

Report CCR-PCD-05-15

To: Chair Wright and Members of the Planning and Community Development Committee

From: Petal Furness, Interim Manager and Sim Salata, Collections Manager

Meeting Date: March 17, 2015

Subject: **To review and approve an amended Collections Management Policy and its Acquisition and Deaccession procedure**

Status: Recommendation adopted by Committee as presented per Resolution PCD45-15; Endorsed by County Council April 7, 2015 per Resolution CC55-15;

Recommendation(s)

WHEREAS Grey Roots Museum and Archives is offered donations of high-value and/or large objects/collections of objects;

AND WHEREAS on such occasions, staff would benefit from having an Ad Hoc Acquisition Committee to consider such donations and direct them to the permanent artefact collection, accept them as un-accessioned gifts of property, or decline the proposed donations;

AND WHEREAS staff do not have expert knowledge on all artefacts and need to access this expertise from community members who are content specialists;

NOW THEREFORE BE IT RESOLVED THAT MS-GR-002 being the Collections Management Policy and MS-GR-002-001 being the Acquisition and Deaccessions Procedure, be revised to include the following as recommended in Report CCR-PCD-05-15:

- **A Permanent Collection Acquisition Matrix be used as a tool when assessing such objects.**
- **Use of an Ad Hoc Acquisition Committee comprised of the Museum Manager, Collection Manager, the Registrar, and an appropriate content specialist (to be determined by the proposed artefact donation).**

Background

Since moving the Grey County-Owen Sound Museum to Grey Roots in 2004, the public profile of the County's museum has grown and, as a result, the number of potential artefacts has also increased. Grey Roots has been offered several large collections and high-value objects to its permanent artefact collection. Some of these have been accepted. In 2016 staff will be working with experts to prepare a Grey Roots Collections Plan. In preparation for this task, staff are finishing the background work (artefact inventory 2013) and the artefact cultural-historical rating project (to be completed this year). In the interim, the storage areas continue to accumulate new accessions.

It is recommended that the County's procedure for acquisitions and deaccessions be updated to include a matrix to guide accepting articles into the collection and an Ad Hoc Acquisitions Committee be established to make decisions on donations under certain circumstances.

An Ad Hoc Acquisitions Committee would incorporate the viewpoints of a variety of knowledgeable stakeholders in the decision-making process. Especially useful would be the expertise provided by a community member content specialist. For example, proposed donations of antique vehicles or agricultural equipment, or perhaps works of art, are objects that staff would seek outside expertise.

Currently, the decision of whether to accept or decline a proposed donation to the permanent or educational collection rests with the Collections Manager for artefacts. The vast majority of potential donations are easy decisions, governed by the *Essential Criteria for Acquisition* as outlined in the Acquisitions and Deaccession Procedure. When considering large, sensitive/controversial, or high-value collections and/or items, the proposed matrix will be a helpful tool for the Ad Hoc Acquisitions Committee.

An Acquisitions Committee benefits the museum as it reduces short-sighted or one-sided decisions, and reduces bias and collecting preferences of one person. More importantly it clearly demonstrates to potential donors the reasons why the object(s) were accepted or not accepted into the permanent artefact collection and furthermore, communicates that decisions were made by committee.

Amendments to the Authority section of the Collection Management Policy (MS-GR-002) and to the Responsibility section of the Acquisition and Deaccessions Procedure (MS-GR-002-001) are attached.

Financial / Staffing / Legal / Information Technology

Considerations

There are no staffing / legal / information technology considerations.

There is a finite amount of artefact storage space and financial considerations are long-term. Staff time is needed to maintain artefact's physical well-being and conservation, environmental controls, often specialized containers for light, dirt and pest control and sometimes specialized consultation and treatment. Each item proposed for accession needs to be carefully considered to ensure that its historical/cultural worth and future exhibition, education and or research value warrants these costs.

