



Collections Management Policy

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1.00 Introduction

The Canadian Fossil Discovery Centre (CFDC) acknowledges that its fossil collection is inherent to the mission outlined below. This Collections Management Policy will describe the framework in which the CFDC will acquire, manage and ensure the appropriate use of its collection. It is understood that the CFDC will make its collection available for student, faculty and researchers from other institutions to research and study advancing knowledge in the related fields of study. This policy ensures the collection will be available for future generations and not to diminish the collections research value.

2.00 Definitions

Accession – The formal process of accepting any specimen or collection of specimens legally by the Canadian Fossil Discovery Centre as a permanent addition to its collections.

Catalogue – A full complete record of scientific information about a specimen including the process of identification and documentation.

Collection – The accumulation and storage of a grouping of related specimens.

Conservation – The applied science of examination and treatment of specimens including their environment in which they are stored.

Deaccession – The formal process of removing a specimen from the permanent collection.

3.00 Role of Staff Persons

All staff persons at the CFDC must implement and respect the lines of authority as communicated in the CFDC's Organizational Chart. The Collections Managers must report to and receive direction from the Curator. The Curator is responsible to implement the strategic priorities and action plans as provided by the General Manager and as a delegate of the General Manager thereby exercise final decision making ability in relation to this policy.



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4.00 Ethical Considerations

All personnel and volunteers of the CFDC and associated researchers must maintain a high standard of conduct and display a positive attitude towards the collections that avoids conflict of interest in regards to the collection activities outlined and associated within the CFDC's Collections Management Policy. All operations associated with the collections must be consistent with the CFDC's Code of Ethics.

The CFDC personnel, volunteers and associates will perform all collection-related activities for the benefit of the public and not toward any advancement of personal interests.

Under no circumstances is the Canadian Fossil Discovery Centre name to be exploited for personal advantage or the advantage of any other person or entity. Information acquired through any association with CFDC collection procedures must be kept confidential, including fossil localities.

4.10 Personal Collecting

All personnel, volunteers and associated researchers are not permitted to remove any specimens from the collections at any time for personal use.

No personnel, volunteer or researcher associated with the collections may form or expand their own personal collection with the specimens collected in association with the CFDC. There should not be any competition with the individuals and the CFDC with the collection and/or acquisition of specimens or in any personal collecting activity.

All specimens collected and/or acquired through the CFDC will remain as acquisitions and/or accessions within the Collections Department unless deaccessioned by way of the deaccessioned policy as outlined in section 6.0.

4.20 Appraisals

No personnel of the CFDC may make any monetary appraisals on any materials that the CFDC is involved in any way of obtaining or wishing to obtain in the future for the Collections Department. Appropriate trained professionals at the CFDC may make appraisals of specimens for internal use only or for specimens outside the collections if the specimen is not to be added to the permanent collection.



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5.00 Collection Policy

The purpose of the Collection Policy is to provide personnel and volunteers with direction and to reinforce the standard care necessary to fulfill any and all professional and legal obligations related to various aspects of maintaining the objects in the collection and following the proper documentation procedures.

The Collection Policy is the fundamental policy of CFDC governing its collections. The collections, their acquisition, description, preservation, access and use are the heart of a museum and its research and the CFDC Collection Policy enables the principles to do so.

5.10 Acquisition

All specimens acquired by the CFDC are done so to develop and maintain collections in keeping with the CFDC Statement of Purpose. The designated CFDC personnel will only acquire specimens that can be properly documented, preserved, stored and maintained. (Curator or Collection Manager)

Canadian Fossil Discovery Centre personnel must make every effort before the acquisition of a specimen by purchase, gift, loan, bequest or exchange to ensure it has not been illegally obtained and holds a valid title. A full history of the specimen from its discovery or production to its present status should be established prior to acquisition.

The following in no particular order are means of acquiring specimens for the collections department:

- Field collection
- Purchase
- Contract collecting
- Gift
- Bequest
- Exchange
- Loan
- Other appropriate means

All persons collecting for the CFDC as designated by the Curator must follow the CFDC Field Procedures Manual and clearly indicate their relationship with the CFDC to potential vendors or donors.



