained to recognize signs of infestation of insects or rodents on the premises or in the collection.
 42. The museum building is inspected regularly inside and out for gaps or openings through which pests might enter and for evidence of pest entry such as carcasses, droppings and pest damage.
 43. The museum undertakes regular periodic checks for signs of infestation in all areas containing collections.
- TIP** Insect glue board traps are used to attract and collect insects, giving an early warning of potential problems.
44. All incoming material including exhibit props and plants are isolated or bagged and checked for prior to use in the museum.
 45. If infestation is found, it is dealt with under advisement from a conservation expert.
- TIP** Where this is not possible and toxic pest control substances are used, museum personnel and visitors are informed of the dangers and recommended precautions are taken.
46. All indication of past or present active infestation of an artifact and any treatment is noted on a condition report that is dated and kept in the artifact's master file.
 47. Artifacts at high risk of pest damage are physically isolated from the rest of the collection and inspected regularly.
 48. Food and beverage preparation, storage, and consumption areas are clearly designated, labelled, and located away from museum collections.
- TIP** Food and beverage preparation, storage, and consumption areas are cleaned daily with all garbage removed from the museum.

Security

49. The storage areas are isolated from the rest of the museum.

TIP To protect the museum's collection from theft while in storage, security and access is strictly controlled. For a complete overview of museum security refer to Management: Risk Management - Security.

50. Plans of the storage area layout are clearly posted.

51. Storage areas are protected by key-controlled access.

52. Visitors entering and exiting non-public areas, including storage, are tracked using log books.

53. Access to confidential information concerning collections is controlled.

54. All easily portable artifacts of high value are kept in a safe or safety deposit boxes.

TIP Climatic control agents, such as silica gel, are included as necessary.

55. An intrusion alarm system is installed for the storage area.

56. Collection storage rooms are equipped with fire extinguishers of the type approved by the institution's conservator and/or fire prevention personnel and are regularly serviced.

D. Research

As public institutions, museums 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 museum serves. The research activities undertaken by a museum are therefore an important way for the museum to demonstrate its commitment to the public and fulfill its public trust responsibilities. Research activities can be undertaken by museum staff and volunteers as well as outside researchers. Regardless of how it is conducted, research must be grounded in best practices and adhere to ethical guidelines.

General

1. The museum has a written research policy.
2. The museum has a code of ethics to guide the conduct and practice of researchers.
3. The museum supports ongoing research as an intrinsic aspect of museum work at all levels, including summative, applied and basic research.

TIP Some research may be conducted as part of the cataloguing process. Research related to artifacts can take the form of independent, scholarly or publication based research.

4. The museum is committed to creating new knowledge by conducting basic research when documenting the collection as well as when developing programs and services.
5. The museum researches and interprets significant stories and themes, in accordance with its mandate, from a range of perspectives.
6. The museum takes a multi-disciplinary approach to basic research in order to ensure the benefits of a diversity of perspectives.
7. The museum ensures that the results of internal research are made publicly accessible.
8. The museum has a written policy defining who holds copyright and the right of publication when a staff member carries out independent research, especially for publication.
9. The museum maintains a reference library and/or reference files of materials related to various aspects of museum work.

10. The museum provides place to accommodate visiting researchers in a safe, secure manner.
11. The museum gives visiting researchers physical access to artifacts at the discretion of the curator, or other designated person, and only under supervision.
12. When outside researchers are given physical access to artifacts, a record of the research's name, contact information, and the artifacts used during the research is kept.
13. The museum ensures that each artifact used by the researcher is checked and noted before the researcher leaves the premises.
14. Where a museum is housed in an historic building, research into the building's history and prior use is conducted, recorded, and noted for the public.

Oral History and Fieldwork

15. The museum has an oral history and fieldwork policy or oral history and fieldwork activities are included in the museum's research policy.

TIP Collections research can take the form of first hand or primary research that uses oral history accounts from individuals and field observations to gain information and knowledge about the collection. Knowledge of research methodology and sensitivity to issues of privacy are critical for this type of research.

16. Oral history projects are based on current principles and standards developed by professional associations and practitioners and the museum ensures that they are conducted in the spirit of critical inquiry and social responsibility.

TIP Consideration should be given to ensuring informed consent, copyright, moral rights, confidentiality and disclosure, freedom of information, defamation, data protection, and children when planning an oral history project.

17. The museum ensures that interviewees understand the nature and scope of the project; how their interview will contribute to the project as a whole, as well as, possible uses of their information in the future.
18. The museum obtains signed release forms from each oral history interviewee ensuring the museum has the rights to use the information for public purposes and strives at all times to comply with both the letter and spirit of the release form.

19. The museum ensures that the interviewee's rights to privacy, confidentiality, freedom from abuse and the ability to withdraw from the research are respected and protected.
20. The museum treats any recordings produced as part of an oral history or fieldwork project as acquisitions and they are catalogued accordingly.
21. An individual who has training and experience in conducting research within the specific discipline or field conducts the museum's oral history or fieldwork research projects.
22. The museum ensures that all members of the oral history or fieldwork project team are trained in the appropriate research methodology.
23. The museum is sensitive to the diversity of social and cultural experience and balances the needs of the interviewee with the goals of the project.

COMMUNICATIONS

In this section:

Public Programming

Marketing

Community Engagement

Social Media

Communications

The museum provides programs and services, which grow out of its mandate and fulfill its obligation to public service. Through its communications activities the museum establishes responsible, responsive, relevant, meaningful, and memorable approaches to providing information and services within the community it serves and the clients and stakeholders it represents. A museum's public image and relationship it has with its community is developed through its communications activities. The level of service a museum provides to the public and the support it receives from its community is fundamental to its success and growth.

A. Public Programming

Public programs reflect the museum's stated purpose within the institution's mission statement or incorporation documents and are expressed through a wide range of activities. Programs can take place within or outside the museum, using a variety of approaches and methods for reaching different audiences and satisfying their needs. At their best, museum programs are both educational and engaging. They involve the community in museum activities and provide opportunities to share information and create meaning.

Exhibitions are the museum's main form of communication with its audiences. Traditional exhibitions incorporate mounted objects, label copy, didactic text, and various levels of manual and electromechanical interactivity. However, with the advent of Internet technology, social media platforms, crowd sourcing, and user-based content, museums are rapidly changing the way in which they curate and deliver information and provide interpretation. Such technologies have contributed significantly to the public face of museums. Exhibitions share knowledge and the means in which information is presented. Interpretive offers must be thoughtfully planned and implemented. Exhibition themes should incorporate multiple perspectives and address the issues and interests of the community, clients and stakeholders.

School programs provide learning opportunities designed to complement the formal school curricula. School programs provide a link between the topics outlined in the curriculum and the museum's collections and exhibits.

Museum publications can take the form of scholarly books, websites, exhibition catalogues, educational programming, and promotional materials. Other types of publications may include annual reports, financial audits, and long-range planning initiatives. These publications often reflect the museum's mission and communicate valuable information to members and stakeholders beyond exhibition and curatorial interpretation.

B. Marketing

Marketing encompasses both public relations and promotional activities. The museum can promote a positive public image and awareness of its programs and services in a variety of ways.

Public relations are important aspects of public service. By providing for the comfort and convenience of visitors the museum ensures that they have a positive experience.

Membership programs offer community members and museum visitors the opportunity for a stronger connection to the museum. It is important to build an understanding of the role of the museum within the community it serves.

C. Community Engagement

Community engagement is the process whereby museums can inform, engage, and work collaboratively with people in the community in which it is part of, by sharing ideas, strategies, outcomes, and courses of action that best suit the needs of the museum and its constituents. Community engagement provides museums with the opportunity to solicit public input on new ideas, policies, and initiatives. Conversely, the community engagement process provides opportunity for community members and groups to offer informed responses, advice, or recommendations to the museum. By providing community engagement sessions museum succeed in fostering dynamic community relationships that are founded on trust, pride, empowerment, and a sense of ownership.