Link to Strategic Goals / Priorities

Relevant policies and procedures that guide staff support Goal 6 of achieving excellence in governance and service.

Attachments

Acquisition and Deaccession Procedure, MS-GR-002-001

Respectfully submitted by,

Petal Furness

Interim Manager

Sim Salata

Collections Manager

Director Sign Off: *Sharon Vokes*



Collections Management Policy

Approved by: County Council
Last Revision Date: March 4, 2015
Scheduled for Review by: 2020

Date Approved:
Replaces: n/a

Policy Number: MS-GR-002
Sub Section: Grey Roots

Section: Municipal Services

References and Related Documents

[MS-GR-002-001 Grey Roots Acquisitions and Deaccessions Procedure](#)
[MS-GR-004-002 Grey Roots Access, Research and Reading Room Procedure](#)
[GR-05-07 Conservation Policy](#)
[GR-01-05 Integrated Pest Management Plan](#)
[GR-09-08 Off Site Steam Traction Engine June 2008](#)
[GR-01-07 Loans Policy](#)
[GR-01-09 Moreston Heritage Village Building Selection Policy](#)

Forms

[Moreston Heritage Village Building Policy App Matrix June 2 2010](#)
[Grey Roots Artefact Deed of Gift](#)
[Grey Roots Temporary Custody Receipt](#)
[Grey Roots Archives Deed of Gift Form](#)
[Grey Roots Archives Accession Form](#)
[Grey Roots Archives Photograph Release Form](#)
[Grey Roots Archives Oral History Materials Release Form](#)
[Grey Roots Archives Oral History Copyright Release Form](#)
[Grey Roots Archives Transfer Agreement Form Archives Copy](#)
[Grey Roots Archives Transfer Agreement Form Municipality Copy](#)
[Grey Roots Archives Deaccession Form](#)
[Grey Roots Archives Archival Material Loan Agreement](#)
[Grey Roots Archives Community Loan Form](#)

Policy Statement

Grey Roots Museum and Archives, owned and operated by the Corporation of the County of Grey, is committed to responsible and ethical collections management practices which meet all municipal, provincial and federal legislative requirements.

Purpose

The Mission of Grey Roots Museum and Archives is to celebrate Grey County's past, present and future through its collections, heritage village, innovative and engaging exhibits, events and programs, bringing the history and ambitions of its people to all generations and visitors.

As such, Grey Roots Museum and Archives is dedicated to:

Honouring all the people of our shared history

Respecting the heritage and traditions of our people

Celebrating the unique character of Grey County

Advocating for the accurate representation of our history and the multiple voices in our community

Cooperating with our people, community and business organizations to achieve our shared vision

Grey Roots Museum and Archives' collections are a tangible representation of Grey County's heritage and in order to retain their informational and historical value, they must be properly cared for and documented.

The purpose of this collections management policy is to establish procedures and criteria for the acquisition, exhibition, preservation and management of Museum and Archival collections. The collections policy will identify the duties and responsibilities of the collections staff and ensure that these duties meet a high professional standard, the Museum staff in general and the Museum's governing body.

Scope

This procedure provides a framework for collections management and should be read in conjunction with its references and related documents.

This procedure applies to all Museum and Archives staff and volunteers.

For definitions, please see the last page of this document.

Stewardship of the Collections

Grey Roots is committed to maintaining, making available and presenting a relevant and healthy archival and object collection representative of the heritage of Grey County. It is through the acquisition of genuine artefacts and historic documents that Grey Roots Museum & Archives is able to fulfill its obligation to protect, interpret and provide access to materials of historic value, relevant to the County of Grey.

At the same time, it is the first function of the Archives to assist the Corporation of the County of Grey and its lower-tier municipalities in fulfilling public obligations for the preservation and access to records that must be retained by the order of provincial legislation or because of their enduring cultural value.

