

Fort Sackville Foundation Collection Management Policy

1 Introduction

1.1 Mandate

The Fort Sackville Foundation (FSF) is an incorporated society that operates the Scott Manor House. The Society's mandate is

- Collecting, preserving and interpreting photos, artifacts and stories of historical significance to Bedford
- Researching the peoples, places, organizations and events, and the built and natural environment of Bedford
- Cultivating and promoting an understanding of the heritage of Bedford, by production of monographs, exhibits, public programs, and other activities
- Maintaining and promoting Scott Manor House and the site of Fort Sackville
- Advocating for heritage preservation

1.2 Purpose of Policy

This *Collection Management Policy* provides standards and criteria for the selection, acquisition, preservation, use, and documentation of artifacts in the collection, and for deaccession and disposal if necessary. It considers past and current practice, professional and museological standards, legal and ethical obligations, collection management issues, and planning for the future. This policy helps the FSF fulfill its public trust obligations through proper stewardship of its collection in order to maintain the collection in perpetuity.

This policy provides the framework for *Procedure for Decision on Item Acquisition and Accession* (Appendix 1). Policies and procedures are reviewed by the Archives Team every five years and any amendments and/or updates are forwarded to the Board of Directors for approval.

Throughout this policy and the accompanying procedural manuals, the Fort Sackville Foundation and the Scott Manor House are referred to as “the museum”. The volunteer Archivist is referred to as “the manager”.

1.3 Responsibility for the Collection

The museum's board of directors is ultimately responsible for the collection, with the manager ensuring that collection management policies, guidelines, procedures, and standards are developed and implemented. It is the manager's responsibility to make certain that anyone who works with the collection is aware of the policies and procedures and adheres to the Canadian Museums Association's (CMA) *Ethics Guidelines* (2006). The manager is also responsible for ensuring staff and volunteers consistently follow procedures and standards as set by the Fort Sackville Foundation.

1.4 Scope of the Collection

The museum's collection consists of material relating to the Fort Sackville Foundation's mission to collect, protect, preserve and promote the history and cultural heritage of Bedford. Objects are acquired and preserved for education, research, and exhibition alongside supporting documentation. The Fort Sackville Foundation is responsible for preserving the collection and making it accessible to current and future generations. The museum's collection is comprised of a permanent collection and a working collection (see Section 5). Throughout this policy, "the collection" refers to both collections together, unless specified otherwise.

2 Acquisition

2.1 Definition

Acquisition is the formal process of obtaining legal title of an object through purchase, donation, or bequest by transferring legal ownership from the vendor or donor to the museum.

2.2 Authorization

Acquisitions are ultimately the responsibility of the manager. The manager must ensure that the Archives Team has the appropriate documentation available to make an informed recommendation to acquire or reject the potential acquisition. The Archives Team is comprised of the manager and at least 2 volunteers who work directly with the manager.

Acquisitions are approved by the Archives Team. A report on the yearly acquisitions is submitted to the Board of Directors for information at the Annual General Meeting.

If the Archives Team is unable to come to a conclusive decision on whether to acquire a specific artifact, the Board of Directors makes the final decision.

2.3 Criteria

Acquisitions to the museum's collection are made with the stewardship of the collection in mind; an object is acquired with the intention that it will permanently remain in the collection and not with the purpose of eventual disposal. Before completing an acquisition, the museum must make reasonable effort to determine that the potential donor or vendor is the legal owner. To maintain the stewardship of the collection, the museum accepts objects for acquisition with both the short- and long- term objectives of the collection in mind. Some acquisitions may be made for educational purposes as part of a working collection, but these objects may be subject to reduced levels of care and documentation (see Section 5.2). The Archives Team seeks to build on strengths and address weaknesses of the collection while adhering to the mandate of the organization. This is accomplished by complying with the following criteria:

- Relevance to the museum’s mission statement (*To collect, protect, preserve, and promote the history and cultural heritage of Bedford*) or mandate
- Significance (i.e., association with a person, event, geographical area, or historical period)
- Oral or written documentation to support ownership, authenticity, study, and use
- Compliance with applicable legislation (e.g., Firearms Act)
- Compliance with the CMA’s *Ethics Guidelines* (2006)
- Availability of human and financial resources to acquire, document, preserve, store, and exhibit the artifact in existing facilities
- Opportunities for use, exhibition, research, and other program requirements
- Physical condition
- Cultural sensitivity
- Absence of threats to users or to other elements of the collection
- Consideration of restrictions on use or disposal

2.4 Methods

2.4.1 Gift

A gift involves an object’s legal title being voluntarily transferred to the museum by a donor. Archives Team members must not deliberate over potential artifacts with which they have a direct connection. A completed *Donor Agreement and Questionnaire* (Appendix 5) is the legal documentation of acquisition and must be kept with the object’s file.