D. Social Media

Social media provides internet-based interactive communications between a virtually limitless number of users. Through social media, users can instantaneously share information, photos, videos, blogs, posts etc., within a global community. "Community" is key with social media, which encourages massive networking of content-sharing and collaboration. Museums have taken great advantage of social media to reach out to members, guests, and stakeholders for the promotion of initiatives, programming, fundraising, and community engagement. Additionally, many museums see the advantage of social media as an alternative platform for interpretation and curation whereby interpretive content generating is a collaboration between the museum and external users.

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General

1. The museum has a written public programming policy.
2. One or more individuals may be assigned responsibility for public programming policy.
3. The museum recognizes the pluralistic nature of society and ensures that programming policies include a commitment to reflect the cultural diversity of the community it serves.

4. The museum is sensitive to issues related to traditional knowledge, diverse belief systems, cultural experiences, and cultural appropriation, limiting access to culturally sensitive information when necessary.
5. The museum does not participate in the development of sacred sites.
6. Exhibits and programs at (or about) undeveloped sacred sites are not created or offered.
7. There is full participation of First Nations and Métis people in the planning and development of programming at the developed sacred sites.
8. Whenever possible the museum takes a collaborative approach to the development of programs and services.
9. The museum builds relationships with community groups and will choose to involve community groups in the planning, implementation, and evaluation of programs and services.
10. The museum makes a continuous effort to contact and reflect its communities' diversity in its programs and services.

TIP This includes ethnic minorities, seniors, youth, the underprivileged, and the physically and intellectually challenged.

11. The museum develops and implements programs and services that are relevant to culturally diverse visitors.
12. The museum ensures public access to its programs and services through the development, implementation and evaluation of a variety of programming options that address the needs of different audiences and learning styles.
13. The museum is familiar with the variety of technological tools available via the Internet and delivers programs and services using the tools most appropriate to achieve the goals and objectives of the program.
14. The museum ensures the integrity of program content when using social networks and public media.
15. Training is provided for paid and volunteer staff involved in public programming to ensure they present valid information about the museum's mandate and collection.

- TIP** Training includes interpretation of the collection, public relations, and the safety of people and artifacts. It also includes how to locate information about the museum and its collections, exhibits, programs, and services.
16. All paid and volunteer staff assume the responsibility for creating and maintaining good community relations and always deal with members of the public with politeness and respect.
 17. All paid and volunteer staff are open to viewpoints suggested by the collections/ exhibitions which may be different from their own and convey those viewpoints to their audiences fairly and with integrity.
 18. The museum has a written manual outlining programming activities and procedures.
 19. The museum ensures that public programming activities do not present risks to artifacts, buildings, displays, participants or museum personnel.
 20. The museum has a written annual programming schedule.

Exhibits - General

21. The museum has a written exhibition planning and development policy.

TIP The museum has an exhibition plan that includes permanent, temporary, traveling, outreach/off-site, and/or online (virtual) exhibit programs. The museum's exhibit plans should cover a minimum of 1 year and up to 5 years.

22. One or more individuals may be assigned responsibility to oversee exhibition planning, development, preparation, installation and maintenance.
23. Museum exhibits reflect the diversity within the community and are sensitive to visitors from various cultural backgrounds.
24. Museum exhibits will include various perspectives on issues and concerns relevant to the community, clients, and stakeholders they serve.
25. The museum recognizes the need to integrate tangible and intangible aspects of heritage and therefore strives to connect collections and stories in the programs and services they provide.

TIP The UNESCO *Convention for the Safeguarding of the Intangible Cultural Heritage* was adopted in 2003 and came into affect in April 2006. In short, intangible cultural heritage is living heritage, “not the songs as recorded on sound tapes or in digital form, or their transcriptions. ICH is the actual singing of the song.”²²

26. All artifacts that are not originals are labeled as replica, reproduction, duplicates, copy, etc. It should be noted that many precious artifacts are duplicates or replicas and are still considered part of the museum’s collection.
27. Exhibit information is provided using a media mix including text, photographs, charts, maps, diagrams, music, video, digital images and recordings, internet, etc. in order to address a variety of learning styles.
28. The museum ensures information in the exhibit is clearly visible by taking into consideration the height, size and placement of text.
29. Information is presented in layers to aid visitors in orientating themselves to exhibit concepts.
30. When interactive activities are provided for visitors, they have educational or interpretative value and expand on exhibit’s theme or provide information on specific artifacts.
31. The interpretative material developed around an exhibition is designed to meet the needs of audiences and is respectful in its use of language.
32. Interactive displays are maintained in good working order and do not pose safety risks to visitors, museum personnel, or artifacts.
33. The museum’s exhibit space is readily accessible to both the public and museum personnel.
34. Exhibits are arranged to allow for easy traffic flow and to avoid congestion for the safety of visitors, museum personnel, and the objects on exhibit.
35. The museum ensures that the public is made aware of rules concerning the safety of artifacts on display.
36. The museum directs visitors and maintains appropriate behaviours in public spaces through the use of prominently displayed signage where necessary.

²² UNESCO. (2012). *Convention for the Safeguarding of the Intangible Cultural Heritage*. Retrieved from www.unesco.org/culture/ich/index.php?lg=en&pg=00006

37. The museum ensures it complies with all copyright legislation when exhibiting photographs or works of art.

TIP In this case copyright information refers, primarily, to exhibition rights which give the creator of the work the right to control the use of an artistic work or be entitled to a royalty payment each time an artistic work is exhibited in public. A verbal agreement is not adequate; a written agreement between the copyright holder and the museum is necessary.

38. The museum controls or prohibits the use of photographic, video and audio recording equipment on its premises. This include the use of (or carrying of) tripods, camera bags, power packs, lighting or flash sources, lens extenders (smart phone extenders) or any other related equipment which might present a risk to museum collection safety, visitor safety, and/or copyright protection.

39. Museums will pay exhibition fees to artists for works exhibited.

TIP An exhibition fee schedule is published by CARFAC (Canadian Artist's Representation) on an annual basis. Exhibition fees are often referred to as Artist fees. Exhibition fees do not include reproduction rights.

40. The museum publicly credits institutions providing temporary exhibitions or artifacts on loan.

Exhibit - Planning and Development

41. The themes and objectives of exhibits are developed from stated goals outlined in the museum's exhibition policy and reflect the mandate of the museum. The museum should follow a standard exhibit design and planning model, which includes but not limited to, Content Development, Design Development, Final Design, Fabrication and Installation.²³ The exhibit design process may also include input from community groups, clients, and stakeholders.

TIP The planning and development stages of an exhibition are essential to ensure that the exhibit is well organized and researched. Careful planning and development ensures that the exhibit reflects the museum's mandate and the diversity of its community.

²³ National Park Service. (2012). *Exhibit Planning, Design, and Fabrication Specifications*. Harpers Ferry: Harpers Ferry Center. Pages 15-17. Retrieved from <http://www.nps.gov/hfc/acquisition/P13PC00080/Attach%20A%20-%20Consolidated%20Specs%20-%20October%202012.pdf>

42. The museum ensures that exhibitions are planned with participation of all relevant museum personnel and community members.

TIP Curators, conservators, educators, public relations, and marketing personnel, or committees fulfilling these roles, are involved early in the planning of new exhibits so that they can create associated programs and activities in their own areas of responsibility. Relevant members of the community also participate in the planning and development of exhibits.

43. The museum ensures full participation of First Nations and Métis people in the planning, development, and production of exhibitions about First Nations and Métis items and storylines.

TIP For further information contact the Saskatchewan Indian Cultural Centre in Saskatoon for help to identify resources or people when documenting the collections or planning exhibits or programs.

44. For every exhibition the museum follows an exhibition mission that includes, broad goals and objectives and clearly articulated messages to be communicated. Some exhibit missions include development schedules, budgets, artifacts, and interpretive materials that support the exhibition storyline and messages.

TIP The exhibition brief is the written record of the exhibit. It begins with the planning phase, guides the production phase and finally becomes part of the permanent record of all exhibits produced by the museum, permanent or temporary, large or small.

TIP A proposed list of artifacts developed early in the planning stage ensures that necessary preparation and conservation work can be done prior to the exhibit deadline.

45. The museum ensures that every exhibit communicates clear messages and provides information in a respectful manner.
46. The educational goals and objectives of exhibitions are clearly defined.
47. The museum undertakes formative and summative evaluation of its exhibits.
48. Language and terminology used by the museum in relation to its culturally-specific collections must be accepted by the appropriate contemporary cultural community.