The Museum's stewardship of the collections entails the highest trust and the presumption of permanence, care, documentation and accessibility. However, as situations and policies change, it is sometimes necessary to move an item from one accessioned collection to another, to alter the status of an object with the collections, to deaccession an object from the collections, or to exchange items between institutions.

Grey Roots also recognizes that living history methods are an integral part of collections management consideration. It is the Museum's responsibility to balance preservation and conservation needs with the educational and interpretive use of the collections. This policy's function is to outline procedures and set criteria by which the Collections Manager and Archivist can determine how best to meet these needs.

Authority

The Grey Roots Museum and Archives is owned and operated by the County of Grey and reports to the Planning and Community Development (PCD) Committee in order to fulfill the legislative requirements of the Museum Board as set out in the Ontario Heritage Act R.R.O. 1990, Regulation 877 – Grants for Museums.

The PCD Committee, led by the Chair, is responsible for approving Grey Roots goals and policies, and for approving the annual budget. Additionally, the PCD Committee assists in the collections management of Grey Roots by approving the acquisition of high-value objects and acting as a deaccessions committee.

An Ad Hoc Acquisition Committee considers proposed artefact donations of sensitive nature, high-value and/or large objects/collections of objects, to determine if they should be accessioned into the permanent artefact collection, should be acquired for the educational collection or unencumbered gifts of property, or should be declined. The committee is comprised of the Museum Manager, the Collections Manager, the

Registrar, and an appropriate content specialist who is determined by the proposed donation.

Management

The Manager, Museum and Archives works directly with the County Clerk / Director of Council Services in managing the operations of Grey Roots. The County Clerk/Director of Council Services reports to Grey County Council.

Overall responsibility for the management of the museum and archives collections lies with the Manager, Museum and Archives who is guided by the policies and procedures outlined in this document. The Manager shall delegate specific responsibilities to appropriate members of the staff in managing the collections.

Staff

As with the Manager, Museum and Archives, the staff too shall be guided in their collections-related work by these policies and procedures. The prime directive for the Manager, Museum and Archives and staff is the protection and preservation of the collections. The immediate responsibility for the physical care and management of object collection records lies with the Collections Manager. The immediate responsibility for the physical care and management of archival material collection records lies with the Archivist. Both are vested with decision making-authority and responsibilities by the Manager, Museum and Archives and both balance the need for conservation and maintenance of each collection piece with the need for public access, research and special exhibition needs, education and interpretive needs, staff research, and funding.

The Registrar and Assistant Archivist report to the Collections Manager and Archivist, respectively, and have decision-making authority and responsibilities vested in them by their supervisors. They are responsible for insuring the physical well-being of the collections through proper risk management, maintaining detailed collection records, providing appropriate public access to the collections and responding to collection research requests.

Scope, Categories and Uses of the Collection

The artefact collection at Grey Roots is composed of a diverse group of objects - from textiles to agricultural machinery - and reflects the history of Grey County from pre-contact to present day. In conjunction with museum staff, interpretive themes have been identified to direct collecting focus toward artefacts that support the following in

Grey County: First Nation History, pre- and post-European contact, pioneers and early settlers (1830s to 1855), farm life and agriculture, industrial development, commercial development, military history, transportation and noteworthy names.

The museum has been collecting since 1955, and currently has a substantial holding of artefacts, nearly solely donated by Grey County residents or descendants of residents.

The Grey County Archives was established in 2000, drawing from an Archives run by the Grey County Historical Society approximately two years prior. Archival materials donated to the Grey County Museum before the Archives existed have been incorporated into the archival holdings. Periodic transfers of municipal records have been made by both upper and lower tier municipalities since 2000. Material collected for accession into the Archives must have a clear and strong connection to Grey County.