2.4.2 Bequest

A bequest involves an object’s legal title being transferred to the museum by a donor as part of a legal Will. For a donor to bequeath a potential artifact to the museum, (s)he must include the intention in a legal Will. After Probate has been completed, the museum is able to claim an object. The museum is not obligated to accept bequeathed objects; the Archives Team may reject the offer. The relevant portion of the Will is the legal documentation of acquisition and must be kept with the object’s file.

2.4.3 Purchase

A purchase involves an object’s legal title being transferred to the museum from a vendor in exchange for an agreed price. The purchase of objects from staff members, volunteers, or board members is subject to approval from the Board of Directors. The bill of sale is the legal documentation of acquisition and must be kept with the object’s file. Purchases must comply with the CMA’s *Ethics Guidelines*.

2.4.4 Field Collecting

Field collecting is the practice of actively gathering field specimens, natural or cultural, from their native environment for inclusion in the museum’s collection. Gaining legal title requires proper permits or licences for collecting

specific materials. These documents are the legal documentation of acquisition and must be kept with the object's file.

2.5 Ethical Guidelines

When making an acquisition, the museum will comply with the ethical codes prescribed in the *CMA's Ethics Guidelines* (2006) that regulate the museum profession. Specifically, these guidelines pertain primarily to the museum's public trust responsibilities and potential conflicts of interest between the museum and its trustees.

- The museum will only acquire material that it can properly document, preserve, and exhibit.
- In any case where a conflict of interest develops between the needs of the museum and an individual trustee or staff member, the interests of the museum will prevail. This includes any personal collecting by museum trustees.
- The museum will not deliberately or misleadingly identify or value an object to the benefit of the museum and the detriment of the donor in order to acquire it for the museum's collection.
- The museum will guard against directly or indirectly participating in the illegal traffic of cultural or natural objects. This may include objects that have been stolen, illegally imported/exported, or illegally collected in the field.
- The museum and its trustees will not participate in the dealing (buying or selling for profit) of any objects similar or related to the objects collected by the museum for use in its collection.

2.6 Collection Types

Objects are acquired for different purposes within the museum. They are either added to the working collection or accessioned into the permanent collection. The working collection contains acquisitions that are useful solely for information research, for hands-on educational purposes, or as props or auxiliary items in displays. Only permanent collection acquisitions are accessioned. All acquisitions are appropriately tagged and documented prior to inclusion in one of the collections (see Appendix 3 – *Procedure for Documentation of Acquired Artifacts and Archival Material*).

3 Documentation and Records Management

Proper records management is central to any effectively maintained collection. The museum's documentation promotes the purposes of the collection and conforms to professional standards. Documentation is initiated on objects in a timely manner.

The documentation generated is a permanent, official record for each artifact in the collection.

- An artifact's file includes documentation proving the museum's legal title.

- An artifact's file includes documentation discussing the artifact's provenance, description, and narrative as it relates to the museum's mandate.
- The collection documentation, including photographs, is backed up once a week. Backup files are kept both on- and off-site.

Documentation is the responsibility of the manager who works with museum staff and volunteers to complete records as required. Information regarding acquisitions, loans, or disposals is accessible in the manager's annual report to the Board of Directors in accordance with privacy laws.

4 Care and Preservation

Care and Preservation is the effect of all actions performed to maintain and stabilize the condition of artifacts in the collection in order to pass them along to future generations. It can include conservation treatments and preventive conservation, as well as any action that has direct effects on the physical well-being of the collection, such as safe and proper storage, handling, and exhibition techniques (Nova Scotia Museum).

- The museum recognizes that its collection is held in the public trust. As such, the manager ensures that staff and volunteers who have physical access to the collection are trained in, and use, appropriate care and handling.
- Staff and volunteers strive to maintain artifacts and collection records in an environment conducive to preservation. The manager ensures that the collection is inspected on a regular basis and *Condition Reports* (Appendix 6) are completed as needed. Any staff member or volunteer who discovers a preservation problem or damage to an artifact must document and report it immediately to the archivist and curator.
- Staff and volunteers are responsible for maintaining the security of the collection, immediately documenting (*Incident Report for Collection and Property*, Appendix 7) and reporting any confirmed loss or breach of security to the manager who reports it to the Board of Directors.
- The manager ensures that artifacts having the potential to be hazardous to the public, museum staff, volunteers, the environment, or the collection are properly handled and stored. All safety regulations (e.g., OHS, WHMIS) must be followed.
- In the event of an emergency, the museum's *Disaster Plan* is put into practice. Copies are kept both on- and off-site with the designated board member and/or volunteer. Information is updated as required, and the *Disaster Plan* is reviewed every five years.