49. Language and terminology used by the museum in relation to its First Nations and Métis collections must be accepted by contemporary First Nations and Métis communities.
50. The museum ensures a separate workplace is available when exhibits are produced and constructed in-house.
51. When construction is carried out in areas housing museum exhibitions, artifacts are removed until the work is completed.
52. For museums which host traveling exhibitions, there is a preparation space large enough for at least one incoming and one outgoing exhibit to be housed simultaneously.
53. The museum has an annual exhibition plan that includes permanent, temporary, traveling, outreach/off-site and/or on-line exhibits and programs.

Exhibits – Virtual

54. The museum curates online or virtual exhibitions in order to extend it reach to members, stakeholders and guest.
55. Online or virtual exhibits augment existing permanent, temporary or traveling exhibitions.
56. Online or virtual exhibits can also be exclusively online/virtual museum experiences, separate from the museum gallery programming.
57. Virtual exhibitions provide opportunities for viewers to select, engage, and interact with content of their choice.
58. Virtual exhibitions adhere the mission of the hosting museum in that they reflect the institutions commitment to preservation, interpretation, education, and public access.

TIP Virtual exhibitions follow the same exhibit planning process as permanent, temporary or traveling exhibitions.

TIP Many of the assets used in the larger exhibit can be used in the virtual exhibition.

Exhibit - Evaluation

59. Evaluation methodologies should be incorporated throughout the exhibit development process.

TIP Evaluation methodologies include but are not limited to focus group testing, surveys, risk assessments, peer review, exhibition prototyping and gallery walk-throughs.²⁴

60. Exhibition evaluations methodologies occur through every major exhibit milestone.

TIP These milestones are Content Development, Design Development, Final Design, Fabrication, and Installation.

61. Museums utilize evaluation methodologies to ensure best practices for exhibition development.

School Programs

62. The museum has a written School Programs policy.

63. Responsibility for school programs may be delegated to one or more museum staff with teaching skills and knowledge of the subject areas.

64. School programs are coordinated with the Saskatchewan curriculum and provide local content.

TIP School programs enhance student's experience by providing opportunities for self-directed learning. Programs can be provided in the museum or can take place in the classroom.

65. School programs are designed to encourage critical/historical thinking and encourage life-long learning.

TIP Benchmarks for Historical Thinking can be found at the History Education Network. Refer to the Bibliography – On-line Resources for their web address.

²⁴ Mark Walhimer. (July 10, 2012). *Museum Exhibition Design, Part VI*. Retrieved from <http://museumplanner.org/museum-exhibition-design-part-vi/>

66. School programs are based on current learning and human development theories.
67. School programs are developed in conjunction with the development of exhibit themes, messages, topic points, etc.
68. School programs are developed for specific age groups or education levels.
69. School programs incorporate the use of interpretive materials and appropriate technologies that engage students in the learning process.

TIP Appropriate technologies include but are not limited to Internet, social media, crowd sourcing, etc.

70. The museum provides teacher preparation and orientation in advance of the museum visit as well as follow-up ideas/activities to reinforce the learning experience.
71. The museum has a written school program manual that is available to teachers.
72. The museum provides a Teacher's Guide that outlines the museum's expectations of the teacher and students as well as what the teacher and students can expect from their museum visit.
73. The extension/education collection is composed of duplicate artifacts or replicas that are to be used for educational purposes.

TIP In order to protect original artifacts, when demonstrations and re-enactments are used in educational programs, models, replicas or audio-visual records are substituted for original artifacts.

TIP Some museums use original artifacts within their educational programming. Some object might be transferred from permanent collections for this purpose.

74. The museum ensures that participating teachers and students evaluate education programs.
75. The museum conducts periodic evaluations and reviews of its education programs to ensure they are meeting the goals of the museum and changing curriculum needs of the target groups.
76. A separate space is provided for education programming activities.

TIP This is in addition to providing ample opportunity for interaction with the exhibits.

77. Education programs are developed in partnership with educational institutions in the community.

TIP The educational institution may be a local school, community college, technical training institution or university.

78. The museum ensures that students and teachers acquire the skills and tools to independently use the museum's resources.

TIP This may be accomplished through the use of hands-on or interactive activities (including social media and internet resources) that engage the student in a dialogue resulting in the development of a personal perspective of the exhibit.

Publications

79. The museum has a written publications policy.

TIP Museum publications range from simple promotional brochures and event calendars to more complex publications such as exhibition catalogues, local history books, and colour reproduction of artifacts' images for slides and postcards. Many museums are also creating digital content for publication on the Internet. Publications may also include annual reports, director's messages, and audited financial statements.

80. One or more individuals may be assigned responsibility for all publication production activities.

81. The museum's publication program addresses the needs of the museum, the community it serves, clients and stakeholders.

TIP The target audience may be based on age, interests or level of education.

82. Publication projects are integrated into the institution's overall planning cycle.

TIP Publication projects may include the production of promotional material for the museum and its exhibitions as well as the publication of scholarly books.

TIP Distribution plans and budgets are part of the overall planning process as is determining the number of copies to go to the national library, the ISBN number, and catalogue information requirements.

83. The museum holds copyright to the material used in all publications. If the museum does not hold copyright it acknowledges the owner of copyright material and pays appropriate fees for use of copyright material in all publications, including those produced for the Internet.

TIP The museum needs to clearly define who holds copyright to works produced by employees. Generally, the employer holds the copyright unless a written agreement exists granting the employee copyright. Regardless, the employee is still the author of the work created which is important when determining the duration of copyright protection and with respect to moral rights.

84. Ongoing documentation of all publishing efforts is maintained by the museum.

85. Museums that regularly produce exhibition catalogues and books based on in-house research, specialized publication-personnel will maintain control the production of published work.

TIP For flexible, low cost results, producing publications in-house using desktop publishing software may be the preferred option.

TIP More information on sharing the museum's published work and licensing agreements can be found online. Refer to Bibliography – On-line Resources for addresses.

B. Marketing

Marketing encompasses both public relations and promotional activities. The museum can promote a positive public image and awareness of its programs and services in a variety of ways.

Public relations are another important aspect of public service. By providing for the comfort and convenience of visitors the museum ensures that they have a positive experience.

Membership programs offer community members and museum visitors the opportunity for a stronger connection to the museum. This is important to build an understanding of the role of the museum within the community it serves.

Promotions

1. The museum has a written marketing policy.
2. The museum plans, implements, and evaluates a coordinated marketing strategy that promotes the value of museum programs and services linking the museum to quality of life issues such as: life-long learning, community engagement, and building social capital.

TIP The marketing strategy and promotions plan includes a budget sufficient to cover the costs of paid promotions such as newspaper ads, radio announcements or television commercials. It is beneficial to the museum to use both paid and unpaid advertising. With paid advertising the museum retains more control over content and quality than is sometimes possible with unpaid advertising.

3. One or more individuals are assigned responsibility for marketing and promotional activities.
4. The museum produces material to promote the institution, its programs, exhibits, and activities.

TIP Museums often advertise through the production of souvenir material such as postcards, pins, caps, mugs, etc. Museums also advertise through radio, TV, print material, Internet, and social media.

5. The museum makes a continuous effort to develop and maintain contact with members or groups within the local community for their mutual benefit.
6. Undeveloped sacred sites are not promoted by the museum to visitors.
7. The museum is responsible for promoting respectful behaviour at developed sacred sites.

8. Mailing lists for information and promotional materials include the diverse ethnic, business, and social groups within the community.
9. For museums with First Nations and Métis collections, mailing lists for information and promotional materials include First Nations and Métis groups and organizations.
10. The museum develops a system of media releases or announcements to inform the public about the museum's welfare and events within the institution.
11. All publicity material, by or for the museum, is verified for accuracy.
12. All museum publicity material should be documented and maintained in an archive.
13. The museum uses the local media to promote its programs and services.
14. The museum reviews and evaluates the effectiveness of its publicity and public relations efforts.
15. The museum participates in community events.

TIP

To increase the visibility of the museum and build new audiences the museum hosts activities and programs presented by outside agencies. The museum may also participate in such community events as fairs, trade shows, sports events or legion activities.

