

GUIDELINES FOR THE OPERATION OF COMMUNITY MUSEUMS IN NEWFOUNDLAND AND LABRADOR

2nd Edition

Museum Association of Newfoundland and Labrador

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Foreword

The publication of the “Guidelines” is a milestone in the work of the Museum Association of Newfoundland and Labrador. It is a strong addition to the work of community museums in this province.

I hope that you will find the Guidelines to be useful. Don’t keep it at home – keep it in the museum, in full view, so that everyone involved in the museum can use it as a reference. Use it to assess your museum: what are its strong points? What are its weak points? What needs to be done? What needs to be done differently? What are the priorities? How can the Guidelines help future planning?

Thank you to the Guidelines Committee and to our Executive Director/Professional Development Officer, Penny Houlden, who put long hours of careful thought into this project. Thank you too, to the many MANL members who contributed their experience, and the know-how to the Committee. And, finally, thank you to those museum professionals in the province who volunteered their experience and advice.

The Guidelines are the result of consultation throughout the museum community in the province. Everyone should take pride in it.

Jo Shawyer
President

Preface to the Second Edition

In 2007, the Best Practices Committee of the Museum Association of Newfoundland and Labrador embarked on a project to update and expand the best practices resources available to MANL's membership. One aspect of this project was to review and update areas of the *Guidelines for the Operations of Community Museums of Newfoundland and Labrador*.

The second edition includes additional information in the areas museum governance, finance, human resources, community standards, conservation and emergency planning and disaster response. In addition, some of the language and museum terminology was updated. Since initial publishing much of the contact information in the Resources List has changed, this information has been updated in the second edition.

In addition to the creation of the second edition of the *Guidelines for the Operations of Community Museums of Newfoundland and Labrador*, the MANL Best Practices Committee has also created a supplementary publication called *Practical Resources for Developing Museum Policy and Procedures*. This document will assist museums in the creation of their own policy and procedures through the provision of resource lists and actual examples of current policy and procedure document from various museums. This document contains resource lists of online and print publications that deal specifically with writing museum policies and procedures and also includes access to actual examples current museum policies and procedures. Guided by the *Guidelines for the Operations of Community Museums of Newfoundland and Labrador*, users of this resource can create the recommended museum policies and procedures for their own museums.

Catherine Rice
Editor

Teresa Green
Chair, Best Practices Committee
Museum Association of Newfoundland and Labrador
2008

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Introduction

Since 1980, the Museum Association of Newfoundland and Labrador has conducted a program of advisory services and museum-related seminars with the aim of aiding “in the improvement of museums.”

During the Association’s Annual General meeting of October 1988, this work was taken one step further. MANL’s Membership directed that “a committee be struck to investigate and recommend standards which would be appropriate for the museums and other such institutions in Newfoundland and Labrador.” The final result is the consolidated listing of practical and achievable goals for museum operations contained in this binder!

Our discussions during that 1988 meeting were very much influenced by the example set for us by the Museum Association of Saskatchewan. MAS’s Museum Advisory, Wendy Fitch, attended our meetings and spoke of the effectiveness of their “Standards” project. In Saskatchewan’s experience, “Standards” had proven a useful tool in helping Museum Boards plan for the long-term development of their institutions.

MANL’s Board subsequently put together a Committee. The group made two fundamental proposals:

- MANL would use the term “Guidelines” rather than “Standards” in order to clearly indicate that the steps recommended to museums were not require by an outside agency. Rather they were offered as a self-help tool to be used by each Museum Committee for their own purposes.

The committee was well aware that every Museum board has different resources to work with and different goals for their museum. As a result, particular “guidelines” will be relevant to some museums, but not to others. The cost of implementing the guidelines was another concern. Some of the guidelines suggest the development of policies and procedures and require only time and thought to be achieved; however, others suggest improvements in facilities and programs and will require money. As result, a museum committee may want to meet certain guidelines, but may need to defer this particular project until the necessary resources are found.

With these thoughts in mind, MANL’s efforts were officially named the “Guidelines” project.

- MANL would fundamentally follow the model established by the Museums Association of Saskatchewan. The “standards’ developed in other provinces were reviewed by MANL’s Guidelines Committee, for additional input. However, MAS’s “essential” and “basic” level standards were seen as particularly appropriate to museums in our province.

During two meetings and nine grueling teleconference calls from April 15, 1989 - August 2, 1990, the Guidelines Committee worked in detail through each point listed below. On two occasions, we stopped for input from each community museum in the province. Staff members of the Newfoundland Museum were asked for input in their areas of special expertise. Drafts of the working document were circulated; comments were gathered by the Committee members and added to the text.

Then came a hiatus while the MANL Board searched for funds to assist with the costs of printing and distributing the “Guidelines.” While President Jo Shawyer prepared the checklists, a number of approaches were made. Happily, support was offered by the Government of Canada through Parks Canada, Secretary of State and the Museums Assistance Program, Canadian Heritage, and by the Government of Newfoundland and Labrador, Department of Tourism and Culture.

MANL’s “Guidelines” package will never be complete. We plan to update the recommendations from time to time, and to correct any errors that may be found.

Our hope is that this material will help your Museum Committee as you strive for excellence in the work that you do.

Gilbert Higgins
Chairperson
Guidelines Committee

Acknowledgements

MANL wishes to thank many people and organizations for their help in making the Guidelines project a reality.

Special thanks go to the Guidelines Committee members:

- Gilbert Higgins, Port au Port/Bay St. George Heritage Association
- Ray Troke, Parks Canada
- Allan Clarke, Newfoundland Museum
- David Mills, Historic Resource Division
- Jean Small, Twillingate Museum
- Paddy O’Keefe, Placentia Area Historical Society
- Penny Houlden, MANL

Rose Smart, Blair Withycombe, Susan Maunder and Jill Finaly – all of the Newfoundland Museum – edited sections of the Guidelines text. Jo Shawyer prepared the Checklists. Penny Houlden and Bernie Clarke did the leg work for the final publication. Beth Oberholzer designed the cover and guided the layout and printing. Bruce Shawyer prepared the camera ready copy.

Particular thanks are due to the Museums Association of Saskatchewan for their generosity in allowing MANL to borrow freely from their “Standards”; and to MAS Museum Advisor Wendy Fitch for her continuing assistance with the project.

The “Guidelines” could never have been completed without the financial support of a number of agencies:

- The federal Museums Assistance Program of Canadian Heritage provides funding towards MANL’s Professional Development Program – the “Guidelines” were a special project within these broader efforts.
- The Secretary of State, Parks Canada, provided special support towards the publication costs.
- The Provincial Department of Tourism and Culture provided major support towards the publication and distribution of the “Guidelines” binder.

Finally, thanks must go out to all the MANL members who contributed to discussions and to the reading and editing of early drafts of the text.

How to Use this Material:

“The Guidelines” consist of three elements. Each is marked by a tab in the binder.

1. “Guidelines”


These detailed listings itemize the basic elements of museum operations. They begin with the essential work of Museum Boards – “Museum Management” and then review each of the five basic museum operations – Collections Management, Research, Care of Collections, Exhibitions and Interpretation and Public Programs.

These guidelines are your permanent record of accepted models of excellence in today’s museum community.

You will note some repetition in specific guidelines recommended in various sections. The Guidelines Committee felt that it was better to repeat guidelines in overlapping areas rather than to presume that the Museum Board could review all of the Guidelines at any one time.

2. Resource List

The Guidelines occasionally refer you to agencies or organizations that can provide you with more detailed information. In order to minimize the problem of updating address and telephone numbers as they change over the years, we have listed all of these in one resource list.

The symbol  following a guidelines, is to direct you to a reference to one of these organizations.

3. Checklists

The checklists are intended as a working tool for your group. They repeat the Guidelines in summary form, providing you with a format for assessing your museum’s current operations and for listing improvements that should be made. Please plan to copy the original and to use this copy for your notes. Checklist summaries are also enclosed.


Your museum committee can review one subject area at a time or work on all aspects of the museum’s operations. Ideally, the checklists will be updated annually and will be used as a tool for setting priorities for that year’s projects. Over the years, the checklist summaries will provide a continuing guide – and a chart of the progress of your work.

A “sample” checklist and summary sheet follow.

Where to find further information

As your committee works through the Guidelines, you will undoubtedly come across some projects that you are not sure quite how to tackle. You might, for example, be wondering who to write a Statement of purpose, or where to find the correct supplies for making accession numbers on artifacts.


Please remember that the MANL office can help you with this information. MANL's Executive Director can provide you with appropriate books or articles from the Resource Centre or will put you in touch with someone who has direct experience related to your project.

Please don't hesitate to call or write if you have any questions. 

14. Research / Resource Centre

Date _____ Initials _____

	Y	N	N/A
1. Does the museum promote research about its themes and its collections	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Does the museum delegate responsibility for encouraging research activities to a specific individual?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. If the museum is housed in a historic building, has the history of the building been researched?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Does the museum possess a library of reference material for use in research projects?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum have specific space set aside for research activity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Does the museum attempt to research artifacts as they are being catalogued?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum make its collections and reference material available to visiting researchers?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the museum supervise researchers?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the museum instruct researchers to respect the condition, security, and handling of artifacts/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. Does the museum restrict visiting researchers from access to confidential information about the ownership or value of its collections?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
8. Does the museum request that researchers acknowledge the museum as a source in their use of the research?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum abide by copyright and reproduction guidelines in its research? 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10. Does the museum request that each oral history informant sign a release form granting permission to publicly use the information obtained in the interview?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comments and recommendations:

EXAMPLE PAGE

We have a long way to go! We should take on more research projects of our own and encourage others to research our artifacts and the community's history. Especially since one of our own goals is to be a community research centre.

1. Need to recruit someone to focus on research. Would Agnes Dolan be interested? (she's written her family history)
2. Milly Power is getting old. We must interview her soon. Her dad built the museum as a home for John Trask in 1908.
3. Could we set aside something in each year's budget to buy more reference books? Lets check with the public library to avoid duplication. Since our Budget will be limited for the foreseeable future

Checklist Summary: Research

EXAMPLE PAGE

Priority	Date: August 31, 1993	Initials: PH
1	<i>Find someone to take on responsibility for research.</i>	
2.	<i>Set aside an amount in the annual budget for purchase of reference books.</i>	
3.	<i>Develop a sheet advising researchers to make appointments to research or photograph our collection noting proper handling techniques and requesting acknowledgements in publications</i>	
4.	<i>Train summer staff to deal with requests from visitors to handle or photograph artifacts</i>	
5.	<i>Use summer student to interview Milly Power about her father and his work as a house builder and furniture maker.</i>	
6.	<i>Approach high school class to do research (and an exhibit?) on the owners and makers of artifacts in the collection</i>	
7.	<i>Fundraise for a computer and furniture for research room.</i>	

The Guidelines

Museum Management

The goals of these Museum Management guidelines are to assist in ensuring both the effectiveness of the museum and its stability as an institution.

Specifically, the management guidelines aim to provide direction regarding:

- The role of each museum in its community
- Effective organization and planning by the museum committee
- Accountable financial practices
- Responsible management of the museum's volunteer and paid staff
- The maintenance of museum building which are safe for the visiting public and secure for the artifacts.

1. Working with a vision: Statement of Purpose

As your Museum Board works through the Guidelines, you will be setting goals for the improvement of the technical aspects of the museum's operations. It is also important to have a guiding vision of the role that you want your museum to play in your community.

While every museum should strive towards an overall balance in its activities, each will have a particular focus based on the unique resources available to the Museum Board. Much will depend on the nature of your museum's collections, the interests of the Governing Authority, the demands of the museum's visitors and the other resources and services available in your community or region. From a consideration of these opportunities, each Museum Board can build a shared vision of the purpose of its museum.

Should the Museum Board focus particularly on **collections, research** and **preservation**?

- Is the primary importance of your museum its collections? Do you have in your care a particularly unique collection of artifacts of provincial or national significance?
- Do you have other important resources – such as a collection of genealogical records, a community that has been particularly known for its singers, craftspeople or artists? Should these be recorded in an archive of documents, audio or video tape?
- Is the museum set within an historic community? Is it important that the museum play a role in preserving the buildings and landscape of your community?

Should the museum Board focus particularly on **exhibitions** and **public programs**?

- Are there other cultural institutions in your community? Is there a role for the museum as broadly-based cultural centre? Should the Museum Board plan, for example, to include exhibitions of current art, presentations of dance, theatre and music?
- What audience do you serve?
- Is your museum located in an area that attracts a large number of summer-time tourists? What kinds of special information or services do they need? Should the museum's attention be focused on such activities as summertime programs, multilingual services, or marketing efforts?

Can the museum play a stronger role in your own community?

- Can the museum cooperate with the municipal council in community planning or in the celebration of the town's special "day"?
- Do local schools have an interest in supplementing the curriculum with hands-on experiences at the museum?
- Are there a number of seniors who could contribute to the museum's activities as volunteers or sources of information? Can the museum provide activities that would be of particular interest to seniors?
- There are, in fact, a multitude of audiences – age groups, ethnic groups, social groups – all of whom can contribute to and benefit from the work of the museum.

Research centre, tourism attraction, educational resource, cultural centre, forum for heritage activism –

- How would you define your vision of the museum's role?

2. Governing Bodies and Museum Boards

Governance refers to the methods that a museum's governing body uses to oversee the functions and operations of the museum. Those that govern the museum, take full responsibility, including legal responsibility, for the museum and its collections which the museum holds in trust for the community.

Good governance improves efficiency and effectiveness in both museum administration and operations. It helps to guide staff and volunteers by defining and communicating their roles and values within the organization and ensures that the museum operates in a systematic and consistent manner. Good governance is the first step in ensuring that the museum operates in a sustainable and accountable manner.

Who Governs?

Governing Bodies and Museum Boards

The ways in which a museum is governed vary depending on how the governing body is organized. In some cases the museum belongs to a larger organization that has interests and responsibilities beyond the museum, such as a historical society, community council, or church council. In other cases, the museum is an independent unit and the body that governs is also responsible for the day to day functions of the museum.