5 Access and Use

5.1 Permanent Collection

- The museum maintains a balanced approach between the preservation of the collection and making it accessible to the public. Access to the collection is provided through exhibitions, programs, events, publications, collection records, research files, and consultation with the curator and archivist.

- The level of staff access to the collection is determined by the manager. All staff and volunteers who handle artifacts must be appropriately trained and supervised.
- The museum allows limited access to the collection by the public. Access to, and use of, the collection is at the discretion of the manager, and is generally provided to any persons demonstrating a need.
- The *Research Policy* outlines information regarding researchers' access and use of the collection.

5.2 Working Collection

Artifacts used in educational programming may be part of a working collection, allowing them to be handled or operated by staff, volunteers or the public. Being part of the working collection may result in a reduced level of care, documentation, conservation, and restoration.

- Artifacts may be acquired specifically for use within the working collection or transferred from the permanent collection after being deaccessioned. The decision to transfer an artifact is determined by the manager but must gain final approval from the Archives Team.
- The rationale for transferring an artifact from the permanent collection must be clearly documented. All artifacts acquired for use in the working collection must be registered and catalogued in accordance with museum standards. All artifacts within the working collection must be clearly labelled as such.
- Artifacts in the working collection must fulfil an appropriate program need, be expendable (e.g. a duplicate, overrepresented in the permanent collection), be safe to use, and not contravene legislation (e.g. firearms).
- If an artifact in the working collection becomes no longer useful or needed, it may be disposed according to the process outlined in section 9. The artifact's documentation is amended to reflect the disposal.

6 Loans

Loans are artifacts temporarily released from the museum's collection to another organization, or temporarily borrowed by the museum from an organization or individual. There is no change of ownership between the museum and other institutions or individuals (Alberta Museums Association).

6.1 Loans into the museum

The museum may borrow artifacts from institutions and individuals for exhibitions, study, or other purposes consistent with the mandate of the museum's mission.

- Before completing a loan, the museum must make every effort to ensure the lender has the authority to loan out the artifact. An *Incoming Loan Agreement* (Appendix 8) form or *Temporary Receipt for Item Research* (Appendix 9) form must also be completed between the museum and the lender. This documentation is kept in the museum's files.

- The museum provides the same level of care and security for artifacts on loan to the museum as it does for those in its own, permanent collection. Treatments are not completed on the borrowed artifacts without prior written consent from the lender.
- When the museum borrows artifacts from institutions, it follows the procedures prescribed by the lending institution. When the museum borrows artifacts from an individual, or institution without lending procedures, it follows the procedures of the museum.
- The museum does not maintain permanent loans. Unless renewed, a loan remains with the museum for a maximum of one year.

6.2 Loans out of the museum

The museum may lend artifacts to other institutions, but not normally to individuals. The purpose of the loan must be consistent with the interests of the museum, and not pose any undue risks to the artifacts being lent.

- Before completing a loan, the museum must ensure that any borrowing institutions are able to provide care in keeping with its standards. An *Outgoing Loan Agreement* (Appendix 10) form must be completed between the museum and the borrower. This documentation will be kept in the museum's files.
- Outgoing loans may be covered by either the museum's own insurance policy or insurance taken out by the borrower. This will be determined on a case-by-case basis when completing the *Outgoing Loan Agreement*.
- Unless renewed, a loan remains with the borrowing institution for a maximum period of one year.
- The museum reserves the right not to lend artifacts.

7 Insurance

The Fort Sackville Foundation has Director insurance only.

8 Deaccession

8.1 Definition

Deaccessioning is the formal process of permanently removing an accessioned artifact from the museum's collection, collection register, catalogue, and/or database (Alberta Museum Association).

8.2 Authorization

The deaccessioning of artifacts is dealt with on a case-by-case manner, recommended by the manager on behalf of the Archives Team, and requires the subsequent approval of the Board of Directors.

8.3 Criteria

The museum considers stewardship of its collection to be a critical responsibility, a duty which is reinforced by the public trust placed in the institution. Artifacts which

are accepted into the collection are done so with the intention that they will remain in the museum. There are, however, occasions which require that artifacts be removed permanently from the collection. The following list outlines acceptable circumstances for deaccessioning an artifact.

- An artifact does not comply with the museum's mission statement.
- An artifact has been reclaimed by its legal owner (upon providing appropriate documentation).
- An artifact has been requested for repatriation by a First Nations group or other community group.
- An artifact has deteriorated beyond repair or the costs of conservation outweigh the value to the collection.
- The museum can no longer meet the necessary preservation or storage requirements for an artifact.
- An artifact is hazardous either to museum personnel and the general public or to the condition of other artifacts.
- An artifact will be better utilized in another institution's collection.
- An artifact is a duplicate, fake, or forgery.
- An artifact has a fraudulent, illegal, or unethical provenance.
- An artifact has been stolen, lost, or destroyed.