Grey Roots Museum and Archives currently has four types of collections:

The **permanent artefact collection** is the museum's primary collection, allowing it to fulfill its mandate and maintained at the highest standards and requiring the most complete documentation. Accessions to the permanent collection are intended to be in the museum's care, held in public trust, for the foreseeable future. Only those objects deemed suitable for acquisition into the Museum's permanent collection are accessioned and curated (this does not necessarily mean that other collections are considered impermanent or disposable). Public physical access to the permanent artefact collection is restricted. For further details on public access to this collection, please see MS-GR-004-002 Access Research and Reading Room Procedure.

The **education collection** is made of objects intended to be used in hands-on activities and demonstrations, with the knowledge that they will, eventually, be used up, so they are held to a lower level of care. Because they will suffer from wear and tear during educational programming, objects within this collection are non-accessioned (thus not held in the public trust), and non-curated – i.e., collections staff does not record, track or protect education collection items to the same degree as permanent collection artefacts, although some items that have been deaccessioned from the permanent collection and transferred to the education collection do continue to be tracked in the collections management database in case of public/donor inquiry.

The **museum reference library collection** is made up of books, magazines, reports, brochures, catalogues, and advertising pieces that supplement the museum's ability to research its permanent collection and present Moreston Heritage Village and its historical research for exhibitions accurately and otherwise further its Mission. This is a collection that, like the education object collection, is held to be used by staff, volunteers, students and researchers, thus staff does not record, track or protect education collection items to the same degree as permanent collection artefacts, i.e.

materials within this collection are not non-accessioned (thus not held in the public trust), and non-curated, but records are kept of use of library materials. The reference library collection is tracked and maintained by the Collections Manager and access is restricted to in-house museum use and/or with a sign-out system at the discretion of the collections manager, depending on rarity and condition of the material. Items designated as reference library collection items are not subject to the collections management policies set forth in this document.

There are two distinct kinds of holdings in the Archival Collection: private and municipal.

The Archives acquires material through private sources where the intention is that Grey Roots Museum & Archives (and therefore the Corporation of the County of Grey) becomes the owner. At the same time, the Archives is also a repository for government records. Legislation states ownership for municipal records resides with the creating municipality.

Acquisitions

Acquisitions are made to either the artefact collection or the archival collection, which are managed independently of one another.

Acquisition to the permanent artefact collection or, as applicable, the archival collection, may be made by gift, purchase, transfer, bequest, exchange with other non-profit or other educational organizations, field collection, adoption of orphaned collections, conversion of unclaimed or old loans, governmental deposit and salvage.

Grey Roots is under no obligation to accession gifts that are bequeathed.

Objects may come into the education and library reference collection as gifts (designated as education collection on their Temporary Custody receipt), purchases, or transfers of deaccessioned items from the permanent collection. They may be used as exhibit props, educational outreach programs, and supplementary research material. Objects may be removed from this collection if they are damaged, lost, or are no longer relevant to the collection's purposes. Items designated as education collection items are not subject to the collections management policies set forth in this document.

For further details on how each type of acquisition identified, processed and managed, please see MS-GR-002-001 Grey Roots Acquisitions and Deaccessions Procedure.

Definitions

Accession: Something that has been formally accepted and entered into the museum or archives accessioned collection, to be held in the public trust and administered according to the collections management policy.

Accessioning: The process of transferring ownership of an acquisition to the museum or archives including the process of recording the acquisition as part of the collection. Acquisitions cannot be added to the collection, registered or catalogued until they have been accessioned.

Acquisition: Something obtained by the museum or archives. Acquisition does not mean that a transfer of ownership has taken place.

Archival Record: Photographs, paper documents, books, and audio-visual material in the collection of the Grey County Archives.

Artefact: A human-made item often manufactured or created from naturally-occurring materials and made for use in a cultural context.

Collections: Archival records, artefacts, specimens and historical structures that have been formally accepted into the stewardship of the Grey Roots Museum and Archives, with the strong presumption of perpetual care, management and access for present and future generations.