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Specimens will not be acquired if there is a reasonable cause to believe their recovery involved the unauthorized, unscientific or intentional destruction or damage of geological and palaeontological sites and natural habitats.

Under no circumstances will a specimen be acquired if there has been a failure to disclose the finds to the proper legal or governmental authorities (Heritage Act).

Specimens will only become part of CFDC collections when formally accessioned as outlined below under section 5.2 Accession, therefore the acquired specimens may be prepared or discarded at the discretion and/or direction of the Curator and/or Collections Manager.

5.20 Accession

Accessioning is the formal process to which a specimen is officially part of the permanent collection providing a written record of the acquisition. All record keeping duties are assigned to the Curator ensuring accurate procedures for record keeping is followed.

Accession records are digital including images through a software program created for the CFDC. Only the Collections Manager and designates will have access to alter the accession records. A hard copy and soft copy will be maintained at the CFDC as well as at the Town of Morden Community Resource Office.

Specimens to be accessioned into the permanent collection must meet one or more of the following criteria and are done so by the Curator or Collections Manager:

- Quality of preservation
- Unique or rare specimen
- Data available for modern taxonomic evaluation
- Increase of a specific collection or taxonomic group
- All appropriate scientific data is available
- Size

5.30 Cataloguing

Every specimen within the CFDC collections is assigned a catalogue number. The catalogue number will be placed on the specimen using accepted modern techniques and will be present on the specimen card that is also to be with the specimen in storage.



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Catalogue numbers are to be assigned only by the Collections Manager and will consist of a taxonomic group letter, the year the specimen was found, what number that specimen is of its taxonomic group and the site number. For example M.74.06.06.

All data associated with specimen including taxonomy, geographic location, stratigraphic occurrence, bibliographic reference, accession and other pertinent information to the specimen will be recorded on a digital database. A separate copy will be maintained at the Town of Morden Community Resource Office.

All cataloguing is assigned to the Collections Manager unless designated. The identification and cataloguing of all potential specimens will be done in a timely fashion by the Collections Manager or designates.

5.40 Storage

All specimens within the CFDC collections are to be maintained in the Collection Room in the designated storage area. The specimens are stored accordingly to present-day standards best suited for each specimen, including appropriate materials, open shelving units and metal drawer cabinets.

The storage location of each specimen is to be documented and included in the catalogue system coinciding with the specimen's catalogue number.

Only designated personnel are allowed in the Collection Room. The doors are to be closed and locked at all times only to be accessible through key access. All visitors must acquire permission to access the Collection Room through the Curator, Collections Manager or other designated person(s).

5.50 Loans

Both incoming and outgoing loans are encouraged for scientific purposes. Loan material must be through a Museum, University or other recognized organization in research or education. Prior to any specimen being loaned a formal loan agreement that acts as a contract concerning content, duration and other particulars of the transaction must be acquired and signed by both parties represented in the loan.

The Curator or Collections Manager will use judgment to designate specimens to be loaned or potentially received as specimen safety is of primary consideration.



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If there is a reasonable doubt about the safety (breakage, destruction or other loss) of the specimen being shipped from the CFDC, the specimen will not be shipped.

5.51 Incoming Loans

The Curator prior to research and study must approve all specimens from incoming loans by any CFDC representative. The specimen is to be examined ensuring the agreement is consistent. All records of the transaction of the loan are to be maintained.

5.52 Outgoing Loans

The Curator must approve any specimen for loan to another institution and will not be sent to any private address.

Outgoing loans for display or exhibitions will not exceed 6 months unless an extension is requested and the exhibit must be justified and outlined including props and stands.

Researchers must submit a formal request of the specimens required. Research students must have their advisor sign the formal agreement loan with responsibility designated to the advisor not the student.