TIP

Refer to Collections - Conservation - General for more specific information relating to the use of duplicate artifacts.

16. The museum establishes a visual identity or brand for the institution.

Public Relations

17. When initiating plans for the development of a museum, due consideration is given to public accessibility including the proximity to public transit, adequate parking for staff and visitors, and loading and unloading areas for buses and larger vehicles, etc.
18. Whenever possible the museum ensures that there are legible street signs prominently posted giving clear directions to the museum.

19. The museum ensures public access to all by providing services that enhance the visitors' experience.

TIP For the comfort and convenience of visitors, things such as picnic areas, play areas, food services, cloakrooms, etc. may be provided.

20. Paid and volunteer staff are trained to respond to public enquiries with politeness, respect, and attention to maintaining good public relations.

TIP Examples of general inquires include local bus access, directions to other services and attractions, and general museum information, such as opening hours and current exhibits.

21. Hours of operation are clearly posted.

22. If the museum is open only upon request, there is a reliable system in place that allows easy access to the facility by visitors.

TIP Often museums arrange with the local municipal office to assist in providing visitors with the museum's contacts.

Membership Program

23. The museum has a membership program policy.

TIP Membership programs are usually fee-based programs that offer benefits and privileges that extend beyond the usual visitor experience. Membership programs are a way to build support for the museum and extend its reach into the community.

24. One or more individuals may be assigned responsibility for the coordination of the membership program. All membership records should be stored in a secure location in accordance with privacy laws.

TIP The Membership Program includes plans for recruitment and retention of members. Membership records usually contain contact information including the mailing address, start date of membership, and track event participation activities of the member.

25. The museum ensures that the membership programs provide benefits to both the members and the institution.

TIP Often the membership is consulted for input regarding museum programs and services, as they constitute a definable, interested stakeholder group.

26. Museum members receive benefits that regular visitors do not.

27. Membership fees cover benefits members receive and are not used simply as a source of revenue for the museum.

28. Multi-level membership programs with graduated package prices and benefits are provided.

TIP Benefits often escalate from membership card/discount at the museum shop through special 'members only' events or access to an exclusive members' lounge.

29. The museum maintains regular contact with its members.

TIP An example is through newsletters and event calendars, members only sections on the museum website, etc.

C. Community Engagement

Community engagement is the process whereby museums can inform, engage, and work collaboratively with the people in the community in which it is part of, by sharing ideas, strategies, outcomes, and courses of action that best suit the needs of the museum and its constituents. Community engagement provides museums with the opportunity to solicit public input on new ideas, policies, and initiatives. Conversely, the community engagement process provides opportunity for community members and groups to offer informed responses, advice, or recommendation to the hosting museum. By providing community engagement sessions, museums succeed in fostering dynamic relationships with its community that are founded on trust, pride, empowerment, and a sense of ownership.

General

1. The museum interacts with the community to understand how it can best serve its community, members, and stakeholders.
2. The museum interacts with the community to understand how it can best solicit support from its community, members, and stakeholders.
3. Knowledge gained from community engagement informs both the museum and the community on almost every aspect of museum best practices such as heritage conservation, museum administration, collections management, interpretation, funding educational programming, and capacity development
4. Museum community engagement activities provide platforms for open and transparent discourse with the community.
5. The museum provides opportunities for community members to address and/or respond to issues in their area.
6. The museum has written policies and procedures for all community engagement activities and how communities groups are to be contacted, invited, or requested to participate in activities. Forms of public engagement include but are not limited to websites, surveys, roundtable discussions, private groups, in-person activities, and public opinion surveys.

TIP Community engagement activities should have complete support for the museum board and executive staff.

TIP Community engagement activities must reflect and/or further the requirements of the museum mission, vision, and value statements.

D. Social Media

Social media provides internet-based interactive communications between a virtually limitless number of users. Through social media, users can instantaneously share information, photos, videos, blogs, posts, etc. to a global community. Community is key with social media, which encourages massive networking of content sharing and collaboration. Museums have taken great advantage of social media to reach out to members, guests, and stakeholders for promotion of initiatives, programming, fundraising, and community engagement. Additionally, many museums see the advantage of social media as an alternative platform for interpretation and curation, whereby interpretive content generating is a collaboration between the museum and external user.

General

1. Museum utilizes social media to increase knowledge and awareness of its mission, exhibitions, and programming offers to members, stakeholders, and visitors.
2. Social media provides museums various levels of information dissemination and control.
3. Museums utilize social media to connect with visitors, members, and stakeholders and to connect with those that have never visited or are unable to visit the museum.
4. Social media platforms offer museums varying levels of information exchange and interaction with members, visitors, and stakeholders.

TIP Social media platforms used by museums include Facebook, Twitter, YouTube, Pinterest, Instagram, and others.

5. Social media allows museums to grow its membership (real and virtual) through updated informational posts.
6. Social media allows museums to express new initiatives, programs, and opportunities to dedicated followers and with accurate metrics of follower interests, likes, dislikes, and sharing of museum programs and exhibitions.
7. Museums can utilize social media to showcase artifacts, artworks, and other collections assets that are highly visual. Social media provides increase visual recognition of museum assets, allowing users the opportunity for individual curating of selected images and videos.

8. Museums utilize social media to post timed-based productions such as videos and slide-shows of varying production quality and size to feature programs, events, initiatives, collections, exhibitions, and storytelling.

Museums and Anti-Spam Legislation

Spam generally refers to unwanted internet-based communications via email, Short Messaging Service (SMS), and Multimedia Messaging Service (MMS). Spam is often characterized as commercial messaging and is usually associated with malware. Internet users often regard spam as problematic since spam messaging places a significant burden on Internet systems. Currently more than 50% of electronic communications globally consist of spam. Canada introduced anti-spam legislation (Bill C28) on July 1, 2014. This legislation "...is in place to protect Canadians while ensuring that businesses can continue to compete in the global marketplace."²⁵ Bill C28 impacts ways in which museums receive and transmit electronic communications.

9. The museum has written policies and procedures regarding Internet use, electronic communications, and anti-spam.
10. Museums must adhere to Canada's anti-spam legislation as per Bill C28.
11. Museums must have consent from a recipient prior to submitting an electronic commercial message to an electronic address. Commercial messages include commercial offering, advertising, products promoting a service or an individual that is transmitted by email, SMS, or instant messaging.
12. Museums that submit electronic messages will clearly identify the name of the submitting organization, mailing address, phone number, email address, web address, and name of a person who represents the submitting organization and who can be contacted on behalf of the electronic message.
13. Museums submitting software installation to an outside computer or mobile device must have prior express consent from the recipient.
14. Museums submitting electronic messages to an electronic address must provide a mechanism for the recipient to unsubscribe.
15. The unsubscribing mechanism must be functional for 60 days.
16. Museums cannot send messages that are false or misleading.

²⁵ Government of Canada. (2014). *Canada's Law on Spam and Other Electronic Threat*. Retrieved from www.fightspam.gc.ca/eic/site/030.nsf/eng/home

APPENDIX A: GLOSSARY

Accession – An object or set of objects acquired by a museum as part of its permanent collection. The word can be used as a verb to describe the act of processing and recording an addition to a permanent collection.

Acid Free – The term applied is to products with a neutral pH. This does not necessarily mean that the product will not become acidic overtime, unless the product is indicated to also be lignin-free.

Advocacy – Collaborative process wherein a group of people and/or a group of museums come together to identify, define, plan, and implement a plan in order to bring about a specific change in funding, community awareness, or government policy.

Agents of Deterioration – 10 primary threats to heritage environments that have been identified and described by the Canadian Conservation Institute. They are: physical forces, thieves & vandals, dissociation, fire, water, pests, pollutants, light (and ultraviolet & infrared), incorrect temperature, and incorrect relative humidity.

Bond – A form of insurance that protect your institution against potential losses cause by internal fraud, theft, or incompetence.²⁶ There are different types of bonds for different types of industries or businesses.

Buffered – The term applies to products that have an alkaline pH.

Cataloguing – The function of identifying the particular characteristics of an object or objects and of assigning it or them to one or more categories of an organized classification system, so that it and its record may be associated with other objects similar or related to it for the purposes of information retrieval.