A larger organization may elect or appoint a committee or board of directors composed of members of the society or council and charge them with the overseeing the guiding principles and policies for the museum and delegating responsibility to others to implement those directives.

Other boards are charged with developing policy and management frameworks and stay involved in the day-to-day workings of the museum. These boards may establish working sub-committees who become responsible for areas such as human resources, fundraising, finance, collection management, exhibit planning, and programs.

Sometimes, when a museum organization is very small and has limited staff the board will be responsible for implementing all functional operations within a museum.

In the interest of simplicity, these guidelines will use the term **Governing Body** to refer to organization responsible for overseeing the guiding principles and policies for the museum and the **Museum Board** to indicate the body responsible for the day-to-day administration of the museum.

The Responsibilities of the Governing Body and Museum Boards

There are a number of primary responsibilities of a museum's governing body and museum board.

Ensuring that they are incorporated body

The Governing Body should be incorporated through application to the provincial government's Registry of Companies. The museum's governing body will be required to submit information describing what the corporation intends to be, its structure, what its activities will include and how it intends to pursue these aims. There are a number of benefits associated with incorporation:

- It provides protection of members from individual financial liability associated with the museum. It should be noted that in the event of the museum's bankruptcy, members of the Governing Body can remain individually liable for certain payments to government.
- It creates eligibility for various sources of funding. Certain funding sources, such as provincial and federal grants, require that the governing organization be incorporated.

Ensuring that the organization develops constitution and bylaws

Included in the constitution there should be;

- a schedule for regular meetings that follow a written agenda and maintain a written record in the form of minutes which records all discussions and decisions. This includes a regular schedule of meetings between the Governing Body, the Museum Board and as well as other individuals responsible for the administration of the museum such as a museum director or curator.
- a clear description of the purpose and objectives of the museum, as well as the duties and responsibilities of the governing body and/or the museum board as well as its, its officers and committees.
- a schedule for the terms of office and membership.
- written and ratified provisions for the dissolution of the museum's assets and liabilities if the museum should close or cease to operate.

Defining Membership

A consistent and transparent framework for membership of the governing body and the museum board should be established for each museum. A membership term should be

established and an executive should be created with a system for appointing or electing officers (chairperson, treasurer, secretary etc.) as well as any standing committees required.

Members of each board should reflect the diversity of the community and demonstrate a strong interest in the museum as well as capable of committing time and energy. They should also bring various talents and knowledge that can assist in the success of the museum including the areas of business, financial and political procedures.

All new members of the governing body should be given an orientation and provided with information about the museum and its governance to assist them in carrying out their duties. This includes a description of their roles and responsibilities of the members and volunteer staff, information on any personal liabilities that may apply to members, lists of resources and training opportunities and an indication of the term of office.

Ensuring that the museum's vision or statement of purpose is both relevant and fulfilled

Together with the museum board, the governing body is responsible for the creation of a written Statement of Purpose. This statement will guide all planning and decision making and is key in the maintaining long term direction of the museum - even as membership of the governing body and museum board change.

Ensuring that all aspects of the museum are in accordance with professional and ethical standards for museum operations

All aspects of the museums operations must be both ethical and professional. The museum's governing body must work with the museum board to:

- adopt of a code of ethics which will guide the behaviour of the board, staff and volunteers.
- recruit, supervise and evaluate the museum's curator or director.
- ensure that proper training and education are provided for all those involved in the museum's operations.
- ensure the proper care and preservation standards are employed during the research, storage, transport and exhibit of the museums collections.
- ensure that all interpretation and programming are developed in a professional and publicly accountable manner
- ensure that the museum meets legal requirements for financial, operational and safety standards as outlined by municipal, provincial and federal standards.
- ensure that the museum demonstrates both accountability and transparency in their actions and advocates the role of the museum in the community.

Ensuring that the museum is financially sustainable

The museum's governing body is responsible for general oversight of the museum's financial resources and can be held liable for debts of the museum. The governing body must ensure that the museum is adequately funded and that all financial policies and procedures are ethical and transparent. It is the responsibility of the museum board and staff to implement these financial directions. The governing body should work with the museum board to develop these policies and procedures.

The written financial policies and procedures of the museum should address museum funding, budgets, financial statements and reports, schedules for financial statements as well as an outline of what information should be provided in these documents. This document should also indicate the authority for the approval of budgets, grant applications, fundraising, spending and spending procedures. The governing body should work with the museum board to develop these policies and procedures.

Ensuring that written policies and procedures are developed for museum governance and operations

The creation of policies and procedures regarding the governance and administration of the museum is ultimately the responsibility of the governing body and is done so with the cooperation of the museum board. These written documents clearly define the vision of the museum through various operations and outline the methods by which these operations will be performed. The museum board ensures that these policies and procedures are implemented.

Establishing a system of communications with Administrators and Staff

All museum activities should be summarized in a **WRITTEN annual report**. This report should be prepared by those that are responsible for the daily administration of the museum such as the Museum Board and submitted to the Governing Body of the museum. In the case of an independent museum society, this report should be submitted to the membership at the time of the Annual General Meeting. Annual reports should address all aspects of the museum's operations including collections, exhibits, programming, finances and administration.

The annual report provides valuable information to all stakeholders on the activities and achievements of the museum. It provides a means by which the Museum Board and Governing Body can evaluate the museum's operations and plan for future activities of the museum. These reports are an important means of providing related organizations, such as town councils and MANL, with information about the work of the museum.

Establish a 3 -5 Strategic Plan

Together with the governing body the museum board should prepare a formal, 3 – 5 year strategic plan for the museum. This plan will assist in the planning for funding and resources for the operations and programs for the museum, as well as provide a clear and continuous path for the museum regardless of changes in the museum board or staff. It acts as the map for the museum future and serves as a practical means of applying for grants and financial assistance.

3. Community Standards

Museums are stewards of a community's heritage. To promote a positive and accountable relationship with the community, museums should strive to meet their needs and interests and encourage participation in the museum's decisions, goals and directions. Museums should actively identify and pursue appropriate community partnerships and volunteer opportunities. At every opportunity, a museum should aim to provide equal access to all members of the community, both physically and intellectually, to the museum's collections, information, services and programs.

1. The museum should have a WRITTEN policy defining its' relationship with the community
2. The museum must ensure that they are good stewards of the collection. This means ensuring that appropriate research, documentation and care of the collections are performed.
3. Museums should provide services and programs consistent with its statement of purpose and that meet needs and interests of the community.
4. Museums should allow all sectors of the community to participate in the museums decisions, goals and direction and include members of the community in museum activities.
5. Museums should identify and pursue community partnerships.
6. Museums should provide access to information about museums collections, services and programs through advertise hours which meet the needs of the community and make its services available through appointment for seasonal sites.
7. Museums should have a volunteer program to encourage community participation in its activities.

4. Museum Policies and Procedures

Written policies and procedures provide a framework for all museum operations and provide guidelines for all future decisions. They provide a tangible resource for both board and staff and preserve this information through the various changes that a museum will inevitably undergo. Equally important, policies and procedures that are consistent with standards and best practices of the International Council of Museums (ICOM) help to ensure that your museum operates as a permanent institution in service of society, in other words a sustainable and accountable institution.

The level of policies and procedures required by a museum will depend on the size of the museum as well as its functions. A small community museum may require only brief policy and procedure documents and, for example, may include their exhibit policy within their interpretation policy or their conservation policy within their collection management policies.

1. All policies and procedures documents do not have to be prepared at one time. It is likely that many museums already have many policies and procedures in place and now only need to create a written document.
2. When creating your policies and procedures, ensure you address your basic museum operations first, for example, governance or collections management.
3. Policies and procedures should be simple and appropriate to the institution. Avoid creating unnecessary policies and procedures as they can become unmanageable.
4. Policy and procedure documents should be guided by a Statement of Excellence. Under the Statement of Excellence every aspect of the museum's operations should be covered.
5. All policies and procedure should be written in a clear and consistent manner. They should be communicated and accessible to the public, staff, management and governing bodies.
6. Keep your policies and procedures current. Operate your museum from your policy and procedures manual rather than promising changes in your annual review. By doing so you ensure that they are appropriate and effective documents.
7. From time to time values and perspectives change and statements may have to be altered. Ensure that the museum board review policies and procedures on a regular basis.

8. When creating your policies and procedures involve museum management and staff, this not only assists the board in ensuring that these policies and procedures are relevant and practical, but also encourages staff involvement and commitment in the success of the museum.
9. Policies should provide a framework within which curators, managers, or executive directors have the authority to make decisions and choices regarding the museums operations. Detailed involvement of the board in daily museum operations is unnecessary and can have a negative impact of staff efficiency and creativity. For example, Rather than approved budgets there should be a board budget policy.

Museums should to adopt policies and procedures regarding:

Governance and Management

- Governance
- Strategic and Business Plans
- Finance
- Human Resources
- Research and Access
- Community Standards
- Public Relations and Marketing

Building and Facilities

- Health, Safety, Security and Building Maintenance

Collections Care and Management

- Collection Management
- Preservation/Conservation
- Disaster/Emergency Preparedness Plans

Interpretation

- Interpretation and Education
- Exhibition

5. Finances

All businesses, including non profit organizations such as museums, require good financial management. The benefits of effective financial management reach all areas of museum operations and therefore essential for museums to be both accountable and sustainable. Museums should demonstrate a commitment to ethical behaviour in the pursuit of funding and be transparent in all financial matters. Accurate financial information is required for annual tax returns as well as for applications for financial assistance from both governmental and non-governmental sources.

Each Museum Board should have a Treasurer who is responsible for:

- monitoring the finances of the museum on a regular basis
- preparing a **WRITTEN Budget** at the beginning of each fiscal year which is approved by the governing body and the Museum Board.
- creating **Interim Financial Statements** which should also be reviewed by the Museum Board on a regular basis.
- creating an **Annual Financial Report** which is presented to the museum's governing body.

If the size of the museum's budget warrants, the Governing Body may require an **External Financial Review** or an **Audit** in order to confirm the accuracy of the financial statement.

6. Paid and Volunteer Staff Management

The following guidelines apply to the management of both paid and volunteer staff, such as the word “staff” is meant to apply in both cases.

How successful a museum is in their operations and obligations to the community is directly determined by the strength of their human resources. Museum Boards must ensure that staffing of the museum takes place in a consistent and professional manner and that each area of a museum’s operations is specifically delegated to a responsible individual(s). Separate areas of responsibility include: finance, collections documentation; acquisitions and loans; security; collections preservation and conservation; collections care and storage; programming; exhibition and interpretation design, development and care; public relations and marketing.

These goals are achieved through the adoption and implementation of a **WRITTEN Personnel Policy**. This policy should be created by the Museum Board and ratified by the museum governing body. A copy of this policy should be provided to each staff person at the time that they are recruited.

A Museum Personnel Policy should:

- state a commitment to recruiting individuals that are properly trained and are aware and dedicated to the ethical standards for museum operations. This should also include a commitment to continual staff training and professional development through external workshops and seminars or in-house training.
- state that all paid or volunteer staff should be able to obtain a certificate of good conduct for security reasons.
- state that all paid or volunteer staff should be physically capable of performing their job duties. In turn, museums should strive to provide equal access to the workplace by staff of all abilities.
- ensure that all staff members are provided with a complete written job description.
- ensure that a regular schedule of staff meetings is established.
- address matters regarding hours of work, conditions of overtime, paid holidays, annual vacation, leave for sickness, maternity/paternity leave, bereavement leave, education leave, travel cost, honoraria, probation, grievances and review. For volunteer staff they should address matters relating to travel costs, insurance coverage, and assistance with cost of training.

- address recruitment, performance assessment, termination, equal opportunity, health and safety regulations. These policies and procedures should comply with provincial and federal legislation.
- ensure that staff are provided with information on health and safety hazards in the workplace and are trained in their management or mitigation.
- ensure that staff are provided with appropriate facilities and work spaces as well as staff break and lunch spaces. This will ensure that food and drink can be kept separate from the collections. If space can not be provided on the premises then arrangements should be made off site.

Staff Training and Professional Development

As employers and stewards of the museum collections, it is the responsibility of the Museum Board to ensure that museum staff receive a continuum of training regarding their various duties with the museum. Every effort should be made to ensure that training opportunities are readily available to the museum staff. This may include providing both time and funding from external training sources or for in-house training and staff reference material.

7. The Museum Building and Physical Safety

The safety of the public, staff, and collections depend on the regular maintenance of museum's buildings and grounds. These actions affect both the functionality and operations of the museum and are essentially the foundations of the entire museum operations. Museums can be liable for injuries to the public and staff that are caused by the physical museum conditions. Allowing your museum building and grounds to deteriorate can cause expensive and irreparable damage to the building and your collections.

In order to be both publicly accountable and sustainable it is the museum's responsibility not only to maintain the facilities but also to plan for the emergencies when they happen. Activities such as environmental monitoring and control, general building maintenance and repair, risk management and disaster planning fall under these operations.

1. Maintenance

- A routine maintenance and repair schedule should be established for the museum. This should include a written set of maintenance procedures and a policy that prioritizes repairs that are required. Where the museum must rely on an outside agency for the maintenance and repair of the building and maintenance of the grounds, there must be an established procedure for access to that service, and a routine maintenance schedule agreed upon.
- The Museum Board should arrange for the **routine maintenance** of the museum's grounds, including snow removal if appropriate.
- The Museum Board should ensure that regular **building inspections** are undertaken, including plumbing, heating and electrical inspection
- For **seasonal institutions**, it is essential that there is an established, WRITTEN procedure for winterizing the building and its contents, and for reopening in the spring.

2. Preservation of the Site

- When a museum is housed in an **historic building** the Museum Board should be aware of the importance of conserving the heritage value of the structure itself
- Those museum buildings that are officially recognized as historic by the Monuments Board of Canada, designated as historic sites by the Provincial Government, as heritage structures by the Heritage Foundation of Newfoundland and Labrador or as significant buildings by a municipal council should comply with standards for the restoration and maintenance of the building as established by these groups.