Deaccession: The formal and permanent removal of an artefact or specimen from the accessioned collection, following stringent guidelines and detailed procedures which follow the ethical guidelines of the International Council of Museums (ICOM), the Canadian Museum Association (CMA) and federal and provincial legislation.

Disposal: The formal and permanent transfer of legal title from an institution to another institution, group or individual, either by way of gift, exchange or sale. In certain rare cases disposal may be by purposeful destruction of the artefact or archival record.



Acquisition and Deaccession Procedure

Approved by: County Council

Date Approved:

Last Modified Date: March 4, 2015

Replaces: GR-02-07

Scheduled for Review by: 2020

Procedure Number: MS-GR-002-001 **Parent Policy:** MS-GR-002

Author: Grey Roots Museum and Archives

References and Related Documents

[MS-GR-002 Grey Roots Collections Management Policy](#)

[ADM-02-09 Valuation of Donations Policy](#)

[By-law 4696-10 to replace Records Retention Schedule of By-law 4481-08](#)

[Schedule to ADM-06-08 Amended Records Retention Revised 2010](#)

[A-FIN-001-001 Purchasing Procedures](#)

[GR-01-07 Loans Policy](#)

Forms

[Moreston Heritage Village Building Policy App Matrix June 2 2010](#)

[Grey Roots Artefact Deed of Gift](#)

[Grey Roots Temporary Custody Receipt](#)

[Grey Roots Archives Deed of Gift Form](#)

[Grey Roots Archives Accession Form](#)

[Grey Roots Archives Photograph Release Form](#)

[Grey Roots Archives Oral History Materials Release Form](#)

[Grey Roots Archives Oral History Copyright Release Form](#)

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[Grey Roots Archives Deaccession Form](#)

[Grey Roots Archives Archival Material Loan Agreement](#)

[Grey Roots Archives Community Loan Form](#)

Purpose

Adding items to the museum or archival collection is a core museum and archives function. Accessioning has legal and ethical obligations with regard to storage, management, documentation and maintenance of the collections for the public and thus, should not be taken lightly. Generally, only objects that have been evaluated and approved to be kept for the foreseeable future should be accessioned.

On the other hand, in order for collections to thrive, they need to be treated as organic entities. Sometimes, museums and archives need to deaccession and dispose of artefacts from their collections to allow for better examples to enter the collection, and to remove objects that fall outside the core collecting mandate, allowing museums to re-direct their resources towards the remaining items. Carefully used, deaccessioning and disposal can make artefact and archival collections, and therefore our heritage facilities, stronger.

This procedure outlines how artefact and archival acquisitions and deaccessions are to be executed.

Scope

This procedure applies to both the Museum and Archives collections at Grey Roots.

Ownership

All donors surrender all ownership rights upon signing the Deed of Gift form. All artefacts and archival documents held by Grey Roots are regarded as assets of the County of Grey.

Essential Criteria for Acquisition

Grey Roots will consider the following in determining whether to accept or reject any artefacts or archival material for its permanent collection:

1. The item(s) are largely primary or unique in nature and are identified. Emphasis is on original material. Lack of information about the provenance or context of items may prevent their acquisition.
2. There is proven relevance to the Mission of Grey Roots Museum and Archives. There must be a direct Grey County connection for the items to be sought. Material of significance to other archives, museums and cultural institutions should be directed to those institutions.