8.4 Restrictions

- The museum must have legal title to the artifact or, in the case of poorly or undocumented material, be able to demonstrate that it has made a serious, diligent, and documented investigation to determine ownership.
- Preconditions imposed on gifts or bequests may prevent an artifact from being deaccessioned.
- All deaccessions must comply with the CMA's *Ethics Guidelines*.
- All deaccessions must comply with any legal and legislative restrictions on the artifact (e.g., certified as being of national importance under the Cultural Property Review Board).
- An artifact will not be deaccessioned at the request of a donor or seller.

8.5 Process

The decision to deaccession an artifact requires careful consideration and planning. The process to deaccession an artifact must be clear and transparent. Further, clear documentation of deaccessioning and subsequent disposal is paramount. The following outlines the process for deaccession:

- The manager, in conjunction with the Archives Team, completes a *Condition Report* (Appendix 6), including photographs. If the artifact was stolen, lost, or damaged, an *Incident Report for Collection or Property* (Appendix 7) is completed.

- The manager, in conjunction with the Archives Team, completes a *Deaccession Proposal* form (Appendix 11).
- All relevant artifact documentation must accompany the *Deaccession Proposal* and be submitted to the Board of Directors.
- The Board of Directors reviews the proposal and accompanying documentation and either approves or rejects the proposal.
- If deaccession is approved, the manager adjusts all written and electronic records to reflect the deaccession and completes the *Deaccession Checklist* (Appendix 12).
- All procedural documentation is maintained in the artifact's file.

9 Disposal

9.1 Definition

Disposal is the physical removal of an object from the museum by the process decided upon by the Board of Directors, following deaccessioning.

9.2 Criteria for Disposal

- The museum must have legal title to the object and be free from obligations requiring the object's continued existence.
- The museum must not expect that the object will be requested for return or repatriation in the future.
- Deaccessioning for registered charities should follow Canada Revenue Agency's guidelines.
- Deaccessioned culturally sensitive objects are not offered to other museums. The museum must contact the appropriate community for assistance.

9.3 Methods and Process

As per the CMA's *Ethics Guidelines*, it is preferable that an object remain in the public domain. Objects with a regional or provincial importance should remain in their relevant locale. Thus, the museum must examine opportunities to transfer, exchange, or sell the object to other museums prior to private individuals or commercial entities. A public institution that expresses interest in receiving the object should demonstrate the ability to provide appropriate care and public access.

As a courtesy, the museum makes reasonable effort to notify relevant donors about disposals.

9.3.1 Donation

The museum transfers legal title of an object to another public institution through the Institution's donor agreement. The museum provides copies of any relevant documentation to the institution and keeps a copy of the donor agreement in the artifact's file.

9.3.2 Sale

If there is no public institution willing to accept a deaccessioned object, it can be offered for public sale through public auction. The museum must give public notice through the appropriate media 3 months in advance of the sale. As a courtesy, the museum offers living artists the first right to refuse re-acquisition of their earlier works through sale at a fair market price following an appraisal. Sales must comply with the CMA's *Ethics Guidelines*. Funds obtained from the sale of a deaccessioned object are allocated towards collection costs, either acquisitions or for services directly related to collection care. Funds are not allocated to operating or capital costs. The museum recognizes and credits donors when funds obtained from the disposal sale of their original gift are used to acquire new objects. Documentation regarding the sale is maintained in the artifact's file.

9.3.3 Destruction

An object which is in such poor physical condition that it cannot be restored or conserved and is no longer useful for study or teaching purposes in a working collection may be destroyed, as may an object which is hazardous to the staff, public, or collection. Destruction must take place before two witnesses such that reconstitution is impossible and in accordance with health and safety procedures mandated by the museum and the province (e.g. OHS, WHMIS). Documentation regarding the destruction is maintained in the artifact's file.

9.3.4 Return to legal owner

An artifact can only be returned to a donor if the museum does not have legal title to it and there is compliance with all relevant Canada Revenue Agency guidelines. An individual wishing to reclaim an artifact must provide documentation proving legal title. The museum and legal owner must sign a receipt indicating that the artifact has been returned to the owner, with each party receiving a copy. The museum's copy is maintained in the artifact's file.

9.3.5 Repatriation

Repatriation may be defined as "recognizing people's stake in their heritage, which in practice can mean such things as negotiated return of objects and related cultural materials, and/or sharing authority and responsibility for care and interpretation of collections in the museum" (Royal Saskatchewan Museum). The museum may repatriate objects in accordance with the principles and guidelines stated in the Canadian Museums Association's *Ethics Guidelines*, and in the Canadian Archaeological Association's *Statement for Ethical Conduct Pertaining to Aboriginal Peoples*. All requests for repatriation are dealt with on a case-by-case basis and are approached with respect and sensitivity. Documentation regarding the repatriation is maintained in the artifact's file.