Code of Conduct – An open disclosure of the way an organization operates providing guidelines for behavior based on the values of the organization.²⁷

Code of Ethics – A framework of personal and institutional obligations and standards that govern all members of the museum profession.

²⁶ Government of Canada. (2015). *Canada Business Network: Bonding Insurance*. Retrieved on December 9, 2015 from www.canadabusiness.ca/eng/page/3409/

²⁷ Ethics & Compliance Initiative. (May 29, 2009). *Why Have a Code of Conduct?* Retrieved on December 9, 2015 from www.ethics.org/eci/research/free-toolkit/code-of-conduct

Compensation Package – Compensation needs to take into account not only salaries, but other benefits that employees may receive including access to health and benefit plans, additional vacation time above labour standard requirements, flexible work schedules, etc. Compensation and Benefits are part of an entire package and should be presented as such.

Confidentiality – Maintaining the private nature of information or discussions.

Conflict of Interest – A situation where someone benefits personally as a result of information gained or decisions made while acting in the public trust.

Conservation – All actions aimed at the safeguarding of cultural property for the future. The purpose of conservation is to study, record, retain, and restore the culturally significant qualities of the object with the least possible intervention. Conservation includes the following: examination, documentation, preventative conservation, preservation, restoration, and reconstruction.²⁸

Continuous Learning – A process of learning that continues through one’s lifetime, based on individual needs, circumstances, interests, and learning styles.

Copyright – “The sole right to produce or reproduce a work or a substantial part of it in any form. It includes the right to perform the work or any substantial part of it or, in the case of a lecture, to deliver it. If the work is unpublished, copyright includes the right to publish the work or any substantial part of it”.²⁹ Symbol ©.

Deaccessioning – The formal process of permanently removing an object from the museum’s collection undertaken with approval of the museum’s governing authority.

Developed Site – A location of natural or historical nature that is being maintained and interpreted for the public.

Digitization – The conversion of information in any form (i.e. text, photographs, sound) to a digital format where it can be processed, stored, and shared through electronic means.

Director’s Duty of Care – A board member’s responsibility to be diligent and well informed.

²⁸ Canadian Association for the Conservation of Cultural Property. (2000). *Code of Ethics and Guidance for Practice of the Canadian Association for Conservation of Cultural Property and of the Canadian Association of Professional Conservators*. Retrieved December 7, 2015 from www.cac-accr.ca/files/pdf/ecode.pdf

²⁹ Canadian Intellectual Property Office. (2015). *A Guide to Copyright*. Retrieved on December 9, 2015 from www.cipo.ic.gc.ca/eic/site/cipolInternet-Internetopic.nsf/eng/h_wr02281.html - copyrightDefined

Director’s Duty of Diligence – A board member’s responsibility to exercise their skills and abilities in managing board business.

Director’s Duty of Loyalty – A board member’s responsibility to put the needs and interest of the organization above their own.

Director’s Duty of Obedience – A board member’s responsibility to remain faithful to the terms of the trust.

Director’s Liability Insurance – Insurance that protects board members from legal liability resulting from injuries to third parties or damage to their property.

Disposal – All artifacts that have been deaccessioned must be disposed of. If the artifact is in good condition, it should remain in the public domain and either be offered for gift, transfer, or exchange to other public collections. If no public institution can take it, the artifact may be offered for public sale. Damaged or deteriorated artifacts should be safely destroyed. Deaccessioned artifacts may not be returned to their original donor.

Fair Dealing – An exception in the *Copyright Act* where copyrighted works can be utilized without permission or payment for the purpose of research, private study, education, satire, parody, criticism, review, or news reporting.³⁰

Fiscal Management – The financial management of an institution including allocating resources through budgeting and monitoring their use and impact.

Formative Evaluation – Pre-testing that takes place during the design, planning, and implementation of a project to ensure it meets client needs.

Governing Authority – The legal entity accountable to the public and to the museum community for the policy financing and administration of the museum.

Historical Thinking – The basis of historical thinking includes concepts of significance, evidence, continuity and change, cause and consequence, perspective, and the moral dimension; these are not skills but a set of “concepts that guide and shape the practice of history.”³¹

Hold Assets in Trust – To be responsible for the ownership of property in the interest of the public.

³⁰ Simon Fraser University Library. (April 16, 2015). *What is Fair Dealing and How Does it Relate to Copyright?* Retrieved on December 9, 2015 from www.lib.sfu.ca/faqs/copyright-fair-dealing

Intangible Cultural Heritage (ICH) – “The practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artifacts, and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity.”³²

Interleaving – Putting sheets of paper between other layers of material.

Intellectual Property – The ‘tangible expression’/product resulting from intellectual pursuits such as inventions, designs, and artistic endeavours, treated as property with all the legal rights associated with ownership, use, and economic benefits to be derived from the product.

Keeping House – The primary purpose of a Keeping House is to repatriate, preserve, interpret, and exhibit Aboriginal artifacts. A Keeping House acts as a holding facility for sacred and secular artifacts being returned to their community of origin.

Light Meter – An instrument that measures radiation.

Mission Statement – Also called Statement of Purpose. This communicates the way in which the museum will serve society and its development. This fundamental policy document succinctly states the purpose and role of the museum, from which flows all the museum’s goals/objectives and policies.

Moral Rights – “Protection provided to the personality or reputation of an author/creator”.³³

Provenance – Refers to the information about the chain of ownership for an item (i.e. who owned it, when they owned it, and how they originally acquired it).

Policy – Simple statements guiding how the museum intends to conduct itself

Procedure – A description of how a policy will be carried out. It should include roles, steps, and forms / documents to use.³⁴

³¹ Seixas, Peter. (2006). *Benchmarks of Historical Thinking: A Framework for Assessment in Canada*. Retrieved December 7, 2015 from www.archive.historybenchmarks.ca/documents/benchmarks-historical-thinking-framework-assessment-canada

³² UNESCO. (nd). *Convention for the Safeguarding of the Intangible Cultural Heritage 2003*. Retrieved on December 9, 2015 from www.unesco.org/culture/ich/en/convention

Public Trust – A museum’s obligation to serve the public’s interest and to be accountable to the public in all of its activities.

Qualified Donee – A registered charity (including a registered national arts service organization); a registered Canadian amateur athletic association; a registered housing corporation resident in Canada constituted exclusively to provide low-cost housing for the aged; a registered Canadian municipality; a registered municipal or public body performing a function of government in Canada; a registered university outside Canada that is prescribed to be a university, the student body of which ordinarily includes students from Canada; a registered charitable organization outside Canada to which Her Majesty in right of Canada has made a gift; Her Majesty in right of Canada, a province, or a territory; and the United Nations and its agencies.³⁵

Qualitative – Qualitative data describes a situation by using words, ideas and stories to explain a situation. This data typically comes from the participants themselves through focus groups, interviews or conversations.³⁶

Quantitative – Quantitative Data describes a situation by using numbers. This data typically comes from questionnaires, surveys, an evaluation form or tests.³⁷

Registration – The act of documenting a collection that provides a cumulative inventory of all objects in the museum’s custody.

Re-interment – Re-burial.

Relative Humidity (RH) – “The ratio of the partial water vapour pressure to the saturation water vapour pressure at the same temperature. Can also be expressed as the ratio of the concentration of water vapour to the saturation concentration of water vapour at the same temperature. Expressed as a percentage.”³⁸

Repatriation – The return of an object to its rightful owner.

³³ Harris, L. E. (2014). *Canadian Copyright Law, 4th Ed.* Hoboken, New Jersey: Wiley & Sons, Inc.

³⁴ Victoria’s Volunteering Portal. (September 15, 2014). *What’s the Difference Between Policies and Procedure?* Retrieved on December 9, 2015 from www.volunteer.vic.gov.au/manage-your-volunteers/policies-and-procedures/whats-the-difference-between-policies-and-procedures

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³⁷ Ibid.

Sacred Sites – A location that is of ceremonial or religious importance.

Sacred/Sensitive Objects – “Anything used in ceremony; anything that a person used ” as outlined on pg. 113 of *Standards for Saskatchewan Museums – 5th Ed.*

Silica Gel – A porous, granular, and non-crystalline form of silica that is chemically inert and non-toxic. Silica Gel is used both as a drying agent, to remove moisture from the air, and as a humidity buffering agent to maintain or buffer the relative humidity at a constant level.