3. Physical condition and/or storage limitations will be considered. Acquisitions in poor condition may be rejected due to the time and expense involved in their conservation compared to the value of the evidence they contain or because their presence at Grey Roots may jeopardize other artefacts or documents in the collection (ex. cellulose nitrate, lead). Grey Roots may not be able to accommodate large collections without compromising other objectives.
4. Redundancy to the Collection will be considered. If the potential acquisition duplicates items already in the collection, it will not be sought.
5. Potential for present or future use will be considered. Acquisitions must have research or exhibition value that extends beyond personal value to the donor.
6. Conditions of acquisition imposed by the donor and access restrictions will be considered. Lengthy access and exhibition restrictions imposed by the donor detract from the goal of providing research material and/or exhibitions for the public and may influence the decision to make the acquisition.
7. Proof of ownership or rightful possession and completion of the Deed of Gift are necessary. Grey Roots cannot accept donations if title is not clear. Any proven misrepresentation of ownership will render a signed Deed of Gift form null and void and the donation will be returned to its rightful owners if they do not wish to transfer title to Grey Roots.
8. Materials not accepted by Grey Roots shall be returned to the prospective donor. Materials are the responsibility of the donor until such time as the Grey Roots formally accepts them. Such evaluations will be made prior to, but if necessary after, acquisition formalities are completed.

Responsibility

The Collections Manager is responsible for all accessions to the Museum's permanent artefact collection and the Reference Collection, and the Heritage Interpretation Supervisor is responsible for all acquisitions to the Education collection. The Archivist is responsible for all accessions to the Archives.

Where a potential donation is of a sensitive nature, of high-value and/or comprised of large objects or a large collection of objects, or when collections staff does not have expert knowledge of the proposed donation, an Ad Hoc Acquisition Committee comprised of the Collections Manager, the Registrar, the Museum Manager, and an appropriate content specialist to be determined by the proposed donation. The committee's responsibility is to determine whether the proposed donation should be accessioned into the permanent artefact collection, acquired for the education collection, accepted as unencumbered gifts of property, or declined.

In all such cases, staff will prepare a report on the proposed donation in advance, and the Grey Roots Permanent Collection Acquisition Matrix attached as Schedule A will be utilized to help facilitate the committee's decision. The proposed donor will be notified in writing of the committee's decision within one week of the committee meeting.

Acquisition

In accordance with Grey County's [ADM-02-09 Valuation of Donations Policy](#), all donations with a valuation in excess of \$20,000 shall have Council approval.

It should be made clear to all prospective donors that upon signing the Deed of Gift for an object that is to be accessioned, they surrender all ownership rights to the property identified therein.

Donors, upon request at the time of donation, may be issued a receipt for tax purposes. Grey Roots will be the final arbiter of the method by which the donated item(s) are appraised and the appraisal conclusion for income tax purposes. Such evaluations will be made prior to, but if necessary after, acquisition formalities are completed.

One copy of the Deed of Gift Form must be completed for the permanent records at Grey Roots. A second copy must be completed for the donor if a tax receipt is requested. A second copy may also be completed for the donor in any circumstance upon request. All acquisitions will be assigned an accession number and recorded using the relevant Accession Form.

At the time of donation, if staff determines that a potential donation is better suited to its education or reference library collection (the item does not meet Grey Roots' collecting mandate but the item is still useful for demonstrations or research), the potential donor must sign a Temporary Custody Receipt acknowledging and giving permission for the object to be placed in this non-accessioned collection. The collections manager will notify the Education and Interpretation staff that the item has been added to the education or reference library collection.

When items enter into the Archival Collection via private donation, either by an individual or an organization, they are received through Deed of Gift and accessioned into the collection by means of the Accession Form. Accession may also occur by purchase, which is more infrequent. The Archives prefers the donation of original photographs, but the Photograph Release Form exists as a second best option to allow for a high resolution scan along with the donation of image rights. Similar rights and copyright release forms exist for oral history projects: a Copyright Release Form for the person(s) conducting an oral history interview and a Materials Release Form for the person(s) being interviewed.

The Archives is also a repository for government records. Legislation states ownership for municipal records resides with the creating municipality. In the case of transferred municipal records, the Archives is their permanent custodian as provided under the *Municipal Act, 2001, Sec. 254*. Ultimate ownership and responsibility for the records, access to them and their protection lies with the municipality. It is the responsibility of the Archives to arrange and describe the records, enable access and protect confidential information under the direction of the municipality. Transferring agencies may request temporary return of specific records for short-term administrative use. The Archives also holds provincial land records for Grey County on long-term loan from the Archives of Ontario.