Sources: Association of Nova Scotia Museum – Resources



Procedure for Decision on Item Acquisition and Accession

New item is donated

1. Information is collected for an **acquisition** decision by completing the *Item Acquisition and Accession Decision Form*, including donor information if not provided with the item.
2. Archives Team decides whether to **acquire** the item, based on information collected in the form.
 - a. If the item is **acquired**, the Archives team decides whether to **accession** the item for the permanent collection.
 - i. If the item is **approved for accessioning**, an accession number is assigned.
 - ii. If the item is **not approved for accessioning**, the reasons why accessioning is not recommended are documented on the form. Some items may better fit a working collection or may have value as informational resources, but not as artifacts or archival material. These items are usually used for displays or stored for potential research.
 - iii. The Archivist signs and dates the form.
 - iv. The item is formally documented (photograph, description, etc., entered in the database; refer to *Procedure for Documentation of Acquired Artifacts and Archival Material*). The form is filed.
 - v. The item, or the part of it that has been acquired, is placed in an appropriate storage area. The rest of the item, if any, is disposed (see below).
 - b. If the item is **not acquired**:
 - i. The reasons why the item is not acquired, and the method of disposal, are documented on the form.
 - ii. The Archivist signs and dates the form.
 - iii. The item is disposed (see below).
3. A note of thanks is sent to the donor, by completing the *Donor Thank You Letter* form.

Disposal of unacquired or unaccessioned items

1. If the donor has requested the item be returned, due diligence is done to contact the owner and return the item.
2. If the donor has not requested the item be returned, or if no donor can be determined, a photograph of the item is filed with the form and:
 - a. Consideration is given to donating the item to other archives or institutions.
 - b. The item may be offered to the public.
 - c. The item may be disposed in the garbage.



ITEM ACQUISITION AND ACCESSION DECISION FORM

Date Received: _____ Accession #: _____

Received from: _____

Address: _____

Telephone & Email: _____

Type of Acquisition: Gift Bequest Purchase Transfer Exchange

Number/Nature of Items (note any damage):

Provenance:

Primary Considerations:

Yes No

- Does the item fit within the Fort Sackville Foundation (FSF) mission statement and collection mandate?
- Does the vendor or donor have clear title to the item?
- Is the FSF able to legally acquire the item? (consider if there is legislation that may prohibit it, or if a firearm licence is required, or if, for fossils and archaeological material, the item is covered under the Special Places Protection Act)
- Is the FSF's possession of the item ethical? (consider cultural sensitivity)
- Are resources available for management and care of the item?

Secondary Considerations:

Yes No

- Is this the only example of such items at the Scott Manor House?
- Can the Scott Manor House provide adequate public access to the item?

Notes and Decision:

FSF Archivist: _____

Signature

Date



Procedure for Documentation of Acquired Artifacts and Archival Material

Numerical Identifier

- A unique numerical identifier, that has never previously been used in either the permanent or working collection, is assigned to each separate item. In the permanent collection, it is an accession number. In the working collection, it is a catalogue number.
- Multiple items may be grouped under one number only if the items are identical or if the items are components, none of which would be a complete artifact on its own (e.g. a teapot and lid).
- The format for the number is yyyy.###.##, where yyyy is the year the item is accessioned, ### is the lot number, and ## is the item number. Leading zeros are not included in the lot and item numbers. The lot number is the next available number in the sequence for that year; lot numbers start at 1 again each year. A lot is a group of one or more items, usually very few, that are related to each other, usually donated together, and likely would be kept together for displays. It is not a group of disparate items that are donated at the same time. In most cases, there will be only one item in the lot. Each item within a lot is given a consecutive item number, starting again at 1 for a new lot. Examples of groups of items given the same lot number and different item numbers are:
 - A pair of photographs, framed similarly, of different views of the same subject.
 - A scrapbook containing multiple items; if the scrapbook itself is an artifact, it is assigned item number 1.
 - A collection of coins.
 - A collection of newspapers or magazines, all with the same title, but different dates. Each differently dated whole newspaper/magazine is given a separate item number.
 - A set of dishes of the same pattern. All identical dinner plates are given the same item number; all identical saucers are given the same item number, but different from the dinner plates, etc.

Tags

- Identification tags consist of thick paper, about 1-3/4" x 1-1/4", with a hole at one end and a string tied in a loop through the hole. They can be obtained from an office supply store in packages. The use of stickers as tags is not recommended; they can leave a residue on the item and the adhesive can dry and allow the sticker to fall off.
- The numerical identifier is written on one side of the tag. If the item is in the working collection, then Working Collection is written on the same side as the numerical identifier. The item name or a very short description is written on the other side. The name or description is included in case the tag is separated from the item.
- An identification tag is affixed to each item in a lot. If the components of an item could easily be separated, a tag is affixed to each component.
- The tag should be attached securely, but without causing any damage to the item. Using tape is not advisable unless it will never leave a residue on the item. Placement of the tag, so as not to obscure the item when it is being displayed, should be considered.