- Those museum buildings that are not officially registered as heritage structures but, nonetheless, are of some historic or social importance, should be restored and maintained to standards that would preserve the heritage integrity of the building while being compatible with their use as museums. ➡

3. Safety of Staff , Public and Collections

- The museum building should comply with **National Building Code**. ➡
- The Museum building should comply with federal and provincial **public health and safety standards**. ➡
- The Museum Board should consult with the fire marshal, in order to ensure that the museum is in compliance with the **fire code**. Detectors, alarms, reporting systems, and suppression systems should be installed as appropriate. ➡
- Dry chemical ABC type fire extinguishers should be kept on site. Where a fire suppression system is installed, a “dry” water sprinkler system is recommended.
- In order to **minimize the risk of fire** potentially flammable materials such as cellulose nitrate films and biological material preserved in spirits should be isolated from the rest of the collection.
- The museum should have clearly marked **emergency exits** which open outward.
- Plans for **exit routes** in the event of fire or other emergencies should be clearly posted.
- In order to **minimize the risk of fire** potentially flammable materials such as cellulose nitrate films and biological material preserved in spirits should be isolated from the rest of the collection.
- If the museum has **specialized collections** such as archives or photographic collections, advice should be sought from a **trained conservator** about fire safety/suppression equipment and procedures.
- The Department of Employment and Labour Relations requires that a **First Aid Kit** be kept at the museum, and at least one of the workers on any one shift have a valid Emergency First Aid Certificate. A second level First Aid Certificate, including CPR training, would be recommended. ➡

- An up-dated list of all chemicals used, ingredient, effects and hazards, should be maintained, for the knowledge of the staff and the fire chief 🖱
- The Museum Board should ensure that there is an up-to-date list of **emergency telephone numbers** posted in the museum (police, fire, doctor, ambulance, and conservation help in the event of a disaster).

4. Insurance

- The Museum Board should ensure that **public liability insurance** is acquired against the event of an accident on museum property.

5. Disaster/ Emergency Preparedness Plans

- The Museum Board should ensure that a WRITTEN **emergency preparedness /disaster plan** is prepared. This will detail procedure to be followed to salvage the museum's collections in the event of a flood, fire or other disaster. For more information on this see **section 9 – Emergency Preparedness and Disaster Plans**.



Please photocopy this page and place by the telephone in the museum.

Keep this list up to date.

Emergency Telephone Numbers

Doctor	
Ambulance	
Fire	
Police	
Disaster Plan contacts	Canadian Conservation Institute: 1-866-998-3721 Conservator, Provincial Museum: (709) 757- 8123 Association of NL Archives: (709) 726-2867 Museum Association of NL: (709) 722-9034

8. Public Access and Public Services


1. The Museum Board should ensure that there are clear, prominent signs providing directions to the museum, both on the outskirts and within the community. These signs must, of course, comply with Provincial and Municipal signage laws. 
2. Public service signage, marking exits, washrooms, resource rooms, gift shops, etc., should always be clear and prominent. For certain technical messages, internationally recognized symbols can be more effective than words. For institutions in bilingual communities, bilingual signage is recommended.
3. Every effort should be taken to provide full and equal access to those with physical challenges. This includes both public and staff spaces. This consideration should extend to a broad range of challenges, including visual and hearing, as well as mobility. 

When substantial renovations are made to an existing museum building or a new building is constructed, provisions for **access for the physically challenged** are required by law. Advice with regards to specific requirements can be sought from the municipality, as part of the process of securing a permit to build or repair.

4. The Museum Board should ensure that the corridors, stairs and public areas are **well lit**.
5. The Museum Board should ensure that provisions are made for clean and well maintained rest rooms, adequate for the number of staff and visitors.
6. The Museum Board should ensure that museum-owned roads and side walks are maintained in a safe condition.
For nature interpretation centres and other sites involving interpretive trails, the paths must be laid out so as not to physically endanger visitors. Visitors should also be provided with maps unless clear, prominent signage is provided.
7. Where the museum is open year-round, walks and access doors must be kept clear of snow (or sanded) in winter, in order to ensure the safety of staff and the visiting public.

When museums are open for the summer season only, it is still recommended that clear access to doors be maintained throughout the winter, in order to allow routine security

and environmental checks of the building and artifacts and to permit access in the case of emergency.

8. The Museum Board should ensure that regular **operation hours** are prominently posted, and properly maintained. If the museum is open only by request, a request system should be organized that is reliable and easy for visitors.
9. If the museum operates a **food service**, the Museum Board of Directors must ensure that this complies with public health and safety regulations. 
10. As food can attract insects and other pests and can be accidentally spilled, causing damage to artifacts, food and drink should be prohibited in areas with artifacts.

The Museum Board should also ensure that the food service facility does not interfere with internal environmental control measures, affecting the safety of the museum's collections

9. Emergency Preparedness and Disaster Plans

An important part of any museum's operational and risk management plans are **emergency preparedness and disaster response**. These plans will not only provide direction on how to prevent emergency situations but also what will need to be done to respond effectively if a disaster occurs. Having a good plan in place can mitigate damage to the museum's collections and facilities as well as protect the museum staff and public.

The first step in a museum's emergency preparedness planning is to assess the possible risks. Museums can face varying threats based on such things as the nature of the building, the collections and the geographic location. In Newfoundland and Labrador, the most common large scale threats are in the form of fire, water, insects, mould and incorrect storage conditions (temperature, relative humidity and light). It is also important to note other threats to collections can take the form of inappropriate handling, vandalism and theft. While these are not as large in scope, even the damage or destruction of a single item of the museum's collection must be avoided.

Once these risks have been determined, plans to prevent them can be made. Using an Avoid, Block, Detect, Respond, Recover approach, this plan will outline what measures a museum can take to prevent a disaster, as well as what steps to take if one occurs.

Avoid – Block – Detect – Respond - Recover Approach:

Avoid Ensure that conditions that may result in disaster are avoided. This can include regular maintenance to the museum facilities to avoid flooding, leaks, fires, and pests as well as creating policies and procedures that prevent the risk of these elements such as creating restrictions to food in certain areas of museums, establishing security procedures and plans, and establishing appropriate handling procedures.

Block Often it is not possible to avoid potential risks, such as when museums are located in an area of frequent flooding, a facilities space limitations place collections near plumbing or the exhibit area of the museum has windows. In these cases, measures should be taken to prevent a situation, such as a flood, inappropriate lighting or vandalism, from affecting the collections. Museums can ensure that collections are stored off floors or covered to protect from leaks, windows can be covered with curtains or UV protection films, or objects can be exhibited in locked exhibit cases.

Detect If an emergency situation cannot be avoided or blocked, then early detection of the problem is essential. Regular inspection of the facilities and the collections will help to detect damage early. Smoke, fire, water, and door and window breach detectors can be installed. Inspection frequency and placement of detectors is dependent on the rate and risk of each agent, for example, fire/vandalism versus pests/water leaks.

Even with the best prevention efforts, sometimes an emergency situation will arise which result in disaster or damage to the collections.

Respond How a museum responses to an emergency or disaster will have a direct effect on the success of saving museum collections. Since most emergency situations come without warning, the museum board and staff must be prepared with an organized approach to the situation and have the resources available to respond, that is, a disaster plan. The disaster plan can be a lengthy document, but it is a very important one for any museum. The disaster plan will provide direction on who will respond, how they will respond, what resources are available and were to find them. 📖


Recover Once the museum has responded to the disaster they will immediately enter into the recovery of the museum's facilities and collections. This requires resources and skills that are not a normal part of the staff and volunteers duties. As the steps take during this process are important in mitigating damage, museum boards should insure that staff and volunteers are provided with the appropriate resources and training. A good disaster plan will include a disaster response kit which will include those items that will assist in recovery. 📖

While that focus of this section has been on emergencies and disasters with respect to collections. Museum's should also insure that same approach is made for the **safety and protection of the public and staff**. An emergency preparedness/disaster plan should also include how the museum will respond to such things as medical emergencies. 📖

10. Insurance

1. The Museum Board must ensure that **Public liability insurance** is purchased.

This is an essential step to protect the Museum, its staff and visitors, against injury due to accidents on the museum's property.


2. The Museum Board is advised to purchase a **comprehensive insurance policy** to protect the building, equipment and furnishings against fire, theft or water damage.
3. The Museum Board is required to provide paid staff with insurance coverage against injury on the job, through the **Workplace Health and Safety Compensation Commission** 
4. The Museum Board should consider purchasing **insurance to provide Volunteer staff with coverage against injury on the job**, or injury while travelling on museum business.
5. The Museum Board should consider purchasing **insurance for artifacts on temporary loan** to the museum. If this is not done, the lender should be aware that the museum accepts no responsibility for loss or damage to the artifacts while it is in their possession. The lender might be encouraged to continue insurance coverage of the artifacts, themselves, while it is on loan to the museum.
6. The Museum Board might consider buying insurance against the **theft or damage** of artifacts within the museum's collections. While such provision might help an institution purchase artifacts as replacements for those which might be lost by such means, it must be remembered that this is often of little consolation in replacing the unique items which form the bulk of a museum's collections.

11. Museum Shop / Sales Activity

1. The Museum Board should prepare a **WRITTEN policy governing sales activities** for the organization.
2. No sales activity should be undertaken that jeopardizes the institution's financial well-being or its public image and credibility.
3. Ideally, material sold by the museum shop should relate to the museum's theme, its collection, or exhibits.
4. Specific training should be provided for any individual involved in the operation for the museum shop.
5. The Museum Board should delegate one person to assume overall responsibility for sales activities.
6. All sales activity should be based on sound, established marketing/business practice. Professional advice should be sought whenever needed.
7. Proper budget and accounting procedures should be followed and regular audits done, when revenues are sufficiently high to warrant.
8. All replicas or reproductions sold should be clearly and permanently marked as such.




Collections Management

The collection of artifacts is at the core of the museum's work, but if the artifacts are not accurately and thoroughly documented, much of the historic value of the objects is lost. Equally, if the collection is not well managed – if artifacts on loan are lost, for example – the credibility of the museum is severely endangered.

The Collections Management guidelines will assist the museum with the orderly collection of artifacts and with their proper documentation. 

12. Policies and Procedures

1. The Museum Board should have knowledge of related government legislation.

The Historic Resources Act and Provincial Archives Act of the Government of Newfoundland and Labrador, as well as the Federal Cultural Properties Export and Import Act deal with the purchase and sale of nationally or provincially significant artifacts and with the ownership of archaeological material. The Copyright Act deals with the display and reproduction of art objects made by living artists.   

2. The Museum Board should prepare a **WRITTEN Collections Management Policy**. This policy will define:

- which artifacts the museum will collect*
- how objects will be acquired
- who will be responsible for accepting material into the collection
- how artifacts will be removed from the collection
- how the museum will document and care for the collection

** The Museum's Collections Management Policy should specify limits and priorities to the types or artifacts which will be collected. These limits should take into account the subject, geography and time period of the object's manufacture or use and should be consistent with the Museum's Statement of Purpose.*

3. The Collections Management Policy should be ratified by the Governing Body.
4. The Museum Board should review the Collections Management Policy periodically, in order to ensure that the policy remains appropriate given the Museum's Statement of Purpose and its resources.


5. The Museum Board should ensure that a **WRITTEN Collections Management Manual of Procedures** is developed and followed.

This manual will outline in detail the procedures to be followed when accepting an artifact into the collection, when recording the information about the artifact, and when numbering the artifact according to the museum's identification or accession system. (See sections 11, 12, and 13).


6. The Museum Board should ensure that **periodic inventories of the collection** are undertaken, in order to verify the accuracy of the museum's records, and to guard against the loss of any artifacts.
7. All aspects of the Collection Management Policy should ensure that it meets municipal, provincial and federal legislation and demonstrate a commitment to ethical behavior in collection development.

13. Documentation

As suggested, the Museum's Collection Management Manual should establish documentation procedures for artifacts accepted into the collection. The follow Guidelines outline particular points that should be covered by this Manual.

1. A unique number should be assigned to every artifact donated to or purchased by the museum. This number is known as an **accession number**.
2. Accession numbers should be attached or applied to each artifact in a consistent location, according to the artifact type. For example, accession numbers should be applied to the inside of the back left leg on every chair in the Museum's collection.
3. When an artifact is on temporary loan to the Museum, a loan number should be assigned to it using a numbering system parallel to the accession number system, but beginning with the prefix "L." This loan number should be marked on a tag, which is in turn, attached to the artifact.
4. Accession numbers should be applied to artifacts within the Museum's permanent collection with methods which are conservation approved and appropriate to the specific material of the artifact 
5. An accession record for each artifact should be completed in ink, typed and/or entered into a computer and a 'hard' copy created. This will provide an accession register which is a complete record of all artifacts in the museum's permanent collection. Similarly, a loan register should be kept to provide a complete record of all artifacts on loan to the museum. If your accession/loan register is on computer it is important to create a hard copy in the event that you computer data is destroyed or inaccessible.
6. As a safeguard against fire, a second copy of the accession and loan registers should be stored in another location within the community. Additional precautions can include storing collection records in a certified fire retardant safe.
7. A master file or accession file should be kept for each artifact. This file will summarize all of the following:
 - The information gained from the donor, from observation of the artifact itself, and from research undertaken about the artifact.
 - The location of the artifact, if the number of artifacts or the number of rooms in the museum warrant.

- The source of the artifact, including the name, address, and phone number and whether the artifact was donated or purchased.
 - Any **signed donor forms** or other proofs or legal title, such as a transfer of title or **bill of sale** that indicate the museum's legal ownership of the artifact. (see **Accessions, Deaccessions, and Loans**)
8. The Museum Board should ensure that an updated list is kept of all artifacts from the museum's collection on loan to other institutions.
 9. In cases where the Museum Board decides to remove an artifact from the museum's collection (that is to deaccession the artifact), complete documentation should be kept of the object and of the reasons for deaccessioning. (See section 12 for more details on deaccessioning procedures).
 10. The Museum Board should assign the task of documenting the museum's collections, or the coordination of this task, to a specific individual.
 11. The Museum Board should ensure that consistent terms are used in cataloguing the museum's artifacts.