Tax Benefits

Tax receipts will be issued upon request, but not until after the Deed of Gift Form has been signed and the archival material or artefact is in the custody of Grey Roots.

Grey Roots cannot provide the potential donor with any indication of the fair market value of the item(s) before they have been formally donated and an appraisal has taken place. Market value appraisals are outside the preserve of Grey Roots staff. Grey Roots will not offer fair market value assessments of heritage material for any other purpose than tax receipts for donations.

The donor will be informed of the time frame in which he or she may expect a tax receipt at the time of donation. It is the responsibility of the donor to seek expert advice from accountants and/or lawyers regarding the donor's eligibility for tax benefits.

Ethics

The intent of all acquisitions will be to add to the accessioned collections of the Museum and Archives for use in accordance with the Grey Roots' Mission. Once an item is accessioned, it will remain in the Museum or Archives' collections in perpetuity except as provided for under "Essential Criteria for Deaccession", and Grey Roots will not return or relinquish ownership of the item(s) unless an item meets these criteria.

Grey Roots will exercise all rights of ownership over its collections, including rights of display mode or duration, loans, conservation, storage, deaccession and disposal, publication, and photo reproduction as it sees fit.

Grey Roots will not collect for the expressed purpose of market re-sale, although this may be the outcome of a later decision to deaccession and dispose of an artefact or archival item.

No committee or staff members shall use their office or position to acquire artefacts/documents for private collection or personal gain.

Grey Roots will not accept or accession objects into its accessioned collections, which are not legally acquired or rightfully owned by the donor or the estate of the same. All donors, or their legally appointed representative(s), will be charged with full responsibility for establishing their rightful ownership of prospective donations, and will confirm the same by signing the Deed of Gift.

Deaccession

This is the process by which the item(s) is (are) removed from Grey Roots and can be implemented only upon the recommendation of Grey Roots Collections Manager or Archivist (as applicable) to and after approval by, the Planning and Community Development Committee.

De-accessioning is a serious matter. The process, along with the resulting “disposal”, if not carefully handled, can have breach of public trust implications for Grey Roots, compromising its credibility as a repository for heritage collections. Justification for the decision will follow those considerations delineated under *Essential Criteria for Deaccession*.

All deaccessioning processes will adhere to the museum standards set by the Ontario Ministry of Ministry of Tourism, Culture & Sport, and the ethical guidelines of the International Council of Museums (ICOM), the Canadian Museum Association (CMA) and in accordance with provincial and federal legislation.

Essential Criteria for Deaccession

Grey Roots’ right to deaccession, apart from being an automatic right of ownership, shall in practice always be exercised first and foremost in consideration of the trust placed in Grey Roots Museum and Archives by the original donor(s).

In order to undertake the decision whether or not to deaccession, the following will be considered:

1. Relevance to Grey County and Grey Roots’ Mission;
2. Representativeness and completeness of the artefact or archival material; In the interests of protecting Grey Roots from the obligation to store and conserve the item(s) which have become redundant by the acquisition of identical or nearly identical objects in superior condition.
3. Completeness of documentation and provenance;

4. Effective use in current and future exhibitions, research, interpretation and public use;
5. Correcting old accessioning mistakes; sometimes display cases, reproductions, exhibition props, photocopies, library books, etc. are assigned accession numbers relating to enthusiastic cataloguers' activities. Since these were never meant to be part of the accessioned collection, they should be removed.
6. Condition of the item; items that have reached a state of deterioration such that conservation is no longer considered practical or within the means of Grey Roots, or the deterioration or chemical make-up or components pose a serious health risk to staff or risk of damage to other artefacts or archival material should be deaccessioned.
7. Ethical issues related to ethnographic collections and human remains;
8. Restrictions on legal title - this occurs when an individual or their estate can prove superior legal title to the museum. This is commonly in connection to "permanent" or "long-term" loans, or where someone "donated" a work they did not own, or where a "temporary deposit" was never either picked up by the owner or a gift agreement signed.