6.00 Deaccession Policy

The Canadian Fossil Discovery Centre (CFDC) has a strong commitment towards the retention of all current specimens from its collection. However the CFDC does recognize certain circumstances when deaccessioning can improve the relevance of its collection.

Deaccessioning under this policy is defined as the formal process for removal of a specimen from the permanent CFDC collection and disposal as the permanent transfer of legal title from the CFDC to another institution, group or individual through gift, exchange or sale and in the extreme case purposeful destruction.

The process of deaccessioning must be initiated with a written proposal supported by appropriate documentation and a recommended means of disposition. This proposal must be developed in consultation with the Collections Manager or, Curator. The proposal must be approved by the Executive Director/General Manager, and the Governing Board.



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6.10 Criteria

Specimens to be deaccessioned must meet one or more of the following criteria:

- a specimen does not fit the CFDC mandate
- a specimen is an over-representation of a particular type in the collection
- a specimen is lost or stolen
- a specimen has deteriorated or is damaged
- a specimen is poorly documented and is therefore of limited use
- the CFDC is incapable of providing necessary minimal care
- a specimen is a physical hazard or health risk to staff and public
- a specimen has unethical or illegal provenance
- a specimen has been misidentified or found to be a fake, forgery or copy with no definable purpose

Under no circumstances will the CFDC deaccession a specimen at the request of the donor.

6.20 Procedures for Deaccessioning:

The CFDC must ensure that:

- A proposal for specimen deaccessioning initiated by the Curator or Collections Manager has been submitted to the Executive Director/General Manager and governing Board of Directors for approval and must be documented within the board meeting minutes. Two designated Directors must sign the appropriate documents. If approved all documents must be recorded and obtained.
- The CFDC has legal title to the specimen prior to the commencement of deaccessioning and disposal.
- Serious, diligent and documented effort to locate owners has been made in the case of undocumented material.
- There are no legal or legislative restrictions associated with the specimen when it was acquired, prohibiting deaccessioning.
- Specimens for which a request for return, restitution or repatriation may possibly arise in the future and are to be considered on a case-by-case basis.
- Full documentation of the specimen prior to deaccessioning including a recent catalogue record is conducted. All documents are to be obtained by the CFDC with an image of the specimen.
- A copy of the recent documentation of the specimen is to be provided to the recipient of the deaccessioned specimen.



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6.30 Procedures for Disposition:

The CFDC must display efforts to ensure the deaccessioned specimens remain within the public domain through gift, exchange or sale with other museums, universities or public institutions before other means of disposal. Emphasis should be placed on retaining the specimen within the community and Manitoba and then Canada.

On no occasion will volunteers, staff, Board of Directors, their family members or any organizations associated with any financial support be permitted to purchase any specimens for disposal, nor will the specimens be sold on the CFDC premises.

If a specimen is to be disposed, the Board of Directors may consider notifying the original donor as a courtesy. If the specimen is to be for sale as a method of disposal, intention of the disposal should be made public at least 3 months in advance through appropriate media.

All tags or markings that will identify the specimen from the CFDC must be removed prior to disposal.

The following are methods for the disposition of deaccessioned specimens from the CFDC collection:

- I. **Exchange** – exchange the specimens with another museum, university or public institution.
- II. **Gift** – donation/transfer of specimen to another local, provincial or national museum, university or public institution.
- III. **Sale** – sale of disposition specimens is outlined by the following means in order of preference:
 - to a museum, university or public institution or the original donor
 - through a publicly advertised auction
 - through a dealer, established and reputable

All funds acquired from sales must be used to support the CFDC collection. New items purchased for the collection through these funds must show acknowledgement to the original owners.

- IV. **Internal Transfer** – transfer of the specimen within the CFDC for non-collection use (e.g. destructive analysis, school/education etc.).
- V. **Destruction** – the specimen is to be destroyed when no other method of disposal is possible. Destruction must ensure the specimen cannot be reconstructed in any way. Two witnesses must be present to observe the destruction.