The Museum Board should consider using the terminology developed by the Canadian heritage Inventory Network (CHIN), in order to ensure that the museum's documentation is consistent with other museums 

12. Collections management staff should be aware that different types of catalogue forms are used for archaeological, natural history and mineralogy collections.
13. The Museum Board should consider photographic documentation of each artifact. This can be very helpful in recording the condition of the piece, in serving as a record in case of theft, for use by researchers in promotional literature for the museum.
14. Museums or galleries with collections of art should keep artists' resumes on file.

14. Accessions, Deaccessions, and Loans

1. The Collections management manual should include written procedures for accessioning, deaccessioning and processing loans.
2. The Museum Board should ensure that **signed donor forms** or other proofs or legal title, such as a transfer of title or **bill of sale**, should be secured for each artifact accepting into the museum's collection.
3. The Museum Board should be cautious about accepting any donation of artifacts that has conditions attached. The donor might, for example, require that the artifact always be on display, or that they be displayed as part of a complete set of materials. It can often be found that, in the long run, the museum cannot meet these conditions while following accepted standards of exhibition or collection care.
4. The museum's donation forms should clearly indicate that conditions under which deaccessioning could occur and the procedures that would be followed, in order that potential donors are well aware of this policy in advance of their donation.
5. When an artifact is deaccessioned, the donor should be notified of this decision and of the steps taken, as a matter of courtesy.

It should be noted, however, that once donated, artifacts are the exclusive property of the museum. The institution is under no obligation to return the artifact to the donor if the artifact is deaccessioned.

6. The Museum Board should review the museum's collection to ensure that it follows the limits of subject, geography and time as outlined in the Collections Management policy.

If necessary, steps might be taken to deaccession artifacts which do not meet these guidelines. The Museum Board should consider offering these artifacts to another museum or similar institution, by exchange gift or private sale. Public auction may be another option for the disposal of the artifact, but this should be done only in exceptional circumstances and the original donor should be consulted.

MANL would strongly recommends that, except under the most extreme circumstances, artifacts should not be sold or exchanged to institutions outside the province.

15. Cataloguing

1. The Collections Management manual should detail the cataloguing procedure to be followed by museum staff. The cataloguing system used by the museum should allow for the ready retrieval of data.
2. The Museum Board should ensure that all artifacts in the museum's collection are catalogued as fully as possible, according to the procedures outlined in the Manual.
3. In order to ensure their "readability" over time, catalogue records should be written in ink, typed or entered into a computer database. As a safeguard against fire, a paper copy of all catalogue records or a back-up computer disc or external drive and stored in another location within the community
4. The Museum Board should ensure that particular individuals are delegated the responsibility of answering requests for information about the collections from the public. These people should be trained in the retrieval of catalogue data.
5. If the catalogue records include insurance valuations or other confidential information, they should be kept in a secure place where access is controlled, in part as a precaution against theft of objects known to be particularly valuable.
6. The Museum Board should ensure that provision is made for updating catalogue records should additional information become available or research be done.

When students or other researchers undertake research on the museum's collections or on themes relating to the Museum's Statement of Purpose, the resulting data should be added to catalogue records or cross-references made to appropriate separate files.

Museum staff should be particularly aware that museum visitors can often provide useful information about the collections. Every effort should be made to record this information and to add it to the museum's files.

7. The catalogue records should be cross-referenced with other records such as donor files, artist resume files and photo files.
8. Collections Management staff should be aware that different types of catalogue forms are used for archaeological, natural history, and mineralogy collections, since different types of information are relevant to the documentation of these collections.


Research

Research is a central function of a museum. It is a necessary underpinning to the development of a collection which has a rational basis in the museum's Statement of Purpose. It allows museums to create exhibits which tell a story based on the research of the museum and the related artifacts in the collection. It allows museums interpret and develop public programs which accurately reflect both the history of the artifact and the broader history which is outlined in the Museum's Statement of Purpose.

For this reason it is important that the Museum undertake its own research projects, and that it encourage and make use of research done by others.

These guidelines suggest some basic resources which are required to encourage research within the museum.

16. Research/Resource Centre

1. The Museum Board should promote research related to the museum's collections and to its theme as defined in the Statement of Purpose. This research can be undertaken by permanent project staff, by volunteers, by independent researchers or by students. The Museum Board should delegate the responsibility for encouraging research activities to a specific individual.
2. Where the museum is housed in an historic building, the prior history and use of the building should be researched and recorded.
3. Over the years, the Museum Board should ensure that a library of reference materials is built up for use in researching the collections and related aspects of the museum's theme.
4. Where possible, space should be made available in the museum for visiting researchers and for research work by staff.
5. During the cataloguing of artifacts, an effort should be made to research the artifacts, using the museum's research library. From time to time, special research projects should be undertaken.
6. Where possible, the museum's collections and reference library should be made available to visiting researchers by prior appointment.
7. Permission to handle artifacts should be granted only at the discretion of the museum's director or the president of the Museum Committee or Board.
8. Researchers should be supervised by a representative of the museum, and instructed to respect the condition, security and handling of artifacts.
9. Access by visiting researchers to confidential information concerning the value of the collections and the ownership of specific artifacts should be restricted.
10. The Museum Board should request that researchers acknowledge the museum as a source in their research.
11. The Museum Board should abide by copyright/reproduction guidelines. 
12. For oral history interviews, the Museum Board should draw up a Release Form for the donor to sign. This form will include the name and address of the informant, the date, and the subject matter of the interview. The form will also include a statement regarding permission for the interview to be used in print, film or tape. The informant must sign this form.

Care of Collections

These guidelines are intended to assist the Board of Directors in ensuring the best possible level of care for the museum's collections.

Through these guidelines, MANL would hope to preserve the integrity of the individual artifacts, and to ensure their long term survival, so that the material heritage housed in museum collections can be passed on to future generations. 📖

17. Conservation Standards

As stewards of a community's heritage, a primary function of museums is to ensure the continued preservation of their collection. Preservation decisions will affect most areas of museum operations as they pertain to the ways in which objects are collected, handled, transported, stored, documented, interpreted and exhibited. Museum governing bodies and staff must secure resources and training for the provision of appropriate conservation of their collection.

There are two basic approaches to conservation of collections – Prevention and Intervention.

- Preventive conservation delays the deterioration of an object by protecting it from physical and biological damage and by moderating the harmful elements of its environment. It involves controlling visible and ultraviolet light levels, maintaining favourable relative humidity and providing protection from insects and other pests.
- Interventive or Remedial conservation involves direct action such as cleaning or repairs to stabilize an object or slow deterioration. It can also involve an element of restoration for aesthetic or practical purposes. Remedial conservation should only be performed by trained individuals and performed by or under the supervision of a conservation professional.

Museums should focus on **preventive conservation** as this will inevitably protect collections from damage as well as from the costs of expensive conservation treatment.

Collection Surveys and Conditions Reports

It is important that museums understand the conservation requirements and physical conditions of their collections. To do this, museums should employ collection surveys and condition reports. Collection surveys will provide a general overview of the physical condition of your collection and therefore outline any conservation problems that need to be addressed. Condition reports provide detailed descriptions of an individual artifact's condition, these reports should be completed when an artifact is accessioned and should be included in the artifact's accession file. Condition reports should be completed or reviewed if an artifact receives conservation treatment or if an artifact goes on loan.

18. Conservation Policy and Procedures

All museums should have **WRITTEN Conservation Policy and Procedures**.


A conservation policy is an essential for ensuring the protection of a museum's collections. Without a conservation policy, museum's run the risk of losing important areas of their collection and misallocating their conservation resources. For many museums it is contained within the collection management policy, but in fact conservation will have an impact on all museum policies and procedures.

Museum conservation policies and procedures should:

1. state the general intent of the museum to maintain objects in a stable condition and to preserve the evidence that is contained in the objects through their construction, materials, fabric and evidence of their active life for the benefit of museum users.
2. state a commitment to ethical and legal standards in the conservation of their collections and to ensuring that the responsibility of care is delegated to trained staff and conservation professionals.
3. state a commitment to full documentation of the condition of artifacts in a condition report and include a schedule for creating these reports such as during accession and before and after an artifact is exhibited or loaned
4. state the museum's priorities for making decisions regarding preventive conservation and conservation treatment. This should include provisions for collection condition surveys.
5. a detailed description of measures to be taken, to prevent deterioration of their collections, particularly those damages that are caused by inappropriate handling, transport, storage and exhibit.

19. Artifact Storage

It is important that the Museum Board establish an artifact storage area. This space will allow for the rotation of the museum's collections, which will both lengthen the life of individual artifacts and maintain public interest in the museum by allowing for changing exhibits on display.

1. The Museum Board should delegate responsibility for the organization and monitoring of the artifact storage area to a specific individual.
2. When designing a storage area, adapting space to create storage, or when improving or changing existing storage areas, advice concerning all aspects of storage (including specific special requirements of the collections) should be sought from a trained Conservator. 
3. The storage area should be used for storage purposes only, and should not, for example, be combined with collections management or exhibit construction areas.
4. The museum's artifact storage should ideally be centralized in one area.
5. To protect against fire or water damage, all pipes, electric cables and ducts within the storage area should be protected, padded or insulated.
6. All sources of daylight should be eliminated. If the storage area does have windows they should be covered with blackout curtains or the window should be removed or boarded. Care should also be taken to insure that the window area is adequately insulated.
7. Any unnecessary doors should be eliminated in storage areas.
8. If possible storage in attic or basement areas should be avoided because of the risks of leaks or floods. If they must be used, the space should be checked regularly for leaks/risk of flood and preventative steps taken. Proper drainage should be ensured in basement areas. Attics should be insulated to prevent sudden temperature and humidity changes.
9. The storage area should be large enough:
 - To allow for storage shelves and cabinets;
 - To ensure that the artifacts are not crowded together;
 - To allow for the growth of the collection;
 - To enable easy access to artifacts.
10. All doors to and in the storage area should be large enough to accommodate the largest artifact in the museum's collection and the equipment used for transporting it.
11. The floor loading of the storage area should be tested to ensure that it can safely accommodate the weight of the furnishing and artifacts.

12. Fire regulations for the storage area should consistent with rest of the building.
13. No food or drink should be permitted in the storage area.
14. High quality, pick-resistant, impact-resistant locks should be installed on all doors and windows.
15. The number of keys to the storage area should be strictly controlled.
16. A security book should be maintained to keep a record of all entries into the storage area.
17. The storage area should not be used for traffic to another part of the museum.


20. Storage Furnishing and Storage Procedures


1. A plan of the storage area lay-out should be posted.
2. As a protection in case of flooding, the lowest shelves containing artifacts should be a minimum of 10 cm (4 inches) off the floor, and all artifacts not in cabinets or on shelves should be raised off the ground by pallets or blocks that are padded and covered with an inert material.
3. A space should be provided for air circulation between storage shelves or cabinets and the exterior walls and ceiling.
4. The aisles in the storage area should be wide enough to allow for the easy movement of artifacts and moving equipment. Bottlenecks or sharp corners should be avoided.
5. The artifacts should not be stored so high as to be at risk of being dropped and causing damage either to the artifacts or staff when they are taken down.
6. Temporary holding areas and work-space should be available, for packing and documenting the artifacts.
7. Items should be arranged in the storage area first according to material, then by size.
8. All boxes and other artifact containers should be labeled on the outside with light and water-resistant ink, listing artifact types and accession number.
9. In order to minimize the risk of fire, potentially flammable artifacts such as cellulose nitrate films and biological material preserved in spirits should be isolated from the rest of the collection. If you do have these types of materials in your collection you should consult a conservator to provide safe and appropriate storage advice.
10. Cabinets and shelving should be clearly numbered and labeled, and this location information cross-referenced with the artifact catalogue and files.
11. A system, such as artifact removal cards, should be established for marking the space when artifacts are legitimately removed from storage.
12. The artifacts should be supported to prevent accidental movement or shifting.
13. Acid-free padding/packing material should be used in wrapping the artifacts.
14. Artifacts should be stored in their natural position or that which is most stable.
15. Soft objects, such as hats or shoes, should be padded out for support.

16. Large objects and those on open shelving should be protected from dust by polyethylene sheeting. As it is important to allow air circulation, such sheeting should not be used to seal the shelving.
17. As a protection against potential leaks, no artifacts should be stored on top of cabinets or on top shelves.
18. Unless for specific conservation situations (i.e. use of microclimates), the air should be allowed to circulate freely in order to avoid mould problems.
19. The storage shelving and cabinets should not be harmful, chemically or physically, to artifacts. Artifacts should be protected from wooden shelving/cabinets by the use of latex paints and by padding surfaces with inert materials.
20. Documents should be stored in acid-free archival boxes, envelopes or folders.
21. All easily portable objects with high monetary value should be locked in a safe or safety deposit box. The preservation requirements for these items will need to be considered and climatic controls may be necessary. This space should be dedicated for artifacts only.
22. A separate storage area should be established for the museum's study/or education collection, as this collection should be more readily accessible for use.

21.Storage environment

1. The Museum Board should seek professional advice concerning the conservation-related storage requirements of their collection.
2. The Museum's storage area should be equipped with a thermometer and a hygrometer so that the temperature and humidity can be monitored and recorded at regular intervals.

An environment monitoring kit can be borrowed on a short term basis from the Canadian Conservation Institute, at a small cost. Some equipment can also be borrowed from The Rooms Provincial Museum. 

3. The individual responsible for the artifact storage area should arrange for the periodic calibration or verification of this environmental monitoring equipment.
4. Insulation and draft-proofing should be installed to buffer against environmental changes throughout the museum building. If this is not feasible, the Museum Board should consider insulating the exhibit and artifact storage areas.
5. When environmental levels cannot be controlled in the exhibit and storage areas, microclimates should be created to protect particularly sensitive artifacts, using environmentally-controlled, sealed cases.
6. All storage areas should have a regular schedule of thorough housekeeping and maintenance.
7. In order to protect the museum's collection against an infestation and mold, all new artifacts should be isolated from the rest of the collection and inspected. If it is not possible to isolate the artifact in a separate room, the artifact should be wrapped in polyethylene until it can be inspected. If you suspect an infestation consult a conservator for advice on treatment and storage.
8. The museum staff should undertake regular, periodic inspections for signs of infestation in all collections and all areas containing collections.
9. If the storage area is lighted by fluorescent lights, these should be tested for ultra-violet radiation emissions. If they are found to be above 75 microwatts/lumen, filter sleeves or diffusers should be installed. Again, this testing equipment can be borrowed from the Canadian Conservation Institute or The Rooms Provincial Museum. 
10. Lights should be kept off in the storage area, except when it is being used by staff.