- For an item that is predominantly paper, such as a map, unmounted photograph, or book, the numerical identifier (and Working Collection, if appropriate) may be written, in pencil, on the back (map or photo) or the flyleaf (book), being consistent with the placement of the number on multiple items (e.g. top right corner).

Database record

- Information about the item, including photographs, is entered into the online CollectiveAccess database, managed by the Association of Nova Scotia Museums (ANSM). A username and password are required to access the database by Scott Manor House personnel. Additional privileges for creating and deleting records may be requested for the username.
- Refer to the ANSM document “CollectiveAccess Manual”, found on the ANSM website, for instruction on how to use the CollectiveAccess database.
- For the storage location field in the database, permanent collection items are assigned storage locations under “Scott Manor House”. Working collection items are assigned storage locations under “Working Collection”.
- Any paper documentation relevant to the item is scanned and loaded into the CollectiveAccess database.

Photography

- Refer to the ANSM documents “Artefact Photography Tips” and “Photography Kit Equipment Manual”, found on the ANSM website, for guidelines on photographing items. The Canadian Conservation Institute publication “Lighting Methods for Photographing Museum Object”, purchased by the Fort Sackville Foundation, can also be very helpful.
- The photographic equipment consists of a digital camera on a tripod, two studio lights on stands, a background suspension bar held up by two tripods (tripods on loan) and background fabrics in white, grey, and black. Additionally, there is another tripod and a flash which may be set up.
- Remove the identification tag from the item before photographing. A temporary photograph of the item with the tag may be taken so that the subsequent photographs may be associated with the correct item when processing later.
- Position the item and scale well in front of the background fabric and take photographs of different sides of the item and close-ups of any interesting marks or features. Refer to the documents listed above for more detailed instructions.
- Photographic processing is done after the photography of all items for the day is completed. Adobe Photoshop Elements is a good software program to use. The processing order is usually: straighten, crop, adjust lighting and colour, and remove blemishes (e.g. creases or lint on the background fabric). Save the image using the numerical identifier, replacing the dots with underscores. For example, the photograph of a chair with number 1990.3.5 would be saved as 1990_3_5.jpg or 1990_3_5_front.jpg. Additional views or media files follow this same format with a qualifying term at the end, such as 1990_3_5_side.jpg or 1990_3_5_label.jpg.
- Attach the tag to the item, using the guidelines mentioned previously, and place the item in its designated storage location.

Thank You Letter Template



15 Fort Sackville Rd.
Bedford, N.S. B4A 2G6
(902) 832-2336

[Date]

[Name & Address of Donor]

Dear **[Name of donor]**,

Thank you for your donation of **[artifact name(s), or brief description of theme for large donations]**, received on **[date]**. The Fort Sackville Foundation relies on public support like yours to help us serve our mission to collect, protect, preserve and promote the history and cultural heritage of Bedford.

Thank you for your continuing support of the Fort Sackville Foundation.

With kind regards,

[Signature]

Archivist



15 Fort Sackville Rd.
Bedford, N.S. B4A 2G6
(902) 832-2336

DONOR AGREEMENT AND QUESTIONNAIRE

This is to certify that I, the **legal owner** of the item(s) listed below, do hereby confirm the unconditional gift and **transfer of full title** and all privileges of ownership, including associated copyright, of the item(s) to the Fort Sackville Foundation (FSF). I understand and agree that they may be displayed, stored, loaned or used in such a manner as the FSF authorities may deem to be in the best interests of the FSF.

Date _____ Signature _____

Name (please print) _____

Address _____

Telephone _____ Email _____

Receiving for the FSF _____

(Name)

(Signature)

If the FSF decides not to acquire one or more of these items for its collection, they should be:

Returned to me

Item returned: _____	_____	_____
(Date)	(Donor signature)	(FSF representative)

OR

Disposed of as the FSF sees fit

Brief description of item(s) received (number each item if more than one; please note any damage):

QUESTIONNAIRE

Please answer all questions with as much information as you can. If you are donating more than one item, please reference the item numbers in your answers, as indicated above. This information is very important in helping us to determine if the items fit our mandate and, if so, to fully document the items for use in our interpretive programs and exhibits. Our mandate is to collect, preserve, and interpret artifacts, archival material and intangible forms of Bedford's heritage. If you think of additional information later, please contact us.

What is the item's connection to Bedford? Please elaborate; this is an important question.

How old is the item?

How long have you owned it?

Where, how, and from whom did you acquire the item?