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The Deaccessioning Policy of the Canadian Fossil Discovery Centre may be amended only on the recommendation of the governing Board of Directors by a majority of members present at an Annual Meeting or at a meeting of members called for that purpose.

7.00 Conservation Policy

The Canadian Fossil Discovery Centre (CFDC) recognizes the importance of preserving the collections entrusted to its care by delegating a Collection Manager who is responsible for the care and management of the fossil collection; demonstrating a commitment to establish and maintain modern professional museum standards for temperature, humidity, and lighting controls; a commitment to protecting the collection from fire, flood, vandalism, theft, pests, poor handling and improper display conditions; a commitment to clean, orderly, and safe storage; a commitment to collaborate with and seek guidance from qualified experts in conservation (e.g. Manitoba Heritage Conservation Service, the Society for the Preservation of Natural History Collections, the Society of Vertebrate Paleontology, etc.) before undertaking cleaning, repair, or restoration of fossil specimens; a commitment to keep and maintain accurate records of any alterations, repairs, and/or fossil preparation; and a commitment to undertake professional development training via courses, workshops, and attending professional conferences and symposia to improve our knowledge in the care and handling of the fossil collection.

7.10 Role of the Collection Manager

The Collections Manager is expected to follow the direction that is provided by the Curator. The Collection Manager is responsible for the overall preservation, documentation and management of the CFDC's fossil collection both in the field and the museum. The Collection Manager will accession, deaccession, collect specimens, process loans, complete reports and appropriate forms, care for the collection in terms of storage, maintenance and security and public access to designated individuals. The Collection Manager will work closely with the Curator and the Collections Management Policy.

7.20 Environmental Control Management

The Collection Manager will install and continually upgrade temperature and humidity monitoring devices in the collection room and monitor and record the temperature and relative humidity on a daily basis. The Collection Manager will also work on granting to obtain and install environmental controls for the fossil collection while stored in the



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collection room and while on exhibit. Lighting controls should be installed in accordance with modern professional techniques and standards for the care and conservation of the fossils and all associated material while on display and in storage.

7.30 Protection and Security

The CFDC houses Canada's largest collection of marine reptile fossils and as such, the protection and security of the collection must be constantly maintained. As part of the Conservation Policy, the Collection Manager will oversee and be responsible for the protection of the collection during storage or transport, and protection from rot, decay, pests, fire, flood, tornado, etc., and for taking the necessary security measures to protect the collection against vandalism and theft.

7.40 Collaborative Guidance

Whenever possible and relevant, the CFDC will seek out collaborative guidance from qualified and recognized experts in specific fields to enhance the CFDC's current techniques before undertaking any cleaning, repair, or preparation of unfamiliar fossils. Visiting researchers and laboratory technicians, as well as conferences and symposia, are some examples of occasional guidance opportunities. The Manitoba Heritage Conservation Service, the Society for the Preservation of Natural History Collections, and the Society of Vertebrate Paleontology are the CFDC's preferred organizations to seek guidance and expertise from regarding vertebrate fossil collections and efforts will be made to consult with these organizations when appropriate.

7.50 Record Keeping

As a steward for the province of Manitoba's vertebrate fossils, the CFDC holds a strong commitment to maintaining proper up to date record keeping practices concerning all aspects of the collection. From field collection data to research data and laboratory work sheets, records will be kept on any alterations or repairs during preparation. Records will be kept for each specimen in both a digital (electronic) and hard copy format at the CFDC while a second backup copy of the digital collection records will be stored at the Town of Morden Office.



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7.60 Professional Development

To demonstrate the CFDC's commitment to the handling, conservation, and care of the collection, the Collection Manager, staff, and volunteers working with objects from the collection should seek out professional development courses, workshops, conferences, and symposia so as to keep up with modern practices and techniques while becoming increasingly more knowledgeable and proficient in the overall management and conservation of the fossil collection.

8.00 Policy Review

Every 2 years the Board of Directors will review the Collections Management Policy of the Canadian Fossil Discovery Centre Inc. at the last meeting of the year.

9.00 References

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