11. If the storage room lighting is incandescent the light levels in storage areas should be kept at or below 150 lux. A lux meter can be borrowed from the Canadian Conservation Institute or The Rooms Provincial Museum. If lux levels are found to be too high, lower wattage bulbs can be installed or the light screened from the artifacts. Artifacts with high sensitive should be kept in darkness whenever possible.
12. Electromagnetic discs or tapes, such as computer, video and audio tapes, should be protected from proximity to steel or other potential sources or magnetic interference.

22. Security

1. The Museum Board should create a **WRITTEN security policy**. This policy should:
 - assess the security risks for the museum
 - establish security procedures
 - require staff training with regards to security
 - make recommendations regarding the installation of appropriate security equipment
2. The Museum Board should delegate responsibility for overseeing security to one person.
3. High quality, pick-resistant, impact-resistant locks should be installed on all doors and windows.
4. There should be strict control of access to non-public areas in the museum, such as the artifact storage and office areas. A logbook should be used to record all visitors to non-public areas.
5. Keys to artifact storage areas should be in the care of a few designated people.
6. All easily portable objects with high monetary value should be kept in a safe or safety deposit box.
7. Access to confidential information, such as the value and ownership of the artifacts, should be controlled.
8. Written procedures for dealing with emergencies should be prepared. Staff training should include knowledge of these procedures.
9. The Museum Board should ensure that a cloak room is available for the use of museum visitors. In order to protect against theft and accidental damage to the artifacts, museum visitors should be asked to leave parcels, large bags, umbrellas, etc. in the cloak room.
10. Notices which ask the public not to touch the artifacts should be on display in the museum. These notices should tactfully explain why this request is made.
11. As a protection against the possibility of theft and vandalism, the Museum Board should ensure that sufficient staff is on duty during open hours to monitor visitors in each area of the museum. Staff training should include appropriate procedures for monitoring visitors and for dealing with any incident that might arise.

12. Routine checks of the artifact on display should be undertaken to ensure prompt notice of any damaged or stolen artifacts.
13. The museum's exhibit cases should be locked or secured.
14. Artifacts not protected by cases should be secured. Small artifacts can be secured by tying them down with unobtrusive monofilament (clear fish line) – padded out at the point of contact with the artifact. Rope or similar barriers can be used to distance larger artifacts from the visitor.
15. As food and drink can attract insects and can be accidentally spilled, causing damage to artifacts. Food and drink should be prohibited in areas with artifacts.
16. A WRITTEN daily closing/opening routine should be prepared. This should include an indication of the people who are responsible for keys to the building.
17. The building exterior and grounds should be inspected for potential security risks on a regular basis, both during the museum's open season and during the winter months.
18. In order to ensure the safety and security of the artifacts, researchers should be supervised by a representative of the museum, and permission to handle the artifacts should be granted only at the discretion of the museum's director or curator.
19. A record should be kept of researchers given access to artifacts and of the artifacts they are given access to. Each artifact should be checked and noted before the researcher leaves.
20. The museum should have an up-to-date list of emergency telephone numbers posted in the museum (police, fire, doctors, ambulance, conservation advice) in the event of emergency.

23. Environmental Control and Monitoring of Exhibit Areas

The Museum Board should be aware that environmental monitoring kits can be borrowed on a short term basis from the Canadian Conservation Institute, at a small charge. The Rooms Provincial Museum is also able to lend some types of monitoring equipment. Some basic equipment such as thermometers and humidity readers can be purchased at a nominal cost.

Advice regarding conservation is readily available from The Rooms Provincial Museum, the Canadian Conservation Institute and MANL. ☞ ☞ ☞

1. The Museum Board should delegate the responsibility for monitoring and recording environmental conditions and making recommendations for improvements or changes to a specific individual.
2. Mats or grills should be placed outside the museum's entrance to reduce the amount of dust and dirt entering the building.
3. The Museum Board should ensure that in all areas containing artifacts:
 - temperature and humidity are monitored and recorded at regular intervals.
 - insulation and draft-proofing should be installed to buffer against environmental changes throughout the museum building. If this is not feasible, the Museum Board should consider insulating the exhibit and artifact storage areas.
 - when environmental conditions cannot be controlled in the exhibit and storage areas, microclimates should be created to protect particularly sensitive artifacts, using environmentally-controlled, sealed cases.
 - environmental monitoring equipment is periodically calibrated or verified.
 - lights are kept off unless the space is being used by staff or the public.
 - the lux level of daylight in display areas is monitored and if found to be too high, is reduced through the use of curtains, blinds, or similar material in keeping with nature of the building.
 - lux levels from incandescent lights are monitored and kept at recommended levels specific to the materials in the artifacts. The intensity of the light can be reduced through the use of lower wattage bulbs or by screening the artifacts from direct light.

- levels of ultra-violet radiation from florescent lights and windows should be measured and kept or below 75 microwatts/lumen. Ultra-violet screens on windows and filters on fluorescent light fixtures can be used to reduce these levels.


24. Pest Control.


It is recommended that museum take an Integrated Pest Management approach to controlling pests in the museum environment. Effective IPM programs prevent and reduce pests through minimizing those elements essential for pest survival (e.g. food, moisture and habitat). IPM aims to prevent pest problems from occurring as well as reducing the use of toxic materials that may adversely affect the environment and the materials in museum collections.

1. The Museum Board should ensure that both paid staff and volunteers are trained in recognizing signs of insect and mold infestation in the museum building and in the collection.
2. In order to protect the museum's collection against an infestation and mold, all new artifacts should be isolated from the rest of the collection and inspected. If it is not possible to isolate the artifact in a separate room, the artifact should be wrapped in polyethylene until it can be inspected. If you suspect an infestation consult a conservator for advice on treatment and storage. Items that are infested, or suspected to be infested, should never be stored with artifacts in storage or on exhibit.
3. All indications of past or present active infestation and any treatment should be noted on the condition report related to that object.
4. The Museum Board should ensure that regular periodic checks are undertaken for signs of infestation in all of the museum's collections and all areas containing collections.
5. Good building maintenance is important in the prevention of pests. Museum's should ensure that:
 - proper environmental controls are maintenance throughout the museum.
 - food and drink are confined to designated areas and that garbage is removed from the museum on a daily basis.
 - proper maintenance of the building and grounds is performed including inspection of the exterior where pests, such as rodents or birds may enter.
 - doors and windows are kept closed at all times, or screen doors and windows are used.
 - regular inspection of the interior and the use of monitoring equipment such as insect traps.
 - water leaks are detected immediately.
6. If treatment for pests is required, the Museum Board should ensure that staff are informed of possible hazards of the treatment and take recommended precautions when dealing with toxic pest control substances. As certain pest control substances can damage museum collections it is recommended that a conservator be consulted regarding pest control options.

25. Artifact Handling and Care

1. The Museum Board should ensure that a **WRITTEN Collections Care policy** is included as part of the Collections Management policy.
2. The Museum Board should delegate the responsibility for ensuring the proper care of the museum's artifacts to one individual and provide that individual with appropriate training. Nevertheless, all staff should be expected to assume a responsibility for ensuring the day-to-day care of the museum's collections.
3. The Museum Board should ensure that a manual of procedures for handling the museum's artifacts is prepared, and that copies are circulated and training undertaken for all members of staff.
4. Museum Staff should follow the general rule that artifacts should be handled as little as possible.
5. Collections management staff should apply or attach accession numbers to the artifacts using methods which are conservation-approved and appropriate to the material of the specific artifact.
6. When artifacts are moved within the museum building, they should be placed on trolleys or trays with packing and/or support sufficient to prevent damage.
7. Artifacts should be handled with clean hands. However, when metals, textiles, photographs, negatives, papers and other sensitive materials are handled, clean cotton gloves should be worn as an extra precaution against possible damage from the normal dirt and oils in hands.
8. Staff members should be provided with and should be required to wear protective clothing when handling biological collections treated with potentially harmful preservation compounds.
9. When artifacts are handled they should be properly supported and not moved or picked up by handles or other weaker parts of the object.
10. In cases where artifacts are to be transported over any distance away from the museum, professional advice should be sought or research done to determine specific handling requirements.

11. When artifacts are being transported outside the museum, they should be hand carried by trained museum staff or transported by a specialized carrier firm whenever possible. The artifact should be packed for protection against accidental movement, breakage, vibration, and climatic fluctuation.
12. If exhibits are constructed and produced in the museum itself, the work-space should be separate from the artifact display and storage areas. If renovations are being done on the exhibit rooms, the artifacts should be removed or otherwise protected while the work is being done.
13. The Museum Board should consider establishing an education collection of artifacts which could be handled more actively by museum staff and the public than the museum's permanent collection. Education collections should be made of artifacts which are duplicates of artifacts in the permanent collection, are easily replace or are particularly durable. Replicas can be also used for this purposed.
14. An artifact should not be included in the education collection unless the possibility of its damage or loss is considered by the Museum Board and the artifact is deemed to be expendable. Nevertheless, both artifacts within the education collection and replicas should be treated with a reasonable standard of care. Similarly, original photographs and documents can be reproduced for exhibition of educational purposes. The originals should be treated as unique artifacts and cared for accordingly.
15. Exhibits involving artifacts in active use should be operated within public safety regulations and without detriment to the museum's environmental conditions.
16. Artifacts must not be jeopardized by use unless working parts that wear out (i.e. machinery) can be replaced or fabricated.
17. When the Museum Board wishes to respond to a request for a copy of a photograph, the following procedure should be followed:
 - Ensure that the museum has permission to copy the photograph. See current copyright legislation. 
 - A copy should be made from the original photograph. This can be done by either scanning the photograph or creating a copy negative from which prints can be made.
 - Once a copy has been created from the original, a copy should be stored with the proper identification so that a copy is now available for future researchers and exhibits and the original can be permanently stored for preservation.

The appropriate care, handling, copying and identification of photographs are important for their long term preservation as the preservation of the information they contain. A museum with a large number of photographs may require specialized information that can be obtained From the Archives Association of Newfoundland and Labrador (ANLA). 

18. Treatments

1. While Museum Staff should undertake the normal cleaning, such as dusting, of the museum's collection, a more thorough cleaning of artifacts should be done only by a professional conservator, or following professional advice.

Normally, an artifact will be cleaned only if the artifact is in jeopardy, or in rare cases for aesthetic reasons. Cleaning is never undertaken when it interferes with the artifact's historic integrity or physical state.

2. The repair or treatment of an artifact should only be performed by a professionally trained conservator or under their direct supervision.
3. The repair or treatment of artifacts on loan should be attempted only with the expressed, written permission of the owner, and again only by a trained conservator.
4. When an artifact is repaired, full written documentation should be kept of all treatments in the form of a treatment report prepared by a trained conservator. In addition, pre-treatment and post-treatment photographs should be taken.
5. All cleaning methods used should be conservation-approved, In order to ensure the treatment's safety on a given artifact, a pre-test should first be undertaken on a small area of the artifact.
6. All substances applied to artifacts must be conservation-approved.
7. Methods of applying or attaching artifact accession numbers must be conservation-approved and appropriate to the specific materials of the artifact.
8. Any parts or pieces detached from artifacts through cleaning or treatment should be retained. In addition, the piece should be identified with the same accession number as the artifact, followed by a letter to indicate that it is part of a larger object. A report with regards to this damage should be made in the artifact's catalogue record.

Exhibits

The exhibits are the most important means by which the museum fulfils its function of informing and entertaining the public.

The museum visitor may not see the other parts of the museum's operations. Most typically, they will gain their first and most important impression of the institution, in the exhibit areas. The quality of the displays, the evidence of careful maintenance, and the professionalism of the museum's interpretive staff are, thus, particularly important elements of the museum's work.

19. Exhibition Policies and Procedures

1. A good exhibit plan must take into account a whole range of concerns including security, conservation of the artifacts, use by school groups, the potential for related special events, and accuracy of the information. Exhibits should be developed by a committee of people representing a broad range of skills.

Nonetheless, the Museum Board should delegate the overall responsibility for exhibit development and coordination of the exhibit team to a single person.

2. The museum Board should ensure that both permanent and temporary exhibits are relevant to the Museum's Statement of Purpose.
3. Exhibits should be based on careful research both of the artifacts on display and of the relevant historical information.
4. When a museum is involved in temporary exhibits or special events, a regular schedule of activities should be published in order to promote the events to the public.
5. In planning an exhibit, a comprehensive exhibit plan should be developed which includes the exhibit text, list of artifacts, floor plan and all of the information required for the production of the exhibit.
6. Every effort should be made to anticipate and to accommodate the needs of museum visitors with various physical challenges.

This should include attention to visual and hearing impairments as well as mobility problems. The exhibit team should, for example, consider locating the exhibit areas on the ground floor of the building, allowing sufficient space to accommodate wheelchairs, using large type size for exhibit text, supplementing guided tours by staff with an exhibit catalogue.

7. All artifacts on display should be accurately identified though an exhibit label.


In some cases, bilingual or multilingual labeling or exhibit catalogues in relevant languages should be considered.

Any reproductions of artifacts used for display purposes should be labeled as such.



8. Regular condition checks should be made of artifacts on display, both as a precaution, in case of theft, and as a means of detecting any damage which might occur.
9. The location of each artifact on display should be noted in the artifact's file.

10. The Collections Management staff should develop a procedure for recording the removal of particular artifacts from display. This allows other museum staff to locate items on exhibit.
11. Light levels in display areas, from both windows and light fixtures, should be sufficient for public safety. However, light levels should also be in accordance with the recommended conservation standards for the materials on display.

The intensity of daylight in display areas should be monitored and if found to be too high, should be reduced through the use of curtains, lace, blinds, or similar material in keeping with the nature of the building.