Are there any documents (photographs, letters, bill of sale, newspaper articles, etc.) related to the item that you would like to include in the donation, or would allow the museum to copy?

If the item is a photograph or painting, please describe the subject of the image, identifying any people, places, dates, etc.

Were there any previous owners? (note additional owners' info in Additional comments at the end)

Relationship to you: _____ Name: _____

Where Lived: _____ Occupation: _____

Additional information:

If the item is handmade, who made it, when and where was it made, and what materials is it made of?

Did you perform any repairs or make any changes to the item while it was in your care?

If yes, explain:

How was the item used and who used it?

Where and when was the item used?

Do you have any personal memories or stories about the item that you would like the museum to know?

Make any additional comments on the back.



CONDITION REPORT

Accession #: _____

Item description: _____

Number of items: _____ List of parts: _____

Materials: _____

Storage location: _____ Method of storage: _____

Refer to accompanying sheet for a list of conditions to assess. Indicate if a photograph was taken.

Date	Examiner	Describe change in condition from previous assessment, or indicate "no change"
------	----------	--

Date	Examiner	Describe recommendation, if any, to help preserve the item
------	----------	--



INCIDENT REPORT FOR COLLECTION OR PROPERTY

Use this form to report any property theft, loss, or damage to the Fort Sackville Foundation (FSF) collection or property. Reports should be made within 24 hours of knowledge. Condition reports for individual objects should be filled out separately. Report significant personal injury or illness separately.

Type: Theft / Loss Damage Other: _____

Description of theft, loss, or damage

Specific object, building, or site affected (*e.g. front window or Acc.# 1994.2.4 painting*):

Date and time of incident: _____ estimate unknown

Value of lost or damaged object(s): _____ estimate unknown

Location where incident occurred or began:

Activity being performed, if applicable (*e.g. guiding tours, painting ceiling*):

Equipment, materials, and chemicals in use, if applicable (*e.g. ladder, paint can*):

How theft, loss, or damage occurred, if known. Describe sequence of events, specifying object or activity which directly produced theft, loss, or damage. Use separate sheet if necessary.

unknown

Resulting health and safety hazards: serious minor none unknown

Resulting security concerns: serious minor none unknown

Person/People Responsible

none unknown

Name: _____

Address: _____

Phone: _____ Email: _____

Description:

Victim or Owner (if other than Fort Sackville Foundation)

Name: _____

Address: _____

Phone: _____ Email: _____

Witness

none unknown

Name: _____

Address: _____

Phone: _____ Email: _____

Staff Response

Action Taken:

Report made by:

Name: _____

Date: _____



INCOMING LOAN AGREEMENT

This is to certify that I, _____, have loaned the item(s) listed below to the Fort Sackville Foundation (FSF). I understand that:

- The FSF will make every effort to ensure the care and safety of the item(s) while under its care.
- The FSF may photograph or otherwise reproduce in any way the item(s) on loan for record or other non-commercial purposes, in compliance with applicable intellectual property laws.
- Item(s) will be returned to me or my duly authorized agent at the end of the loan period by presentation of this agreement. The FSF will notify me by phone, email or letter mail. Written request and presentation of this agreement can be made for an earlier return.
- I have 30 days from the end of the loan period to retrieve the item(s) from the FSF.
- If the item(s) is/are not retrieved within 30 days of the loan period ending, the FSF reserves the right to charge storage fees for the item(s). After 60 days from the end of the loan period, any unretrieved item(s) will be considered an unconditional gift to the FSF, and the FSF may dispose of the item(s) as it sees fit.
- It is the lender’s responsibility to notify the FSF of any change in address or contact information as provided below.

Duration of loan (one year maximum, renewable):

Purpose of loan:

Item description(s) (note any damage):

Special conditions:

Date: _____ Name of lender: _____

Address: _____

Telephone: _____ Email: _____

Signature of lender: _____

Fort Sackville Foundation representative: _____

Return: I acknowledge the return of the above in satisfactory condition

Date: _____ Signature of lender: _____

Fort Sackville Foundation representative: _____

Original – Scott Manor House Duplicate – Lender



TEMPORARY RECEIPT FOR ITEM RESEARCH

This is to record that I have brought to the Fort Sackville Foundation (FSF) the item(s) listed below for the following reason:

Identification Study/Examination Other _____

Description of Items (note any damage):

- The FSF will make every effort to ensure the care and safety of the item(s) while under its care.
- The FSF agrees to notify the owner, for the purpose of returning the item(s), within 60 days of the signing date below. Notice will be given by phone, email or, if necessary, by letter mail.
- The owner has 60 days from the date of notification to reclaim the item(s) from the FSF.
- If the item(s) is not reclaimed within the 60-day time frame, the item(s) will be considered an unconditional gift to the FSF, and the FSF may dispose of the item(s) as it sees fit.
- It is the owner’s responsibility to notify the FSF of any change in address or contact information as provided below.