Statement of Purpose – Also called a Mission Statement. This communicates the way in which the museum will serve society and its development. This fundamental policy document succinctly states the purpose and role of the museum, from which flows all the museum’s goals / objectives and policies.

Statement of Significance – An assessment of historical significance explains the object or collection of objects as evidence of human activity: how they reflect values, beliefs, and ways of living and links the past with the present answering the question of why preservation and interpretation are important today.

Strategic Plan - A long-range plan that establishes the operational goals of the museum and the policies and strategies that will govern the allocation of resources.

Summative Evaluation – A process of assessing the effectiveness and quality of a completed program or exhibit by analysing participants’ reactions.

Trustee – A member of the governing authority of the museum also referred to as a board member or director.

Ultraviolet Radiation – Present in daylight and in the light from most fluorescent lamps. UV radiation can damage many types of material found in museum collections. UV radiation is measured in microwatts per lumen (μ/L).

³⁸ Canadian Conservation Institute. (2013). *Agent of Deterioration: Incorrect Relative Humidity*. Retrieved on December 9, 2015 from <http://www.canada.pch.gc.ca/eng/1444330943476>

APPENDIX B: FIRST NATIONS/MÉTIS STANDARDS

The information included in this section will provide useful tools in the museum's efforts to understand and implement the standards related to the care and interpretation of First Nations and Métis collections.

"Sensitive" Items

The term "sensitive" can be described as:

- Anything used in ceremony
- Anything that a person used that reflected the spiritual power of that person
- Items used in ceremonies
- Items found at grave sites
- Items found at sacred sites, left as offerings
- Cultural items that have ongoing historical and/or cultural importance to an Aboriginal community
- Items are sensitive when their treatment by a museum offends or arouses the sensibilities of the people who know and understand the use/history/meaning of the item.

Examples of "sensitive" items include but are not limited to:

- Medicine bundles
- Pipes and stems, associated pipe bags
- Eagle feathers and fans
- Drums (except those made for display)
- Human skeletal remains
- Items known to be grave goods
- Ceremonial bundles
- Umbilical cord packages
- Items with red ochre on them
- Moccasins with beading on the bottom
- Items known to come from a sacred site that were left as an offering at the site
- Material that was left to the elements after a Sun Dance
- Pieces of cloth or leather tied together and filled with tobacco or medicine
- Pictographs and petroglyphs in rock, and stones known to come from effigies or used for ceremonial purposes
- False Face masks
- Rattles
- Bone whistles

- Sweetgrass
- Painted tipis
- Backrest banners
- Hawk feather fans
- Staffs
- Headdresses

Note: The sensitivity and/or sacredness of items, sites, etc. are dependent upon the culture and context from which they come. Even within a particular culture the sensitivity and/or sacredness may be dependent upon an individual, a family or a group of that culture, and should be consulted. The items listed above are frequently considered sensitive and/or sacred. If a museum holds one or more of these items in its collections and has no specific information about the sensitivity and/or sacredness of these items, they should seek out help and treat these items in a sensitive and respectful manner according to the standards.

Developed Sites

A development site is a natural environment site that will:

- A. Have existing facilities
- B. Have programming
- C. Be under the authority of a registered group (examples – the provincial government, municipality, etc)

Traditional Practitioners

Traditional practitioners may be described as:

- Individuals who are recognized by the community as Elders and respected for their cultural expertise
- Individuals who practice the traditional rituals of his/her people and are knowledgeable about the use/storage of sacred items
- Respected Elders
- Pipe Holders
- Cultural Elders
- Oskapeewis/Oskhapewis; translation: an Elder who gives assistance

First Nation and Métis Resources

The following list is not exhaustive, but is meant as a guide to reliable reference books and journals. Books marked with asterisk (*) can be found in the MAS library. Where possible Internet addresses have been provided.

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APPENDIX C: REFERENCES AND RESOURCES

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APPENDIX D: MAS RESOURCES

- A. *Advocacy Guide Tools and Tips* (2010)
- B. *Building Responsive Museums: A Discussion Framework* – Produced by the Learning Coalition (2009)
- C. *Collections Documentation Manual for Saskatchewan Museums* (2014)
- D. *Evaluation Workbook: A Basic Understanding of the Program Outcome Evaluation Model* (1999)
- E. *Getting the Most out of Museums: A Teacher’s Guide to Rewarding, Stress-Free Museum Visits* (1999)
- F. *How to Train Your Summer Staff: A Practical Manual for Training Seasonal Staff for Your Museum* (1997)
- G. *Human Resource Planning Tool* (2006)
- H. *Improving Performance Through Evaluation: A Resource Guide for Museum Training Providers and Managers* (2004)
- I. *Looking Reality in the Eye: Museums and Social Responsibility* (2005)
- J. Museums & Sustainability:
 - a. *The Challenge* (2011)
 - b. *The Environment* (2012)
 - c. *Sustainable Economies* (2013)
 - d. *Sustainable Communities* (2014)
 - e. *Cultural Sustainability* (2015)
- K. *Resource Development Guide for Museums* (1992)
- L. Tip Sheets:
 - a. *Acquisition Evaluation* (2014)
 - b. *Collecting Oral Histories* (2014)
 - c. *Governance - Board Basics* (2015)
 - d. *Mission Based Collecting* (2014)
 - e. *Mission Based Exhibitions* (2015)
 - f. *Mission Based Programming* (2015)
 - g. *Oral Histories in Museum Exhibitions* (2014)
 - h. *Understanding Provenance* (2013)

APPENDIX E: ADDITIONAL RESOURCES

Canadian Provincial Museum Associations

Alberta Museums Association – www.museums.ab.ca
 Association Museums & Built Heritage New Brunswick – www.amnb.ca
 Association of Manitoba Museums – www.museumsmanitoba.com
 Association of Nova Scotia Museums – www.ansm.ns.ca
 Community Museums Association of Prince Edward Island – www.museumspei.ca
 Culture, Language, Elders and Youth Government of Yukon – www.tc.gov.yk.ca
 Government of Nunavut – www.gov.nu.ca
 Museum Association of Newfoundland and Labrador – www.manl.nf.ca
 Museums Association of British Columbia – www.museumsassn.bc.ca
 Museums Association of Saskatchewan – www.saskmuseums.org
 Northwest Territories Ministry of Education, Culture and Employment – www.ece.gov.nt.ca
 Ontario Museums Association – www.museumsontario.com
 Société des musées québécois – www.smq.qc.ca

Canadian Heritage Organizations

Canadian Conservation Institute – www.cci-icc.gc.ca
 Canadian Intellectual Property Office – www.cipo.ic.gc.ca/eic/site/cipointernet-internetopic.nsf/eng/home
 Canadian Museums Association – www.museums.ca
 Canadian Oral History Association – www.canoha.ca
 Office of the Privacy Commissioner of Canada – www.priv.gc.ca/index_e.asp
 The Intellectual Property Issues in Cultural Heritage (IPinCH) – www.sfu.ca/ipinch
 The National Trust for Canada – www.nationaltrustcanada.ca

Additional Canadian Organizations

Canada Council for the Arts – www.canadacouncil.ca
 Charity Village – www.charityvillage.com
 Cultural Human Resources – www.culturalhrc.ca

Saskatchewan Heritage Organizations

Canadian Artists Representation – Saskatchewan (CARFAC) – www.carfac.sk.ca
 Heritage Saskatchewan – www.heritagesask.ca
 Museums Association of Saskatchewan – www.saskmuseums.org
 Nature Saskatchewan – www.naturesask.ca
 Native Plant Society – www.npss.sk.ca
 Provincial Archives of Saskatchewan – www.saskarchives.com

Saskatchewan Parks, Culture, and Sport – www.tpcs.gov.sk.ca/Parks
Saskatchewan Archaeological Society – www.saskarchsoc.ca
Saskatchewan Council of Archives and Archivists – www.scaa.sk.ca
Saskatchewan Genealogical Society – www.saskgenealogy.com
Saskatchewan Heritage Foundation – www.tpcs.gov.sk.ca/SHF
Saskatchewan History and Folklore Society – www.shfs.ca
Saskatchewan Indian Cultural Centre – www.sicc.sk.ca
Saskatchewan Organization of Heritage Languages – www.heritagelanguages.sk.ca