The intensity of light from other sources should be monitored and, if necessary, reduced through the use of appropriate wattage bulbs, or by screening the artifacts from direct light. For advice consult a conservation professional. 

12. Levels of ultra-violet radiation from both light fixtures and windows should be measured and kept at or below 75 microwatts/lumen. Ultra-violet screens on windows and filters on fluorescent light fixtures can be used to reduce these levels.
13. The Museum Board should ensure that in all areas containing artifacts temperature and humidity are monitored and recorded at regular levels.
14. When environmental levels in the exhibit space cannot be controlled, microclimates can be created in sealed exhibit cases as a means of protecting particularly sensitive artifacts.

Advice about the construction of such cases can be obtained from MANL, or the The Rooms Provincial Museum 
15. When display cases are lit by fixtures inside the case, the lighting apparatus should be sealed off from the rest of the case and well ventilated in order to avoid the possibility of heat build up in the case. For advice consult a conservation professional. 
16. Exhibit cases should be kept clean and free from dust, through regular housekeeping of the exhibit areas.
17. The artifacts on display should be mounted in such a way as to ensure that they are stable and are not physically altered or damaged.
18. All materials that house or support artifacts must comply with conservation standards for artifacts on display.

19. Artifacts should not be crowded together in a display. Crowding can easily lead to accidental damaged if one object falls on another. In addition, visitors will find it difficult to view individual artifacts carefully when they are displayed too closely together.
20. Exhibit cases should be locked or secured. At the same time, the exhibit cases should also be constructed in a way that will allow staff reasonable access to artifacts on display.
21. The exhibit should be arranged in a manner that will allow easy traffic flow and avoid congestion, for the safety of both the public and the displays.
22. The height, size and placement of exhibit texts and labels should be planned to allow easy visibility for a variety of visitors, including children, those with impaired vision or mobility as well as adults.
23. Food or drink should not be permitted in display areas.
24. Notices should be on display in the museum which ask the public not to touch the artifacts, and which tactfully explain why this request is made.
25. In order to ensure the security of the artifacts, the exhibit areas should be under supervision at all times during open hours.
26. Photography by museum visitors can create some difficulties. Tripods can trip up other museum visitors, and the excessive use of a camera flash can damage sensitive artifacts. With this in mind, visitors should be expected to request permission prior to photographing the museum displays; and museum staff should be provided with a policy regarding photography in the museum.
27. As damage to museum artifacts is most often caused through day-to-day handling, all personnel working with or around exhibited material should be trained in artifact handling procedures and general care consideration.
28. Regular conditions checks should be made of all exhibits and public areas, to ensure that the museum meets acceptable standards of conservation, cleanliness and repair.
29. The Museum Board should delegate the responsibility for maintenance of the exhibit to one person.

Similarly, the responsibility for routine housekeeping of the exhibit areas should be delegated to a single person, though they may want to enlist the help or supervise the work of other staff members. For example, housekeeping duties are often the responsibility of summer interpretive staff. A schedule and plan for cleaning should be established.

30. A regular schedule should be followed in reviewing the exhibits for damage, and undertaking routine display maintenance.
31. If exhibits are constructed and produced in the museum itself, the work-space should be separate from the artifact display and storage areas.

If renovations are being done on the exhibit rooms, the artifacts should be removed or otherwise protected while the work is being done.
32. Exhibits involving artifacts in active use should be operated within public safety regulations and without detriment to the museum's environmental conditions.
33. For institutions with a constantly changing schedule of travelling exhibits, there must be preparation and storage space sufficient for at least one incoming and one outgoing exhibit to be housed at the same time.

Interpretation and Public Programs

Interpretation and public programs are the principal means by which museums can enhance the effectiveness of their exhibits. Interpretation includes, but is not limited to, the information provided on artifact labels and exhibit panels, as well as the tours provided by the museum staff. As part of the interpretation efforts of the museum, public programs educate and engage the museum audiences. These programs can take a variety of forms – from an exhibit catalogue to a tour of the museum for a bus group to a weekend folk festival. What they have in common are the two ingredients – people and activity – brought together with the goal of providing museum visitors with a greater understanding of the Museum’s collections and of the themes which are embodied in its Statement of Purpose.

These guidelines suggest options that might be tried in planning interpretation and public programs, warn against problems which are commonly met and suggest some solutions.

The possibilities for interpretation and public programming are limited only by your imagination.

20. Interpretation and Public Programming Policies and Procedures

1. Museums should develop a **WRITTEN Interpretation and Public Programming Policy** to provide direction and a framework for the museum's exhibits and public programs. These programs should be planned cooperatively between the Museum Board and Staff.
2. This Policy should require that interpretation and public programming efforts:
 - relate to the museum's Statement of Purpose;
 - enhance the public's understanding of the museum's collections;
 - do not present risks to artifacts, to museum building, to museum staff or to visitors;
 - include a variety of programming for various age groups and interests
3. The Museum Board should ensure that interpretation and public programming is developed to enhance the public's experience in viewing the museum's collection of artifacts. This policy could target specific groups or events, for example, programs for schools, seniors, community organizations or special festivals.
4. Ideally, the museum would offer a variety of public programs during the year. These could focus on the museum's permanent exhibits or on a special, temporary exhibit.
5. Ideally, the museum would offer a variety of public programs which would be suited to the museum's varying audiences, including school or youth groups, teenagers and adults, tourists and residents of local communities.
6. The Museum Board should delegate responsibility for public programming to one specific person. Ideally, this person should have a good knowledge of the museum's collections and strong teaching skills.
7. The Museum Board should ensure that hospitality and public presentation training is provided for all staff involved in day-to-day dealings with the public and with public programming events. The Museum Board should also ensure that sufficient training is provided for museum interpreters or other guides to ensure that they present only valid information or have the ability to readily locate it.
8. The Museum Board must ensure that the interpretation and public programming policy demonstrates a commitment to accuracy and objectivity in interpretation and public programs and demonstrates a commitment to ethical behaviour.
9. Interpretation and public programs must meet municipal, provincial and federal legislative requirements (e.g. copyright).

10. Interpretive and public programs must be based on realistic and attainable goals, that is, on the material, financial and human resources available to the museum. Museum Boards must ensure that the museum staff has a sufficient background and appropriate skills to develop and carry out such programs.
11. Museums must ensure that they source and allocate funding in their annual budget for interpretive and education programs. This should include all related operation expenses such as exhibit, events and activities, advertising and publicity, and conservation.
12. As part of the Interpretive and public programs, museums should implement a procedure for the assessment and evaluation of these programs which will allow for changes, additions, or deletions. This will require clearly defined and measurable learning objectives and outcomes.
13. When it is difficult to offer special programs within the museum itself, the Museum Board could consider holding special events or temporary displays in other community locations.

21. Publications, Public Relations and Publicity

Museum's face numerous challenges in attracting visitors. With a public that have increasingly busy lives, and strong competition for their entertainment and leisure hours, museums must not only find ways to communicate and engage with their community, but demonstrate how the museum is relevant to their lives and identity as a community and individuals. Without good public relations and communications, the community cannot know what the museum has to offer.

1. The Museum Board should establish beneficial relationships with the museum's local community groups. This might, for example, include offering special museum tours for youth groups, asking the senior citizens group to assist with a special program, offering to cooperate with a group in mounting a display at the museum, or inviting a representative of an affiliated group to serve on the Museum Board.
2. The Museum Board should delegate the responsibility for public relations and all promotional material to one person.
3. The Museum Board should ensure that some form of promotional material is produced which advertises the institution and its exhibits and, if appropriate, its temporary exhibits and special events. This may include:
 - developing signage and placing it strategically throughout the community and surrounding areas.
 - developing a website for the museum.
 - developing virtual exhibits.
 - developing pamphlets and placing them strategically locally, regionally, provincially and nationally.
4. The Museum Board should ask the local media to assist in the promotion of the institution, as well as of individual programs and exhibits.
5. Museum Boards should seek partnerships with other local groups and organizations that create cross promotion opportunities.
6. The Museum Board should develop an archive which documents all its publications, publicity events and press releases, and similar materials.
7. The Museum Board should ensure that all promotional and public relation activities are accurate and ethical.
8. The Museum Board should periodically evaluate the effectiveness of its publicity and public relations efforts.

22. Inquiry Services

1. The Museum Board should prepare a WRITTEN policy which includes procedures for dealing with requests that the staff identify or evaluate objects in private collections.
 - Because of the possible financial implications for the owner, if the museum does decide to identify an object, such identification should include a written disclaimer stating that the institution and its staff provide an option only and cannot be held responsible for any error.
 - If an item is left at the museum for identification it should be tagged, recorded, safely store, covered by insurance and covered by a release form or receipt signed by the owner and a staff member.
2. All inquiries for information, and particularly those regarding the museum's collection, should be directed or delegated to the person most qualified to deal with them.
3. The Museum Board would be advised not to provide appraisals for artifacts in private collections. Instead, people making such inquiries should be referred to antique dealers.
4. In dealing with inquiries involving artifacts in the institution's collection, care should be taken to protect confidential information about the value or ownership of particular artifacts.
5. The Museum Board should make arrangements for someone to answer general inquiries such as directions, and general museum information such as opening hours and current exhibits, both during the museum's open season and during winter months.
6. All staff should be made aware of the necessity of dealing with any and all inquiries with politeness and attention to maintaining good public relations.

Staff training should be undertaken in order to establish the museum's expectation of its staff in this regard, and to provide staff with the opportunity to improve their skills in dealing with the public.

7. A record should be kept of all requests for information received by the museum.

Such a record could be very useful in planning for the resources needed by the museum in order to meet such requests from the public.

Resource List

Resource List:

Where appropriate, write in your local telephone numbers.

Museum Management

All aspects of museum operations:

- Museum Association of Newfoundland and Labrador (MANL) 726-9034
- The Rooms Provincial Museum 757-8020

Collection Management

Advice related specifically to Collections Management and standard terminology for artifact documentation:

- The Registrar, The Rooms Provincial Museum 757-8027
- Canadian Heritage Information Network 1-800-520-2446
<http://www.chin.gc.ca>
- Department of Tourism Culture and Recreation
Provincial Heritage Legislation, including the Historic Resources Act
<http://www.tcr.gov.nl.ca/tcr/> 729-0862
- *Federal Cultural Properties Export and Import Act* (819) 997-7761
Canadian Cultural Property Export Review Board
www.canadianheritage.gc.ca/progs/cebc-cperb/index_f.cfm
- *The Copyright Act*
Intellectual Properties Directorate (613) 952-6179
<http://strategis.ic.gc.ca/epic/site/ippd-dppi.nsf/en/Home>
- The Archive Association of Newfoundland and Labrador (ANLA) 726 2867

Care of Collections

Advice related specifically to Care of Collections and conservation approved procedures, disaster planning:

- The Conservator, The Rooms Provincial Museum 757-8123
- The Canadian Conservation Institute 1-866-998-3721
<http://www.cci-icc.gc.ca/>

Employment Legislation

Advice related specifically to employment legislation

- *Occupational Health and Safety Act,
Provincial Employment Legislation*
Department of Human Resources Labour and Employment 1-877-729-7888
<http://www.hrle.gov.nl.ca/hrle/>
- *Federal Employment Legislation*
Human Resources and Social Development Canada 1-800-563-5677
<http://www.hrsdc.gc.ca/en/labour/index.shtml>
- *WHSCC – Workers Health and Safety Compensation
Commission* 1-800-563-9000
<http://www.whscc.nf.ca/>

Historic Buildings

Advice related specifically to buildings

- *Designation of buildings as heritage structures, and appropriate standards of
maintenance and restoration of historic buildings.*

The Heritage Foundation of Newfoundland and Labrador 1-888-739-1892
<http://www.heritagefoundation.ca/index.html>
- *The Newfoundland Historic Trust* 709-739-7870
<http://www.historictrust.com/>
- *National Building Code of Canada*
http://www.nationalcodes.ca/nbc/index_e.shtml

Also see your local municipality

Health and Safety

Advice related specifically to health and safety standards

- *Provincial Health and Safety Standards*
Department of Human Resources Labour and Employment 1-877-729-7888
<http://www.hrle.gov.nl.ca/hrle/>

- *Fire Code, Hazardous Chemicals...*
Your Local Fire Department _____

- *Police*
Your Local RNC or RCMP Detachment _____

- *First Aid and CPR training*
These offices can put you in touch with a local person who is qualified to meet your training needs.

St. John Ambulance Association 757-3382
<http://www.sja321.ca/>

Canadian Red Cross, Newfoundland 758-8400
<http://www.redcross.ca/article.asp?id=006121&tid=064>

St. John's 758-8400

Grand Falls-Windsor 489-5522

Corner Brook 634-4626

Labrador City 944-2570

Signage

- *Provincial Highway Signage Legislation*
Department of Transportation and Works (709) 729-2300
Newfoundland Provincial Government
<http://www.tw.gov.nl.ca/>

- Municipal Signage Regulations : Consult your local council.

Food Services

Advice related specifically to food services

- Department Government Services - Food Establishment Licence
Newfoundland Provincial Government 729-2008
<http://www.gs.gov.nl.ca/>

Additional References of Your Choice:

The Checklists

Before you Begin:

1. The Checklists repeat the Guidelines in summary form. They are intended to help you make notes about your thoughts as you work through each of the Guidelines – so keep the two sections of the document side-by-side as you work.
2. Please plan to photocopy the original checklists and to use this copy for your note taking. Ideally, the checklists will be update each year and be used as a very practical guide for each year's plan of action.
3. Over the years, these checklists will help you review your progress in improving your museum's operations. You will note that each sub-section of the Checklists begins with a place to mark the initials of the person who has completed the review and the date. These notations should help the Museum Board retrace its work from year to year.

How to complete the Checklists:

1. Begin by assessing the current state of your museum's operations, point-by-point. You will find that some guidelines are not appropriate (n/a) to your situation; others you will mark "yes" or "no."

With a few crucial guidelines that involve public safety or financial liability, you will note that the checklists indicate that "not appropriate" is not a reasonable option.