Date _____ Signature _____

Name (please print) _____

Address _____

Telephone _____ Email _____

FSF Representative _____

Return:

Date of return notification _____ FSF Representative _____

I acknowledge the return of the above in satisfactory condition

Date _____ Signature _____

(Owner or Agent)

FSF Representative _____



OUTGOING LOAN AGREEMENT

This is to certify that I, _____, as a representative of _____ **[Name of Museum/Organization]** have borrowed the item(s) listed below from the Fort Sackville Foundation (FSF), subject to these conditions:

1. The FSF must be acknowledged in exhibits, publications or other media; the FSF retains any copyrights.
2. Borrowed item(s) must be returned promptly at the end of the loan period.
3. All reasonable precautions must be used for the safety and preservation of the item(s) listed.
4. It is the borrower's responsibility to notify the FSF of any change in address or contact information as provided below.

Duration of loan (one year maximum, renewable):

Purpose of loan:

Accession number and item name (note any damage):

Special conditions:

Date: _____ Name of borrower: _____

Address: _____

Telephone: _____ Email: _____

Signature of borrower: _____

Fort Sackville Foundation Archivist: _____

Return: I acknowledge the return of the above in satisfactory condition

Date: _____ Signature of borrower: _____

Received by the FSF Archivist: _____

Original – Fort Sackville Foundation Duplicate – Borrower



DEACCESSION PROPOSAL

Accession Number: _____

Object Name and Description: _____

Date Acquired: _____

Acquired From: _____

Acquisition Mode (gift, bequest, purchase, transfer, etc): _____

Indicate if the museum holds clear title to this object and how this is documented:

List any restrictions on the original transaction that would affect deaccessioning or disposal:

Deaccession Reason:

- No longer relevant to mission statement
- Return to rightful owner
- Repatriation request
- Deteriorated beyond repair
- Hazardous to health of museum personnel and general public
- Hazardous to condition of other objects
- Museum is unable to meet necessary preservation requirements
- Better utilized at another institution
- Duplicate
- Fraud/fake
- Stolen
- Lost
- Destroyed
- Other, explain (use reverse if required):

Artworks:

Yes No

- Is the artist still alive?
- Has the artist been contacted?

Results of contact:

Gifts:

No obligation, but the Museum may contact the donor as a courtesy.

Yes No

- Is the donor still alive?
- Has the donor been contacted?

Results of contact:

Purchases:

Purchase price: _____

Current market value: _____

How market value was determined: _____

Name of appraiser(s): _____

Reason appraisal is not necessary:

Disposition Recommendation:

- Gift/Exchange (another institution)
- Sale/Auction
- Destruction
- Repatriation
- Other: _____

Elaboration and justification:

Authorization:

(sign and print name)

Archivist: _____ Date: _____

President: _____ Date: _____

Attached:

- Gift Agreement, invoice, or other proof of ownership
- Condition Report
- Incident Report (if applicable)
- Photograph(s)
- Copies of relevant correspondence (donor, artist, museum colleagues, repatriation request, etc.)
- Copies of relevant sections of board/executive meeting minutes
- Appraisals, if obtained



DEACCESSION CHECKLIST

Accession Number: _____

Object Name and Description: _____

Approval & Notifications

All signature and date lines have been signed in Deaccession Proposal

date & initial: _____

Notifications complete as per Deaccession Proposal

Donor or heirs

date & initial: _____

Artist

date & initial: _____

Museum community

date & initial: _____

Display

Accession number removed from object

date & initial: _____

Exhibit labels and other textual references removed from display area

date & initial: _____

Disposal

Repatriated

date & initial: _____

Transferred/Exchanged

date & initial: _____

Auctioned/Sold

date & initial: _____

Destroyed

method, date & initial: _____

Other (specify)

method, date & initial: _____

Documentation

Photographs taken (multiple views)

Note: 2-dimensional objects should be scanned if possible

Copy in deaccession file

Copy in digital deaccession file

date & initial: _____

Exchange/Transfer agreement completed, if applicable

Original in deaccession file

Copy in digital deaccession file

date & initial: _____

Repatriation legal title transfer completed, if applicable

Original in deaccession file

Copy in digital deaccession file

date & initial: _____

Accession files updated

Gift agreement and any catalogue worksheets marked "Deaccessioned"

date & initial: _____

Digital copy of Deaccession Proposal uploaded to CollectiveAccess database

date & initial: _____

Database record updated

CollectiveAccess Deaccession field completed

date & initial: _____

CollectiveAccess Access field set to "not accessible to public"

date & initial: _____

Record and image files removed from Artefacts Canada

date & initial: _____

Digital spreadsheet record updated

date & initial: _____