Saskatchewan Cultural Organizations

Gabriel Dumont Institute – www.gdins.org
Heritage Saskatchewan – www.heritagesask.ca
Multicultural Council of Saskatchewan – www.mcos.ca
Organization of Saskatchewan Arts Councils – www.osac.ca
Saskatchewan Arts Alliance – www.artsalliance.sk.ca
Saskatchewan Arts Board – www.artsboard.sk.ca
Saskatchewan Indian Cultural Centre – www.sicc.sk.ca
SaskCulture – www.saskculture.ca

Additional Saskatchewan Organizations

Office of the Saskatchewan Information and Privacy Commissioner – www.oipc.sk.ca/
Saskatchewan Emergency Planners Association – www.sepa.ca
Saskatchewan Parks and Recreation Association – www.spra.sk.ca
Saskatchewan Public Legal Education Association – www.plea.org
SaskSport – www.sasksport.sk.ca
Saskatchewan Urban Municipalities Association – www.suma.org

INDEX

A

Accession register: 61
 Acid-free: 76, 107
 Material: 76
 Paper: 76
 Advocacy: 19, 28, 58, 107, 120, 121, 134
 Agents of Deterioration: 68, 107
 Alarm system: 40, 80
 Appraisal: 45, 66, 67, 126
 Acquisition: 43, 55, 57, 58, 59, 60, 64, 66, 83, 93, 131, 134
 Archaeological: 60, 62, 116, 128, 136
 Articles of Incorporation: 23, 120
 Artifact number: 60
 Assets: 24, 41, 49, 95, 105, 109
 Audit: 32, 33, 34, 41, 48, 87, 89, 98
 Authentication: 66, 67

B

Board of Directors: 9, 13, 26, 27, 33, 36
 Budget: 20, 28, 32, 34, 36, 38, 94, 98, 100, 109
 Buffered: 107
 Bylaws: 19, 23, 120

C

Catalogue file: 61
 Capacity: 21, 35, 104
 Charity: 24, 64, 111, 135
 Code of ethics: 13, 23, 81, 107, 108, 119
 Collaborations/collaborative: 19, 28, 30, 88, 90, 104, 107
 Collections documentation: 57, 58, 59, 60, 62, 134
 Committee: 9, 27, 32, 33, 47, 59, 94
 Community engagement: 88, 100, 104, 105, 133
 Condition: 25, 39, 40, 45, 60, 65, 66, 70, 71, 72, 74, 75, 76, 77, 79, 109, 128
 Condition report: 60, 66, 70, 79, 128

Confidentiality: 26, 82, 83, 108
 Contaminants: 71
 Conservation: 40, 44, 55, 59, 60, 68, 73, 74, 79, 94, 101, 104, 107, 112, 116, 119, 123, 127, 128, 129, 135
 Conservator: 23, 39, 70, 73, 80, 94, 108
 Copyright: 34, 42, 49, 50, 51, 61, 81, 82, 93, 99, 108, 109, 111, 125
 Credit: 50, 51, 93
 Curator: 82, 94, 127
 Curricula/curriculum: 87, 89, 96, 97

D

Damage: 68, 69, 71, 75, 76, 78, 79, 109, 112
 Data: 47, 62, 82, 111, 126
 Daylight: 72, 74, 112
 Deaccession: 34, 63, 64, 108, 109
 Defamation: 82
 Demonstration: 68, 75, 97
 Deterioration: 55, 68, 107, 112
 Director: 9, 13, 25, 26, 27, 33, 36, 45, 59, 98, 108, 109, 112, 120
 Disposal: 24, 47, 109, 126
 Dissolution: 24, 119
 Diversity/diverse: 11, 12, 20, 27, 28, 29, 32, 35, 37, 57, 81, 83, 89, 90, 91, 93, 101, 110, 131
 Document file: 61
 Donation: 45, 60, 67
 Due Diligence: 38
 Duty of Care: 25, 44, 108
 Duty of Diligence: 25, 109
 Duty of Loyalty: 25, 26, 109

E

Education: 13, 20, 30, 38, 68, 78, 87, 89, 92, 94, 95, 96, 97, 98, 104, 109, 121, 124, 128, 129, 130, 131, 132, 135, 136
 Emergency: 40, 41, 43, 44, 58, 73, 136
 Evaluation: 12, 29, 31, 40, 43, 58, 90, 94, 96, 97, 109, 111, 112, 129, 134
 Formative: 31, 94, 109
 Summative: 31, 81, 94, 112

- Excavation: 60
Exhibition: 20, 30, 31, 39, 50, 60, 61, 66,
71, 72, 73, 74, 75, 78, 87, 89, 91, 92,
93, 94, 95, 96, 98, 99, 105, 106, 128,
130, 131, 132, 134
Exhibition brief: 94
Exhibition rights: 61, 93
- F**
Fair dealing: 51, 109
Fire: 41, 44, 61, 78, 80, 107
Firearms: 43, 57, 70, 123, 124, 127
Firearms act: 43, 70, 123
First aid: 39, 128
First Nations: 29, 37, 59, 61, 64, 65, 70,
75, 90, 94, 95, 101, 113, 116, 117
Food: 39, 71, 75, 76, 79, 102
Freedom of Information: 82
Funerary: 65
Fundraising: 20, 32, 33, 58, 88, 105, 121,
124
- G**
Gift Shop: 33, 34
Gloves: 69
Governing Authority: 19, 20, 21, 24, 25,
26, 27, 29, 32, 35, 39, 45, 59, 63, 108,
109, 112, 120
Annual budget: 32
Audit committee: 33
- H**
Halon: 44
Halotron: 44
Hours of operation: 102
Human remains: 64, 65
Human Resource: 21, 35, 36, 122, 123, 134,
135
Heating Ventilation Air Conditioning
(HVAC): 71
- I**
Identification: 45, 60, 66, 67
- Incandescent: 72
Incorporation: 23, 47, 87, 89, 120
Infestation: 79
Insect: 79
Inspection: 40, 41, 73, 78
Insurance: 41, 43, 44, 45, 46, 63, 66, 67,
107, 109
Intangible cultural heritage: 92, 110
Intellectual property: 21, 49, 50, 52, 110,
115, 117, 125, 135
Internet: 50, 87, 88, 89, 90, 92, 97, 98,
99, 100, 105, 106, 108, 115, 125, 135
Interpretation: 87, 88, 89, 91, 95, 104,
105, 112, 113, 132
Inventory: 62, 65, 116
- J**
Job description: 35
- K**
Keeping House: 13, 58, 110
Key: 11, 20, 30, 42, 62, 80, 88, 105, 116,
123, 133
- L**
Labeling: 60
Legislation/regulations
Federal
Copyright act: 50, 109
Firearms act: 43, 70, 123
National building code: 39, 124
National fire code: 44
Provincial
Heritage property act: 40, 57,
60, 127
Arts professions act: 51, 125
Accessibility: 39, 40, 78, 101,
124
Saskatchewan uniform: 39,
40, 124
- Liability/insurance: 39, 41, 44, 45, 46, 63,
66, 67, 107, 109

Library: 81, 98, 109, 115, 119
 Light: 55, 68, 71, 72, 74, 76, 107, 110, 112
 Light intensity: 72, 74
 Light levels: 71, 72, 74
 Loans: 42, 51, 57, 58, 60, 65, 66, 68
 Lumens: 72
 Lux: 72