2. Summarize the work to be done in the "Comments and Recommendations" section.
3. Consider what resources are available to you in terms of money and "people power."
4. Assess the level of risk related to certain guidelines. Common sense suggests that compliance with regulations, health and safety matters and the overall care of the museum's collection of artifacts should be given a priority.

For example, public liability insurance and attention to fire codes are absolutely mandatory. Similarly, guidelines relating to threats to the entire collection such as fire and, in some cases, flood, broken windows and leaking roof should be dealt with on an urgent basis.

5. Assess the value of your artifact collection. Some pieces might be one-of-a-kind, of unique significance to the province's history or they might have a particularly high monetary value. Again, close attention to these should be given priority.

6. Review the overall vision of your Museum Committee.

You may, for example, have chosen to serve as a research resource to your own community rather than providing a tourism attraction. As a result the purchase of reference books or the development of an oral history project may take precedence over a new brochure describing the location and services of the museum or a special summer festival.

7. With these thoughts in mind, you can begin to develop a priority list of things to be done.

Short list the most critical tasks on the Checklist summary forms.

You might then want to pencil in numbers, ranking each task in order. (Keeping in mind that these numbers will likely change as certain opportunities come your way - a new funding program, an unexpected offer for help from a new volunteer).

From these notes you will be able to draft a plan of action for the current year – and for a number of years to come.

Responding to each of the Guidelines will take a great deal of ongoing work. While we all know that our funds are low, and that staff and volunteer time is limited, MANL hopes that the planning involved in working through the Guidelines will help each Museum Board use the resources that are available to it in the manner that best reaches its particular goals.

1. Working with a Vision

1. What resources are available to your museum and to your community?

Will you plan to highlight a unique collection of artifacts? A significant heritage building? Interesting landscape features or natural resources? An important historical event or interesting person? A special tradition such as boat building or signing? Or a unique cultural tradition – Scottish, Micmac or other?

2. What kind of visitors do you wish to attract to your museum and what are their special interests?

Tourists from Eastern Canada or from Europe, for example, who might need translation services? Bus tour groups who might require more space in the exhibit areas to assemble for group tours? Children who might benefit from special exhibits geared to their learning levels?

3. What resources and services are available in your community or region that might impact on the role that your museum should play? Are there opportunities for cooperation, or for dividing the labour so that each group plays a unique role?

For example, is there another museum in the area? What thematic focus does it have? Does your museum have a different theme or a special approach to public programming that proves it with a special role in serving the public?

Is there an art gallery or genealogical society in your area? Is the town council interested in developing heritage themes or resources in the community at large?

4. What are the special interest of your Governing Authority? Research? Programming for children? Preserving an important collection artifacts?

5. Do you think of your museum as:

- | | |
|---|--|
| <input type="checkbox"/> Tourism Attraction | <input type="checkbox"/> Cultural Centre |
| <input type="checkbox"/> Educational Resources | <input type="checkbox"/> Research Centre |
| <input type="checkbox"/> Centre for Heritage Activism | <input type="checkbox"/> Other? |

2. Governing Body

Date _____ Initials _____

- | | Y | N |
|--|--------------------------|--------------------------|
| 1. Is the Governing Body of the museum legally incorporated? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Does the museum have a written constitution? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Does the Museum Board report on a regular basis to the Governing Body? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Has the Governing Body approved all policies developed by the Museum Board? | <input type="checkbox"/> | <input type="checkbox"/> |

Comments and Recommendations:

3. The Museum Board

Date _____ Initials _____

- | | Y | N | N/A |
|---|--------------------------|--------------------------|--------------------------|
| 1. Does the museum's constitution require a Regular schedule of meetings of the museum's Board of Directors? | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. When new members are recruited to join the museum's Board of Directors, are they given an orientation (roles, responsibilities, liabilities, training, terms of office, etc.)? | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. Does the museum have a written Statement of Purpose? | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. Does the museum have a code of ethics to guide the behavior of committee members, staff, and volunteers? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Does the Museum Board submit a written annual report which summarizes the museum's activities for the year to the Governing Authority? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Does the museum have a written long term development plan? Strategic plan? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Comments and Recommendations:

4. Finances

	Date _____	Initials _____	
	Y	N	N/A
1. Does the Treasurer monitor the finances of the museum on a regular basis?	<input type="checkbox"/>	<input type="checkbox"/>	
2. Does the Treasurer prepare a written budget at the beginning of each financial year for the approval of the Museum Board?	<input type="checkbox"/>	<input type="checkbox"/>	
3. Does the museum's Treasurer present an annual financial report to the Governing Body?	<input type="checkbox"/>	<input type="checkbox"/>	
4. Are the museum's financial statements audited Or submitted to external financial review?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

5. Paid and Volunteer Staff Management




Date _____ Initials _____



	Y	N	N/A
1. Does the museum have a written personnel policy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is a copy of the personnel policy given to each new staff member, as recruited?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has the personnel policy been ratified by the Governing Body?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum have a formal mechanism for submitting, and responding to, staff grievances?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum have written job descriptions For each position within the museum, whether paid or voluntary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum have regularly scheduled staff meetings?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum, as employer, comply with provincial and federal employment legislation? 	<input type="checkbox"/>	<input type="checkbox"/>	
7. Does the museum delegate responsibility for finance to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum delegate responsibility for collections documentation to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum delegate responsibility for acquisitions and loans to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the museum delegate responsibility for security to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
11. Does the museum delegate responsibility for environmental monitoring and control to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Does the museum delegate responsibility for artifact handling and care to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Does the museum delegate responsibility for education and outreach to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Does the museum delegate responsibility for exhibit production/maintenance to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Does the museum delegate responsibility for publications to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Does the museum delegate responsibility for public relations and publicity to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Does the museum delegate responsibility for sales activity to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Does the museum make some provision for professional development of staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Does the museum provide a separate staff room?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

6. The Museum Building and Physical Safety



	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum delegate responsibility for the routine maintenance and repair of the museum building and premises to a specific individual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. If the museum is a seasonal institution, does it have a written procedure for winterizing the building and its contents?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. If the museum is a seasonal institution, does it have a written procedure for reopening in the spring?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. If the museum relies on an outside agency for maintenance and repair of the building and grounds, is there an established procedure for calling on that service, and is there a routine maintenance schedule agreed upon?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. If the museum building is officially designated as a heritage structure, do its standards of maintenance and restoration comply with those established by the designating authority?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. If the museum building is not designated, but is of historic importance, is restoration and maintenance done in a manner compatible with its historical integrity? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum comply with The National Building Code? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum building comply with federal and provincial public health and safety standards? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum have public liability insurance (or equivalent provision) against the event of an accident on museum property?	<input type="checkbox"/>	<input type="checkbox"/>	


	Y	N	N/A
10. Does the museum delegate routine maintenance of the museum grounds to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Does the Museum Board arrange for snow removal to allow access for routine inspections during the closed season?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Does the museum have regular building inspections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Does the museum building comply with fire code? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Does the museum have dry chemical ABC type fire extinguishers on site?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. If the museum has specialized collections (archives, photos, etc.) has it sought conservation advice about appropriate fire safety / suppression equipment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Are potentially flammable materials (e.g. cellulose nitrate films, biological material preserved in spirits) kept isolated from the rest of the collection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Does the museum have clearly marked emergency exits?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Do the museum's emergency exits open outward?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Are emergency exit routes clearly posted in the museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Does the museum have a written Emergency Preparedness/ Disaster Plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Does the museum have a First Aid Kit on site?	<input type="checkbox"/>	<input type="checkbox"/>	
22. Does the museum have at least one worker on each shift who is qualified with a valid Emergency First Aid Certificate? 	<input type="checkbox"/>	<input type="checkbox"/>	

	Y	N	N/A
23. Does the museum have an up-to-date list of all hazardous chemicals on site, in case of emergency treatment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Is an up-to-date list of emergency telephone numbers Posted in the museum? (See page 32)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:


7. Public Access and Public Services

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum have, within the community, clear prominent signs which give directions to the museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum have, outside the community, clear prominent signs which give directions to the museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Do the museum signs comply with the municipal and provincial signage laws? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Are bilingual texts or international symbols used in public service signage for your museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum make a conscious effort to accommodate the needs of the people with various physical challenges 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Are corridors, stairs and public areas of the museum well lit?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum have adequate rest-room facilities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum delegate responsibility for the maintenance of museum-owned roads and side-walks to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Are interpretive trails and paths safe?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Are trails and paths clearly signposted?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Does the museum maintain clear access to all doors of the museum building?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
12. Does the museum post its opening hours?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. If the museum is open only by request, are these arrangements clearly posted?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. If the museum operates a food service, does it comply with public health and safety regulations? 	<input type="checkbox"/>	<input type="checkbox"/>	
15. If the museum operates a food service, is it kept in an area separate from the museum's collections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

8. Insurance

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum carry public liability insurance?	<input type="checkbox"/>	<input type="checkbox"/>	
2. Does the museum carry insurance against fire, theft, or water damage against the building, its equipment and its furnishings?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum provide paid staff with insurance coverage against injury on the job, through the Workers' Health and Safety Compensation Commission? 	<input type="checkbox"/>	<input type="checkbox"/>	
4. Does the museum carry insurance to provide volunteer staff with coverage against injury on the job or injury while travelling on museum business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum have adequate rest-room facilities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum have a policy regarding loss or damage to artifacts on temporary loan to the museum?	<input type="checkbox"/>	<input type="checkbox"/>	
7. Does the museum insure artifacts on temporary loan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. If not, does the museum clearly state to the lender that the museum will not insure these artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Has the museum considered purchasing insurance against thief or damage to artifacts within their collection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

9. Museum Shop / Sales Activities

Date: _____ Initials: _____

	Y	N	N/A
1. Does the museum have a written policy governing sales activities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Do the museum's sales activities jeopardize the museum's credibility or public image?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the material sold in the museum shop relate to the museum's theme, collections, or exhibits?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Do the staff involved in the museum sales have specific training?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum delegate responsibility for museum sales to one specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Are the museum's sales activities based on sound business practice?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are the museum's sales activities properly regulated with budgets, accounting procedures and, if appropriate, audits all in place?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Are all replicas or reproductions sold clearly and permanently marked as such?	<input type="checkbox"/>	<input type="checkbox"/>	




Comments and Recommendations:

Checklist Summary: Museum Management

Priority	Date:	Initials:

10. Collections Management Policy

Date _____ Initials _____


	Y	N	N/A
1. Is the Museum Board familiar with Federal and provincial legislation relating to the acquisition and sale of artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Specifically, is the Museum Board of Directors familiar with:			
• The historic Resources Act (Government of Newfoundland Labrador)? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• The Provincial Archives Act (Government of Newfoundland and Labrador)? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• The Federal Cultural Properties Export and Import Act? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the Museum Board familiar with Federal legislation relating to exhibition and reproduction of art objects made by living artists?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Specifically, is the Museum Board familiar with the Copyright Act?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum have a written Collections Management Policy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Has the Museum submitted its Collections Management Policy to the Governing Body for approval?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the Museum Board periodically review its Collections Management Policy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


	Y	N	N/A
5. Does the Museum Board of Directors have a written Collections Management Manual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum undertake periodic inventory checks of its collection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

11. Documentation

Date _____ Initials _____

	Y	N	N/A
1. Does the museum assign a unique accession number to every artifact received by the museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum locate the accession number on the artifact type in a consistent fashion?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. When an artifact is on temporary loan to the museum, does the museum assign it a unique loan number?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When an artifact is on temporary loan to the museum, does the museum attach the loan number to the artifact with a tag?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum apply accession numbers to the artifacts in accordance with professional conservation standards? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Is the accession register written in ink, typed, or entered into a computer?	<input type="checkbox"/>	<input type="checkbox"/>	
Is a loan register completed?	<input type="checkbox"/>	<input type="checkbox"/>	
6. Does the museum store a second copy of the accession and loan registers in a location other than the museum or does it store them in a certified fire retardant safe?	<input type="checkbox"/>	<input type="checkbox"/>	
7. Does the museum keep a master file for each artifact Which includes the following information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Name, address, telephone number of donor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

• Whether the artifact is donated or purchased	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• A signed donor form, bill of sale, proof of legal title.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• All information about the artifact gained from the donor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• All information about the artifact gained by observation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• All information about the artifact gained by research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• the location of the artifact, either in the museum or in storage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum keep a current list of all those artifacts on loan to other institutions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. For artifacts removed from the museum's collection does the museum keep a complete deaccession register?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the museum delegate the responsibility for documentation of the museum's collections to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Does the museum use terminology of a professional standard in its documentation of artifacts? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Does the museum use appropriate documentation forms for its archaeological, natural history, or mineralogy collections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Does the museum document each artifact in its collection with a photograph?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. If the museum has works of art in its collection, Does it keep resumes of the artists on file?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

12. Accessions, Deaccessions and Loans

Date _____ Initials _____

	Y	N	N/A
1. Does the Collections Management Manual include written procedures for accessioning, deaccessioning, and processing of loans?	<input type="checkbox"/>	<input type="checkbox"/>	
2. Does the museum ensure that a signed donor form, proof of legal title, or bill of sale is secured for each artifact accepted into the museum's permanent collection?	<input type="checkbox"/>	<input type="checkbox"/>	
3. Does the museum accept donations of artifacts that have conditions attached?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum's donation form clearly describe conditions under which deaccessioning could occur and the procedures that would be followed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. When an artifact is deaccessioned, does the museum notify the donor of this decision?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the Museum Board periodically review the museum's collection to ensure that it follows the limits of subject, geography and time established in the Collections Management Policy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

13. Cataloguing

Date _____ Initials _____

	Y	N	N/A
1. Does the museum have a Collections Management Manual which details cataloguing procedures to be followed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Are all artifacts in the museum's collections catalogued?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Are the museum catalogue records written in ink, typed or entered into a computer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum delegate the responsibility for responding to public requests for information about the collections to a specific individual who is trained in information retrieval?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. If the catalogue records contain confidential information, does the museum control access to them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum keep catalogue files current as more information becomes available?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum train its staff to record information about the collections which is provided by researchers or by museum visitors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Are the museum's catalogue records cross-referenced with other records such as donor files, artist resume files and photo documentation files?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. If the museum has archaeological, natural history or mineralogy collections, are these catalogued using appropriate forms?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Is a paper copy of all catalogue records or a back up electronic copy stored in another location within the community as a safeguard against fire?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


Comments and Recommendations:

Checklist Summary: Collections Management

Priority	Date:	Initials:

14. Research/Resource Centre

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum promote research about its themes and its collections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum delegate responsibility for encouraging research activities to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. If the museum is housed in a historic building, has the history of the building been researched?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum possess a library of reference material for use in research projects?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum have specific space set aside for research activities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum attempt to research artifacts as they are being catalogued?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum attempt to research artifacts as they are being catalogued?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum supervise researchers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum instruct researchers to respect the condition, security, and handling of artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the museum restrict visiting researchers from access to confidential information about the ownership or value of its collections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Does the museum request that researchers acknowledge the museum as a source in their use of the research?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Does the museum abide by copyright and reproduction guidelines in its research? 