The right to deaccession is part of the Grey Roots Collections Management Policy and will be carefully explained to all potential donors so that there will be no reason for them to doubt the integrity of the Museum or Archives and, in turn, Grey Roots, in respect to their intended donation.

De-Accessioning Procedure

The recommendation to deaccession an item will be made in the form of a Report to the Planning and Community Development Committee with the reason(s) for the recommendation and an outline of the items' future (i.e. transferal to another non-accessioned collection within the museum or disposal to another museum, etc.).

A record of the de-accession will be entered on its Accession Form, Deed of Gift Form, Accession Form and/or donor file or box (as applicable), which will include: the de-accession date of PCD Committee approval, if the accession is full or partial, the reason for the deaccession, the manner of disposal, and any proceeds from the disposal.

Where an item is deaccessioned because of 1 – 5 under *Essential Criteria for Deaccessioning*, the method of disposal should be in the best interest of the artefact, Grey Roots and the public, by making all effort to keep it in the public domain.

In this vein, disposal of the item may be carried out by first transferring it to another non-accessioned collection within the museum. Artefacts with significant national, regional or local importance should be directed towards appropriate public institutions. After this,

disposal may be made by donating or selling the item to, or trading it with another archive, museum or heritage-based institution, and then another non-profit, public and relevant institution.

If disposal cannot be made by the above methods, and the item retains some possible market value, a reasonable attempt may be made to recover the latter in accordance with the County's [A-FIN-001-001 Purchasing Procedures](#), following its de-accessioning. For this to be practical, such value recovered should considerably outweigh the cost to recover it. Revenue so obtained will go back into the collection, either as new acquisitions funds or for direct care and support costs of the collection.

If the artefact is disposed of by public auction, all object ID numbers and other identification tags/labels will be removed. If it is remaining in the public domain, ID numbers and other identification tags/labels will be discussed with the recipient institution, as they may wish to retain these as part of the object's history.

Where an item is deaccessioned because of 6 under *Essential Criteria for Deaccessioning*, depending on the severity of deterioration, disposal can be left to the discretion of the Collections Manager, or Archivist (as applicable), either by the above method or where practical, by destroying and disposing of all physical remains using reasonable health and safety precautions. The destruction must be witnessed by a representative of the Planning and Committee Development Committee or by both the County Clerk and the Manager, Museum and Archives.

Where an item is deaccessioned because of 7 or 8 under *Essential Criteria for Deaccessioning*, Grey Roots will adhere all applicable laws and/or court orders and be in accordance with professional ethical standards.

Schedule A

Should this/these object(s) be accepted into Grey Roots' permanent artefact collection?

Grey Roots has sufficient resources to care for this object consistent with Museum Standards (staff, HVAC controlled space, specialized containers, etc.)	Yes	No
If "No" the object cannot be accessioned into the permanent artefact collection.		
The object was manufactured or otherwise produced or designed in Grey County	Yes	No
The object is unique in nature – singular or rare (not mass produced)	Yes	No
The object is identified - There is documentation and/or archival support, e.g. photographs, first or second person written or oral history(ies), facsimile advertisements, etc.	Yes	No
There is proven relevance to the Mission of Grey Roots (the object relates to one or more identified interpretive themes)	Yes	No
The object is in good or better condition	Yes	No
The object's potential for present or future exhibition and/or research use is high	Yes	No
There are no donor considerations or conditions	Yes	No

Objects must receive at least six YES scores to be considered for addition to the Grey Roots permanent artefact collection.

If declined for the permanent artefact collection, the Acquisition Committee may consider accepting the item for the Education Collection, as an unencumbered gift of property, or for fundraising purposes.