M

Maintenance: 40, 73, 74, 77, 91
 Management: 11, 15, 19, 20, 21, 23, 24, 25,
 26, 27, 29, 30, 31, 32, 34, 35, 36, 38,
 39, 42, 43, 47, 55, 57, 58, 60, 61, 62,
 63, 67, 68, 79, 80, 104, 109, 119, 121,
 122, 123, 124, 126
 Mandate: 19, 23, 26, 33, 34, 40, 57, 59, 81,
 87, 90, 93
 Manual: 41, 58, 59, 62, 63, 67, 74, 87, 89,
 91, 97, 119, 121, 128, 129, 130, 132, 134
 Collections handling and care: 69
 Collections management: 15, 55,
 57, 58, 60, 61, 62, 63, 67, 68, 104, 126
 Exhibits: 13, 34, 42, 50, 55, 57, 73,
 74, 75, 76, 87, 89, 90, 91, 92, 93, 94,
 95, 98, 100, 102, 131
 Identification/authentication: 45,
 60, 66, 67
 Public program: 31, 87, 89
 Security: 21, 38, 41, 42, 74, 80, 123,
 124
 Marketing: 33, 52, 88, 94, 100, 132, 133
 Master file: 60, 61, 63, 70, 76, 79
 Meetings: 25, 27, 47
 Membership: 11, 32, 47, 88, 100, 102, 103,
 105
 Métis: 29, 37, 59, 61, 64, 65, 70, 90, 94,
 95, 101, 113, 115, 117
 Microclimate: 71, 74
 Mission statement: 24, 57, 87, 89, 110, 112
 Moral rights: 51, 61, 82, 99, 110

N

Negligence: 38

Number: 9, 15, 27, 35, 40, 60, 70, 76, 88,
 98, 105, 106, 111, 121

O

Object file: 61
 Oral History: 82, 83, 129, 130, 135

P

Paleontological: 60
 Patent: 49, 50, 61
 Permanent: 13, 58, 59, 60, 63, 66, 68, 75,
 91, 94, 95, 97, 107, 108
 Pests: 71, 79, 107
 Plan: 19, 20, 23, 24, 28, 29, 30, 31, 32, 33,
 35, 36, 38, 43, 44, 52, 58, 77, 80, 82,
 87, 89, 90, 91, 93, 94, 95, 98, 100,
 101, 102, 107, 108, 109, 112, 121, 123,
 131, 132, 134, 136
 Emergency response: 43
 Human resource: 21, 35, 36, 122, 123,
 134, 135
 Long term: 76
 Resource development: 21, 33, 35,
 134
 Risk management: 21, 38, 43, 47,
 80, 123
 Strategic: 24, 112, 123, 132
 Succession: 36
 Policy: 19, 20, 24, 25, 26, 27, 28, 30, 33,
 42, 49, 50, 51, 52, 57, 58, 59, 60, 63,
 64, 65, 66, 67, 68, 69, 70, 81, 82, 89,
 91, 93, 96, 98, 100, 102, 107, 109,
 110, 112, 121, 131, 132
 Acquisition: 43, 55, 57, 58, 59, 60,
 64, 66, 83, 93, 131, 134
 Collections care: 55, 64, 68, 128
 Collections management: 15, 55,
 57, 58, 60, 61, 62, 63, 67, 68, 104, 126
 Copyright: 34, 42, 49, 50, 51, 61, 81,
 82, 93, 99, 108, 109, 111, 125
 Deaccessions: 63
 Dissolution: 24, 119

- Facility use: 69
Human resource: 21, 35, 36, 122, 123, 134, 135
Identification/authentication: 45, 60, 66, 67
Inquiries: 66, 67
Loans: 42, 51, 57, 58, 60, 65, 66, 68
Marketing: 33, 52, 88, 94, 100, 132, 133
Membership program: 88, 100, 102, 103
Oral history and fieldwork: 82
Photography: 42
Public programming: 87, 89, 90, 91, 130
Publications: 50, 87, 89, 98, 99, 115, 121, 123, 124, 127, 129, 131
Repatriation: 64, 111
Research: 9, 13, 39, 42, 44, 49, 50, 51, 55, 56, 57, 58, 60, 70, 81, 82, 83, 93, 99, 107, 109, 117, 123, 124, 126, 129, 130
Sacred/sensitive materials: 57, 69, 72, 76
Sales activities: 33, 34
School programs: 87, 89, 96, 97
Pollutants: 71, 107
Privacy: 42, 48, 63, 82, 83, 102, 124, 135, 136
Preventative: 21, 38, 78, 108, 128
Procedure: 19, 23, 30, 32, 34, 36, 37, 38, 40, 41, 42, 43, 44, 48, 49, 50, 51, 55, 57, 58, 60, 62, 63, 64, 67, 69, 70, 73, 74, 91, 104, 106, 110, 111, 128
Promotional: 87, 88, 89, 98, 100, 101
Promotional activities: 88, 100
Provenance: 57, 58, 60, 110, 134
Public Domain: 50, 109
Public liability: 44
Public Relations: 88, 91, 94, 100, 101, 102, 132, 133
Public Service: 13, 25, 87, 88, 100
Public Trust: 11, 12, 13, 19, 25, 27, 39, 55, 56, 57, 81, 108, 111, 120
Public Value: 31
Publications: 50, 87, 89, 98, 99, 115, 121, 123, 124, 127, 129, 131
Publicity: 101, 133
- Q**
Qualified Donee: 24, 64, 111, 126
Qualitative: 31, 111
Quantitative: 31, 111
- R**
Relative humidity: 55, 68, 71, 74, 107, 111, 112
Recognition: 20, 30, 33, 37, 105, 116
Recruitment: 37, 102, 123
Records: 38, 42, 47, 51, 55, 58, 61, 62, 63, 68, 97, 102, 124
Repatriation: 64, 111
Replicas: 34, 61, 68, 75, 92, 97
Reproduction: 34, 50, 51, 61, 65, 92, 93, 98
Reproduction rights: 51, 61, 93
Research: 9, 13, 39, 42, 44, 49, 50, 51, 55, 56, 57, 58, 60, 70, 81, 82, 83, 93, 99, 107, 109, 117, 123, 124, 126, 129, 130
Researchers: 42, 56, 81, 82
Review: 9, 11, 32, 33, 38, 42, 43, 51, 66, 71, 96, 97, 101, 109, 117, 123, 124, 129
Risk Management: 21, 38, 43, 47, 80, 123
Rules of Conduct: 23
- S**
Sacred: 58, 64, 65, 70, 90, 100, 110, 112, 113, 114, 116, 117
Sacred Sites: 90, 100, 112, 113, 117
Security: 21, 38, 41, 42, 74, 80, 123, 124
Self-employed: 36, 122
Sensitive: 57, 59, 64, 65, 69, 70, 71, 72, 74, 76, 83, 90, 91, 112, 113, 114
School Programs: 87, 89, 96, 97
Signage: 40, 92
Silica gel: 71, 74, 80, 112
Smoking: 75, 76
Social Media: 29, 31, 42, 87, 88, 89, 97, 98, 100, 105, 106, 130, 133

Source: 20, 32, 33, 37, 61, 74, 77, 93, 103
 Spam: 106, 133
 Stakeholders: 87, 88, 89, 91, 93, 95, 98,
 104, 105
 Standardized: 62, 76
 Standard of Care: 38
 Statement of purpose: 19, 23, 24, 30, 48,
 110, 112
 Statement of significance: 58, 112
 Strategic Plan: 24, 112, 123
 Stewardship: 25
 Storage: 21, 42, 47, 48, 55, 67, 68, 71, 72,
 75, 76, 77, 78, 79, 80, 114, 127, 129
 Storyline: 94

T

Tangible: 13, 49, 57, 91, 110
 Target audience: 98
 Tax Receipt: 67
 Temperature: 55, 68, 71, 74, 107, 111
 Temporary Deposit: 65, 67
 Textiles: 69, 72, 77
 Theme: 59, 81, 87, 89, 92, 93, 97, 127
 Trademark: 49, 51, 52, 61
 Trade Secret: 49, 52
 Traditional Knowledge: 49, 57, 90, 115, 125
 Training: 34, 35, 37, 38, 57, 69, 74, 83, 90,
 91, 98, 134
 Transfer of Ownership: 59, 127
 Treatment: 55, 60, 64, 68, 73, 79, 113
 Trustee: 13, 26, 27, 112, 120

U

UNESCO: 59, 92, 110, 127
 UV: 112
 UV filters: 72

V

Virtual: 91, 95, 105
 Volunteers: 20, 26, 29, 30, 35, 36, 37, 41,
 43, 45, 56, 81, 111

W

Workplace Hazardous Materials
 Information System (WHMIS): 39

X**Y****Z**