☐☐☐

13. Does the museum request that each oral history informant sign a release form granting permission to publicity use the information obtained in the interview?


☐☐☐

Comments and Recommendations:

Checklist Summary: Research

Priority	Date:	Initials:

15. Artifact Storage

	Date _____	Initials _____	
	Y	N	N/A
1. Has the Museum Board delegated responsibility for the storage area to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has the storage area been designated with the help of advice from a trained Conservator? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum have an artifact storage area separate from other museum functions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is the storage of maintenance, cleaning and construction supplies kept separate from the artifact storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Is the storage area protected from potential fire and water hazards?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Is daylight eliminated from the storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are any unnecessary doors to the storage area eliminated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. If the artifact storage area is in a basement or attic, have arrangements been made for regular inspection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Has proper drainage been assured in any basement storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Has the roof been insulated to protect any attic storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Is the artifact storage area sufficiently large to avoid overcrowding of the artifacts and to allow the use of appropriate storage shelves and cabinets?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
12. Are the doors to the storage area large enough to allow easy access when staff are moving larger-sized artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Has the floor loading of the storage area been tested to ensure its safety given the weight of furnishing and artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Does the storage area comply with fire regulations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Are food, and drink banned from the storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Does the storage area have pick-resistant, high impact resistant locks on all doors and windows?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Is access to the storage area strictly controlled?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Is a security book maintained to record all entries into the storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Is the storage area used for traffic to another part of the museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:


16. Storage Furnishing and Procedure

	Date _____	Initials _____	
	Y	N	N/A
1. Has the museum drawn a plan of the storage area and posted it?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Are the lowest shelves in the storage area at least 4 inches (10 cm) off the ground?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Are all artifacts not on shelves or in cabinets raised off the ground on pallets or blocks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is there space for air circulation between the shelves or cabinets and the exterior walls?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Are the aisles in the storage area wide enough to allow easy movement when moving artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Are the artifacts stored within comfortable reach of staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum have a work space available for handling and documenting artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum arrange the artifacts in storage first by types of material, then by size?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum label the artifact boxes and containers, listing artifacts type and accession numbers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the museum isolate potentially flammable artifacts (cellulose nitrate films, biological material preserved in sprits) from the rest of the collection?	<input type="checkbox"/>	<input type="checkbox"/>	
11. Are all cabinets and shelves clearly numbered to allow accurate recording of location in the artifact master files?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
12. Does the museum have a system for keeping track of the artifacts removed from storage for legitimate reasons?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Does the museum store the artifacts with supports to prevent accidental movement or shifting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Does the museum use acid-free packing/padding materials?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Are artifacts stored in their natural, or most stable positions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Does the museum pad out soft objects?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Does the museum drape open shelving with polyethylene or cloth as protection from dust?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Does the museum ensure that artifacts are not stored on the top of cabinets or on top shelves?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Does the museum ensure that there is adequate air circulation in the storage area to avoid mould problems?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Does the museum protect sensitive materials from direct contact with wooden storage units?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Does the museum store paper documents in acid-free boxes, envelopes or folders?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Does the museum store especially valuable artifacts in a safe or safety deposit box, and ensure that appropriate environmental conditions are maintained?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Does the museum have a separate storage area for the education collection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

17. Storage Environment

	Date _____	Initials _____	
	Y	N	N/A
1. Has the museum consulted a trained Conservator for advice about the storage requirements of its collection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum have a thermometer in the storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the museum have a hygrometer strips in the storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum regularly check its monitoring equipment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Has the museum draft-proofed the storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Is the storage area insulated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. If the museum is unable to control environmental conditions in the storage area, have arrangements been made to store particularly sensitive artifacts in sealed microclimates?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum do regular housekeeping of the storage area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum make arrangements to ensure that any new acquisitions are isolated and checked for infestations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum regularly check its collections for infestations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. If the museum has fluorescent lights, does it regularly check ultraviolet radiation levels and install filters as required? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
11. Are lights kept off when the storage area is not being used by researchers or museum staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. When researchers or museum staff are in the storage area are light levels kept below 150 lux?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Are particularly sensitive artifacts kept in darkness whenever possible?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Does the museum protect electromagnetic discs/tapes from proximity to steel or other potential sources of magnetic interference?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

18. Security

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum have a written security policy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the museum give staff training in security procedures?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum delegate responsibility for security to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum have pick-resistant, impact-resistant locks on all windows and doors of the museum building?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum restrict visitor access to office and artifact storage areas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Are keys to artifact storage areas restricted to a few designated people?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Are easily portable and particularly valuable artifacts kept in a safe or safety deposit box?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Is access restricted to confidential information about the value and ownership of the museum's collection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Have written emergency procedures been prepared and circulated to all staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum request visitors not to carry large bags, umbrellas, etc. into exhibit areas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the museum request visitors not to touch artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
11. Are sufficient staff on duty during opening hours to monitor visitors in each area of the museum's exhibits?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Do the museum staff routinely check exhibits for missing or damaged artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Are the museum's exhibit cases locked or secured in another fashion?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. If artifacts are not in cases, are they placed at a distance from the visitor and protected with a barrier?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Does the museum prohibit food and drink in the exhibit area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Does the museum have a WRITTEN daily opening and closing routine that has been circulated to all staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Do the museum staff regularly check the exterior of the building and the grounds for security risks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Are the museum building and grounds regularly checked for security risks during the closed season?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Are researchers supervised?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Is there an up-to-date list of emergency telephone numbers posted in the museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

19. Environmental Control and Monitoring of Exhibit Areas

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum delegate responsibility for environmental control and monitoring to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum regularly record temperature and humidity levels?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum have draft-proofing in place?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is the museum building insulated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum have microclimate areas for particularly sensitive artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum regularly check and recalibrate its environmental monitoring equipment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are lights kept off when space is not being used by the staff or the public?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Are the lux levels of light fixtures monitored and steps taken to reduce them, as required?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Is the ultraviolet radiation level of daylight monitored and steps taken to reduce it, as required?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
10. Does the museum keep light levels appropriate for the artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Does the museum have dust-collecting mats or grills by outside access doors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

20. Pest control

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum train staff to recognized signs of infestation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum isolate newly acquired artifacts in order to check for infestation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum record a history of pest infestation on the artifact's condition report?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum regularly check for pest infestation through its collections and throughout the museum building?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum train staff in safe methods of using pest control substances?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Has the museum installed screens in doors and windows for the summertime?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

21. Artifact Handling and Care

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum have a written Collections Care policy as part of its Collections Management Policy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum delegate special responsibility for care of artifacts to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum train all its staff in the proper care and handling of artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum have a manual outlining acceptable procedures for handling artifacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Do the museum staff follow the general rule of handling artifacts as little as possible?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Do collections management staff apply accession numbers using conservation approved methods?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum ensure that its staff moves artifacts on trays or trolleys, with packing/support?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum ensure that its staff handle sensitive materials with clean cotton gloves?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum provide its staff with protective clothing when working with biological collections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the museum train its staff to handle artifacts with proper support techniques?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
11. Does the museum seek profession advice when artifacts need to be packed and transported some distance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. When artifacts are transported outside the museum are conservation procedures observed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Do the museum staff separate artifacts from any construction or exhibit preparation activity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Does the museum have a special education collection of artifacts which has been designated for more active use than the artifacts in the permanent collection?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. If the public is allowed to use an artifact, or if staff demonstrate their use, are safety concerns addressed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Does the museum guard against using any artifact which may suffer wear through use?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

22. Treatments

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum seek professional advice, or contact conservation services, for thorough cleaning of an artifact?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum seek professional advice, or contract conservation services, for repair of an artifact?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum seek written permission from the owner if repairing or treating an artifact on loan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum keep a record of all repairs done to an artifact?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum use only conservation-approved cleaning and treatment methods and products?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Are any adhesives or other substances applied to artifacts conservation approved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Do collections management staff apply accession numbers using conservation approved methods?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum keep any part which becomes detached from an artifact?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the museum identify any detached part of an artifact which the same accession number as the artifact itself but with the addition of a letter to indicate that the part is from a larger whole?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Is information about the detached part entered on the artifact's master file?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

Checklist Summary: Care of Collections

Priority	Date:	Initials:

23. Exhibitions

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum delegate the overall responsibility for exhibit development and coordination of the exhibit team to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Are the museum's exhibits relevant to its Statement of Purpose?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum research its exhibits?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum promote its exhibits to the public?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum produce an exhibit plan for each exhibit to be developed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Is the museum sensitive to the needs of disabled visitors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are all artifacts accurately identified through an exhibit label or exhibit catalogue?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Are bilingual or multilingual exhibit labels or catalogues prepared?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. If reproductions are used in the exhibit, does the museum identify them as such?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the museum regularly check the artifacts in an exhibit as protection against theft or damage?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Does the museum record the location of each artifact in an exhibit in the artifact's master file?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Y	N	N/A
12. Does the museum have a procedure for advising all staff of the routine removal of artifacts from the display?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Does the museum follow conservation recommendations regarding light levels for exhibit areas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Has the museum taken steps to control ultraviolet radiation from light fixtures and windows?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Does the museum record temperature and humidity levels in exhibit and artifact storage areas on a regular	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Does the museum keep temperature and humidity at acceptable levels in exhibit and artifact storage areas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If environmental levels cannot be controlled in the exhibit and storage rooms, are sensitive artifacts protected by sealed cases?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. If exhibit cases are lit by fixtures inside the case, are they designated to prevent heat build up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Does the museum regularly do housekeeping in the exhibit areas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Are artifacts on exhibit mounted in a conservation-approved manner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Are artifacts placed on display with sufficient space to allow easy access by museum staff and ease of viewing by visitors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Are exhibit cases constructed so that they are secure from theft, but still allow reasonable access to staff?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Is the exhibit area designed to allow easy traffic flow for both individual visitors and larger groups?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- | | | | |
|--|--------------------------|--------------------------|--------------------------|
| 23. Is the height, size, and placement of exhibit texts such that it is comfortable for both adults and children? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 24. Does the museum prohibit food and drink in the exhibit area? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 25. Does the museum request the visitors not to touch the artifacts? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 26. Does the museum have sufficient staff to provide security for the exhibits during all opening hours? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 27. Does the museum have a policy to deal with requests from visitors to photograph the exhibits? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 28. Are all staff who work with or around the artifacts trained in artifact handling procedures and general care considerations? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 29. Does the museum undertake regularly checks of exhibits and other public areas for cleanliness and repair? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 30. Does the museum delegate the responsibility for routine maintenance of the exhibit to a specific individual? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 31. Does the museum delegate the responsibility for routine housekeeping of the exhibit to a specific individual? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 32. Has a regular schedule been established to review the exhibits for damage and to undertake routine maintenance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 33. Are the artifacts kept separate from work areas during the renovation or construction of exhibits? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 34. Are exhibits involving artifacts in active use operated with attention to safety consideration? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 35. If your museum regularly receives travelling exhibits, Is there sufficient preparation and storage space available? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Comments and Recommendations:

Checklist Summary: Exhibitions

Priority	Date:	Initials:

24. Interpretation and Public Programs

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum undertake public programs to enhance the visitor' experience of the museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum have a written policy for Interpretation and public programming?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum delegate responsibility for Interpretation and public programming to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum provide training for all staff involved with the public on a day-to-day basis, and for special events?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the Museum Board ensure that sufficient training is provided to ensure that staff present only valid information to the museum visitor?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum offer a variety of public programming during the year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum offer a variety of public programs suited to a variety of audiences?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum provide both general tours of the museum and talks related to the museum's special interests or special interests of the visitors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. When it is difficult to offer programs within the museum itself, has the Museum Board considered holding special events in other community locations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Date _____ Initials _____

Y

N

N/A

10. Does the museum allocate resources in the annual budget for interpretation and public programming?

☐☐☐

11. Does the museum have policies and procedures in place for evaluating their interpretation and public program activities?

☐☐☐

Comments and Recommendations:

25. Public Relations

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum attempt to have continuing contact with the general public?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the museum attempt to have continuing contact its membership?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum delegate responsibility for public relations to a specific individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the museum produce promotional material?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum have a website?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum contact the local media from time to time to keep them informed of activities at the museum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum keep an archives of all its promotional material, press releases, posters, press clippings, etc.?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum periodically evaluated the effectiveness of its publicity and public relations efforts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

26. Public Relations; Inquiry Services

	Date _____	Initials _____	
	Y	N	N/A
1. Does the museum have a written Inquiry Policy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Are all inquiries for information directed to the person most qualified to deal with them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the museum refer all (financial) appraisals of artifacts to antique dealers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is access restricted to confidential information about the value and ownership of the museum's collections?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the museum make arrangements to deal with inquiries about opening hours and museum exhibits and activities, during the open seasons?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the museum make arrangements to deal with inquiries about opening hours, museum exhibits and activities during winter months?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the museum provide its staff with training in dealing courteously and professionally with the museum's visitors and inquiries?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does the museum keep a record of all requests for information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and Recommendations:

Checklist Summary: Public Programs

Priority	Date:	Initials: