

# REAPPLICATION WORKBOOK



For Recognized Museums, the Reapplication is the second step in your Recognized Museum Program (RMP) journey. Your first step is completing the Institutional Profile. If you have not already completed the Institutional Profile, please visit the [AMA's website](#) for more information, or contact the Program Lead at [recognized@museums.ab.ca](mailto:recognized@museums.ab.ca) or 780.424.2626.

If your institution is not currently a Recognized Museum, you need to complete the Application. Please [click here](#) to learn about the Application process.

The Reapplication consists of ten pieces of Core Evidence to demonstrate that your museum has maintained best practice standards since your last accreditation.

- Plan - Strategic **or** Operational **or** Business
- Financial Planning - Financial Statements **or** Operating Budget
- Summary of Community Engagement
- Open to the Public - Accessibility
- Collections Management Policy
- Preventive Conservation
- Emergency Plan
- Example of Research - one example from the past two years
- Example of Interpretation - one example from the past two years
- Example of Exhibits - one example from the past two years

\*If your institution indicated in the Institutional Profile it changed collections management systems in the past five years, the following two pieces of Evidence must also be submitted:

- Page from Accession Register
- Three Catalogue Records

All applicants must also affirm that senior staff or representatives from your institution's governing authority (e.g., Board of Directors) have reviewed the completed application. They must also confirm that they reviewed and unconditionally support the Required Readings in Section 1.

All ten pieces of Evidence must be submitted and meet the Minimum Requirements and Standards as assessed by the Review Panel in order to attain Recognized Museum designation. Institutions that do not currently have all the required Evidence are still encouraged to participate in the Program. Candidates in RMP have up to three years and access to additional AMA resources such as the AMA Grants Program to support them in attaining the Recognized Museum designation.

Learn more about the various stages of participation [here](#).



The following resources are available to assist you in completing your Reapplication:

- **Reapplication PDF:** This document is the Reapplication questions for reapplicants. Please note the PDF is a reference tool and is not the official reapplication.
- **Reapplication Workbook:** This Workbook includes all of the questions in the reapplication, along with supporting information such as Definitions, Standards, and Minimum Requirements. It is a fillable tool to help your institution prepare the Evidence required for submission.
- **Draft Review:** Between June 1 and September 15, you can access [this link](#) to complete your Reapplication for Draft Review. For more information on how to use Formstack, please [click here](#).
- **Formstack Reapplication Form:** You can complete your institution's reapplication online for official submission at [this link](#). The reapplication deadline is November 30. You can start filling in the online form up to 30 days prior to making your final submission. We recommend compiling all your answers and Evidence in the Workbook ahead of time for a smoother submission process.

Please visit the [RMP Frequently Asked Questions](#) on the AMA's website for more information. If you have any further questions, please contact the Program Lead at [recognized@museums.ab.ca](mailto:recognized@museums.ab.ca) or 780.424.2626.



## HOW TO USE THE REAPPLICATION WORKBOOK

The Reapplication Workbook is a resource to help your institution prepare the Evidence required for the Reapplication. Below is a breakdown of how to use the worksheets to prepare your Reapplication.

## HOW DOES THIS SECTION RELATE TO THE DEFINITION OF A MUSEUM?

This indicates how each section of the Reapplication connects to the AMA's member-approved Definition of a Museum:

"A museum is a non-profit making, permanent institution in the service of society and of its development, and open to the public which acquires, conserves, researches, communicates and exhibits, for purposes of study, education and enjoyment, material evidence of people and their environment."

This will tell you which aspect of the definition you are addressing.

## WHY IS THIS SECTION IMPORTANT?

This will provide an explanation of why the Evidence is required and how it connects to best practice Standards.

## USEFUL DEFINITIONS:

These definitions will help you complete each section of the Reapplication. All definitions are found in the *Standard Practices Handbook for Museums, 3rd Edition* (the Handbook) Glossary. Definitions with footnotes are found within the main text of the *Handbook*.

## WHERE CAN I FIND MORE INFORMATION?

This directs you to the pages of the *Handbook* that provide additional information about the Evidence required.

## WHAT EVIDENCE DO I NEED TO SUPPLY?

This is where you will find what is required for the section. The Evidence is either a list of questions you need to answer or a document you need to upload when you complete the Reapplication. For documents, this section also includes instructions on how to label the files before uploading them.

## WHAT STANDARDS DOES THE EVIDENCE DEMONSTRATE?

These are the Standards from the *Handbook* demonstrated by fulfilling the Minimum Requirements for each piece of Evidence.

## WHAT ARE THE MINIMUM REQUIREMENTS?

These are the criteria the Review Panel will use to determine if the Evidence submitted meets the Minimum Requirements for accreditation. The Review Panel will be provided with an Assessment Form that outlines each of these points. All Minimum Requirements must be included to fulfill the Standard(s) for the section.

## HOW WILL WE GET THIS DONE?

This is a space for you to plan how you will prepare the Evidence for submission, including who is responsible for preparing the Evidence, when it is due, and any notes to assist in that work. This is a planning tool for reapplicants and is not required by the Review Panel.

## TIPS AND TRICKS

These are additional resources and helpful hints to assist in completing each section of the Reapplication.



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## Required Readings and Declaration of Signing Officers

### How does this section relate to the Definition of a Museum?

*Museums are non-profit making.*

### Why is this section important?

Are you familiar with museum ethics and best practice guidelines? This section of the Reapplication is meant to ensure that your senior staff and governing authority have reviewed and unconditionally support the ethical obligations of public trust institutions.

### What Evidence do I need to supply?

Please confirm that senior staff or senior representatives from your institution's governing authority (e.g., Board of Directors) have reviewed and unconditionally support the following foundational documents:

- Objects of the Alberta Museums Association
- Alberta Museums Association's Member-Approved Definition of a Museum
- Alberta Museums Association Bylaws
- Alberta Museums Association Strategic Framework
- Alberta Museums Association Principles and Guidelines for Alberta's Museum Community
- Alberta Museums Association Deaccessioning and Disposal of Collections Overview
- Canadian Museums Association Ethics Guidelines
- Alberta Museums Association Sustainability Working Group Recommendations Report

### DECLARATION OF SIGNING OFFICERS

- Two senior staff or senior representatives from your institution's governing authority affirm they have reviewed the application and declare the information is true and representative of current practice in your institution.
- Two senior staff or senior representatives from your institution's governing authority affirm that they understand the Recognized Museum designation is the property of the Alberta Museums Association and that if any part of this application misrepresents your institution, the Alberta Museums Association has the right to revoke the Recognized Museum designation.

Please provide the names and titles of two senior staff or senior representatives from your institution's governing authority who have reviewed and unconditionally support all of the foundational documents listed above, and affirm the declaration statements.

1. Name: \_\_\_\_\_

Title: \_\_\_\_\_

2. Name: \_\_\_\_\_

Title: \_\_\_\_\_

# 1

## Recognized Museum Program REAPPLICATION WORKBOOK

# FOUNDATIONAL DOCUMENTS



### What Standards does the Evidence demonstrate?

**Standard 1.6.2** Members of the governing authority recognize and fulfill their fiduciary duties with respect to the museum's finances, collections, programs, and services.

**Standard 1.7.1** The museum has adopted or developed a code of ethics that defines institutional ethical standards and personal professional conduct.

**Standard 1.7.2** Museum staff and volunteers follow generally acknowledged standards and guidelines relating to their work.

### What are the Minimum Requirements?

Representatives are members of your institution's senior staff or senior members of your institution's governing authority

### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

# 2

## Recognized Museum Program REAPPLICATION WORKBOOK PERMANENT INSTITUTION



### SECTION 2.1 Plan

Please select **one** of the following three planning documents from your institution to submit as Evidence:

- 2.1A Strategic Plan     2.1B Operational / Institutional Plan     2.1C Business Plan

#### 2.1A STRATEGIC PLAN

##### How does this section relate to the Definition of a Museum?

*Museums are permanent.*

##### Why is this section important?

Is your institution on firm footing? This section of the Reapplication ensures that your institution is organizationally stable and engages in long-term planning.

##### Useful Definitions:

**Strategic Plan:** Document that sets the direction for the organization; provides a starting point to determine the possible resources required to work toward fulfilling the direction. A strategic plan provides the organization with direction for its future requirements, as well as its current needs.

##### Where can I find more information?

Please refer to Section 2.6 - Planning (pages 79 - 84) in the *Handbook*.

##### What Evidence do I need to supply?

You will be asked to upload the following planning document from your institution:

- Strategic Plan

Please label the file using the format *InstitutionName\_Section2.1A\_YEAR*.

##### What Standards does the Evidence demonstrate?

**Standard 2.6.1** The museum uses planning to consider a range of possibilities and priorities, and to clarify its actions and decisions.

**Standard 2.6.2** Planning is based on realistic projections of the museum's capabilities.

##### What are the Minimum Requirements?

The Strategic Plan must:

- be a formal planning document
- be institution-wide in scope
- be at least one year in scope
- be consistent with the Mission Statement in your Institutional Profile
- be action-oriented
- be approved by your institution's governing authority
- be currently in use (at time of reapplication)
- be realistic given staff and volunteer capacity (involves people)

# 2

## Recognized Museum Program REAPPLICATION WORKBOOK PERMANENT INSTITUTION



### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

*Remember...*

*A Strategic Plan does not need to include financial planning, but it should set a clear direction for your institution.*



# 2

## Recognized Museum Program REAPPLICATION WORKBOOK PERMANENT INSTITUTION



### 2.1B OPERATIONAL / INSTITUTIONAL PLAN

#### How does this section relate to the Definition of a Museum?

*Museums are permanent.*

#### Why is this section important?

Is your institution on firm footing? This section of the Reapplication ensures that your institution is organizationally stable and engages in long-term planning.

#### Useful Definitions:

**Operational Plan:** Details the organization's shorter-term objectives, lists those responsible for the execution of the objectives, and states the timeframe in which they must work. This document provides a strong overview of the human resource capacity, skills, expertise, and knowledge that the museum will need to complete its goals.

#### Where can I find more information?

Please refer to Section 2.6 - Planning (pages 79 - 84) in the *Handbook*.

#### What Evidence do I need to supply?

You will be asked to upload the following planning document from your institution:

- Operational / Institutional Plan

Please label the file using the format *InstitutionName\_Section2.1B\_YEAR*.

#### What Standards does the Evidence demonstrate?

**Standard 2.6.1** The museum uses planning to consider a range of possibilities and priorities, and to clarify its actions and decisions.

**Standard 2.6.2** Planning is based on realistic projections of the museum's capabilities.

#### What are the Minimum Requirements?

The Operational / Institutional Plan must:

- be a formal planning document
- be institution-wide in scope
- be at least one year in scope
- be consistent with the Mission Statement in your Institutional Profile
- be action-oriented
- be approved by your institution's governing authority
- be currently in use (at time of reapplication)
- be realistic given staff and volunteer capacity (involves people)
- include a financial plan

#### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

#### Keep in mind...

*A good Operational / Institutional Plan includes a discussion of your institution's finances and activities, and the people (staff and volunteers) needed to achieve your goals for the future.*

# 2

## Recognized Museum Program REAPPLICATION WORKBOOK PERMANENT INSTITUTION



### 2.1C BUSINESS PLAN

#### How does this section relate to the Definition of a Museum?

*Museums are permanent.*

#### Why is this section important?

Is your institution on firm footing? This section of the Reapplication ensures that your institution is organizationally stable and engages in long-term planning.

#### Useful Definitions:

**Business Plan:** A document that details the organization's financial case, ensuring financial success, guiding performance, and ensuring sustainability of the organization / project as a vehicle for achieving larger goals.

#### Where can I find more information?

Please refer to Section 2.6 – Planning (pages 79 – 84) in the *Handbook*.

#### What Evidence do I need to supply?

You will be asked to upload the following planning document from your institution:

- Business Plan

Please label the file using the format *InstitutionName\_Section2.1C\_YEAR*.

#### What Standards does the Evidence demonstrate?

**Standard 2.6.1** The museum uses planning to consider a range of possibilities and priorities, and to clarify its actions and decisions.

**Standard 2.6.2** Planning is based on realistic projections of the museum's capabilities.

#### What are the Minimum Requirements?

The Business Plan must:

- be a formal planning document
- be institution-wide in scope
- be at least one year in scope
- be consistent with the Mission Statement in your Institutional Profile
- be action-oriented
- be approved by your institution's governing authority
- be currently in use (at time of reapplication)
- include a financial plan

#### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

#### Keep in mind...

*Your Business Plan does not need to include planning regarding staff and volunteers, but it does need to include financial planning.*



## SECTION 2.2 Financial Planning

Please select **one** of the following two items to submit as Evidence:

- 2.2A Financial Statement     2.2B Operating Budget

### 2.2A FINANCIAL STATEMENTS

#### How does this section relate to the Definition of a Museum?

*Museums are permanent.*

#### Why is this section important?

Is your institution on firm footing? This section of the Reapplication ensures that your institution is financially sustainable.

#### Useful Definitions:

**Financial Reporting:** A system used by the museum to account for its income and expenses. Financial reports present the museum's financial activities and the financial condition of the museum's operations.<sup>1</sup>

**Financial Statements:** A document that records aspects of the museum's financial activities. By analyzing the statements, managers are able to assess the museum's financial status. Financial statements normally include a balance sheet and an income statement, which summarize the museum's financial transactions and classify them either as revenue or expenses, assets or liabilities.<sup>2</sup>

#### Where can I find more information?

Please refer to Section 2.7 - Financial Management (pages 85 - 94) in the *Handbook*.

#### What Evidence do I need to supply?

You will be asked to upload the following financial document from your institution:

- Financial Statements for the most recently completed fiscal year  
 Please label the file using the format *InstitutionName\_Section2.2A\_YEAR*.

#### What Standards does the Evidence demonstrate?

**Standard 2.7.2** The museum's financial stability is a balance between the museum's values, vision, mission, and goals and the funds available to continue operating effectively.

**Standard 2.7.3** Final authority for all financial outcomes rests with the governing authority.

#### What are the Minimum Requirements?

The Financial Statements must:

- be audited and signed by auditor
- show audited financial activities including income, disbursements, assets, and liabilities
- be from the most recent completed fiscal year
- show that your institution's collections are not listed as an asset that can be used to meet financial obligations by conversion into currency or as security for monetary loans

<sup>1</sup> Crystal Willie, ed., *Standard Practices Handbook for Museums*, 3rd ed. (Edmonton: Alberta Museums Association, 2014), 87.

<sup>2</sup> Ibid., 87.

# 2

## Recognized Museum Program REAPPLICATION WORKBOOK PERMANENT INSTITUTION



### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

*Keep in mind...*

*The Review Panel is looking for proof of effective financial management. Either a professional audit or an internal audit is acceptable.*

# 2

## Recognized Museum Program REAPPLICATION WORKBOOK PERMANENT INSTITUTION



### 2.2B OPERATING BUDGET

#### How does this section relate to the Definition of a Museum?

*Museums are permanent*

#### Why is this section important?

Is your institution on firm footing? This section of the Reapplication ensures that your institution is financially sustainable.

#### Useful Definitions:

**Budget:** A financial plan that estimates what the museum's income and expenses will be over a given operating period.

**Operating Budget:** A document that defines the relationship between the money taken in by the museum as income and the money expended by the museum to support its administration, programs, and services.<sup>3</sup>

#### Where can I find more information?

Please refer to Section 2.7 - Financial Management (pages 85 - 94) in the *Handbook*.

#### What Evidence do I need to supply?

You will be asked to upload the following financial document from your institution:

- Operating Budget for the current fiscal year (at time of reapplication)  
Please label the file using the format *InstitutionName\_Section2.2B\_YEAR*.

#### What Standards does the Evidence demonstrate?

**Standard 2.7.5** The governing authority reviews and approves the museum's budget in relation to the goals, objectives, and priorities of the museum.

#### What are the Minimum Requirements?

The Operating Budget must:

- include revenues and expenses
- be institutional in scope
- be approved by your institution's governing authority
- cover the current fiscal year (at time of reapplication)

#### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

#### Remember...

*Ideally, museums should strive to ensure that the budget is balanced and expenses do not exceed revenue.*

<sup>3</sup> Ibid., 87.

# 3



### SECTION 3.1 Community Engagement

#### How does this section relate to the Definition of a Museum?

*Museums serve society and its development*

#### Why is this section important?

How does your institution serve society? This section of the Reapplication ensures that your institution understands the needs of its community and responds to them.

#### Useful Definitions:

**Community:** Commonly refers to people living in the same physical location. However, a broader interpretation encompasses various forms of association that bond people together, including a common interest, objective, language, profession, religion, tradition, economy, history, or other common experience or traits.

**Community Engagement:** "People working collaboratively, through inspired action and learning, to create and realize bold visions for their common future." For museums, this means working with the people in their communities to identify the important issues that people care about and what role the museum can play in making a difference.

#### Where can I find more information?

Please refer to Section 1.2 - Museums and Communities (pages 20 - 23) in the *Handbook*.

#### What Evidence do I need to supply?

How does your institution respond to and meet needs in its community? Using an example from the past **three** years, please briefly answer the following questions.

- A. What important community issue did your institution want to address? (Limit 1,000 characters)

- B. How did your institution determine that this issue was important to the community? (Limit 1,000 characters)

# 3

## Recognized Museum Program REAPPLICATION WORKBOOK

# IN THE SERVICE OF SOCIETY



C. How did your institution help the community address this important issue? (Limit 1,000 characters)

D. Who in the community benefitted from your institution's actions? This can be groups, organizations, or individuals. (Limit 1,000 characters)

E. How did you determine that the community benefitted from your institution's actions? (Limit 1,000 characters)

F. How did these actions support your institution's Mission Statement? (Limit 1,000 characters)

# 3

## Recognized Museum Program REAPPLICATION WORKBOOK IN THE SERVICE OF SOCIETY



G. When did this community engagement activity take place, including the year? (Limit 250 characters)

### What Standards does the Evidence demonstrate?

**Standard 1.1.6** The museum acknowledges its role as a socially responsible member of the community.

**Standard 1.1.7** The museum engages and partners with other civic organizations and institutions in developing solutions to community issues and participating in community life.

### What are the Minimum Requirements?

The responses to the questions must:

- be from the past three years
- identify a specific community
- identify and address an issue the community cares about
- focus on building a better community

### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

*Check out...*

**The Transformative Power of Community Engagement** - a keynote address by Candace Tangorra Matelic presented as part of the AMA's Community Engagement Initiative in August 2013. It provides information about community engagement and how it can help your institution thrive.



# 4

## Recognized Museum Program REAPPLICATION WORKBOOK OPEN TO THE PUBLIC



### SECTION 4.1 Accessibility

#### How does this section relate to the Definition of a Museum?

*Museums are open to the public.*

#### Why is this section important?

How do you ensure that your institution is accessible to the public? This section of the Reapplication ensures that your institution can be enjoyed by as many members of the community as possible.

#### Useful Definitions:

**Access:** A fundamental responsibility of museums, requiring them to make their resources available to all potential users. Access provision can be considered in both physical and intellectual terms. In terms of physical access, museums should take steps to provide barrier-free access that accommodates people who use wheelchairs; people with reduced hearing or visual ability; and people with reduced stamina, strength, dexterity, and speed. Intellectual access includes access to information, to the decision-making processes that underlie museum work, and to resources ranging from gallery space to the repatriation of cultural artifacts.

#### Where can I find more information?

Please refer to Section 1.3 – Providing Access (page 29 – 30) in the *Handbook*.

#### What Evidence do I need to supply?

Below is a list of actions museums can take to ensure accessibility. Please indicate which of the following your institution does and briefly describe your actions. Please check all that apply.

- Advertise and promote accessible services (Limit 500 characters)

- Provide materials in Braille and other support for visitors with visual impairments (Limit 500 characters)

- Provide materials in languages other than English (Limit 500 characters)

# 4

## Recognized Museum Program REAPPLICATION WORKBOOK OPEN TO THE PUBLIC



Provide sign language and other support for visitors with hearing impairments (Limit 500 characters)

Provide ramps, elevators, accessible washrooms, and other physical designs to increase accessibility (Limit 500 characters)

Provide training for staff in working with persons with disabilities (physical and intellectual) (Limit 500 characters)

Provide programs, services, and access designed for people with disabilities (physical and intellectual) (Limit 500 characters)

Provide gender neutral washrooms (Limit 500 characters)

Provide sensitivity training for staff (e.g., KAIROS Blanket Exercise™, LGBTQ2+ sensitivity training) (Limit 500 characters)

# 4

## Recognized Museum Program REAPPLICATION WORKBOOK OPEN TO THE PUBLIC



Other (Limit 500 characters)

### What Standards does the Evidence demonstrate?

**Standard 1.3.7** Access to programs and services is an essential aspect of museum planning.

**Standard 1.3.8** The museum is accessible to the public and provides a safe, comfortable environment for visitors while ensuring the security of museum property.

### What are the Minimum Requirements?

The answers to the questions must:

demonstrate that your institution is committed to ensuring accessibility for visitors

### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

*Keep in mind...*

*Accessibility is about finding ways to ensure that your spaces, programs, exhibits, and services are engaging to visitors by removing physical, social, and intellectual barriers.*



## SECTION 5.1 Collections Management Policy

### How does this section relate to the Definition of a Museum?

*Museums acquire the material evidence of people and their environment for the purposes of study, education, and enjoyment.*

### Why is this section important?

How do you manage your collections? This section of the Reapplication ensures that your institution has a coherent Collections Management Policy.

### Useful Definitions:

**Acquisitions:** Objects to which the museum has legal title of ownership. Museums generally acquire objects by donation, purchase, or field collecting. In each case, the museum is obligated to obtain appropriate documentation of the transaction, confirming that legal title to the objects has been transferred. This documentation establishes the museum's legal ownership of its collections. Acquisitions should also conform to ethical guidelines governing individuals and institutions within the museum profession.

**Collections Management Policy:** A written statement that explains how and why the museum collects, and articulates the professional Standards it follows for objects in its care. The purpose of the policy is to define areas of responsibility and provide guidelines for decision making. It also serves as a source of information for the public. The policy should be detailed enough to address issues and concerns faced by the museum with respect to its collections, but avoid specifying the actual procedures to be followed.<sup>4</sup>

**Deaccession:** The process, formally approved by the museum's governing authority, of permanently removing an object from the museum's collections. All deaccessions must be documented in the collection records.

### Where can I find more information?

Please refer to Section 3.1 – Collections and the Public Trust (pages 143 – 147) in the *Handbook*.

### What Evidence do I need to supply?

You will be asked to upload a copy of your institution's Collections Management Policy.

Collections Management Policy

Please label the file using the format  
*InstitutionName\_Section 5.1\_YEAR*.

### What Standards does the Evidence demonstrate?

**Standard 2.4.4** Written policies and procedures clarify what the museum's organizational priorities are and how the museum operates.

**Standard 3.1.1** The museum formally recognizes that its collections are acquired, cared for, shared, and deaccessioned in accordance with its public trust responsibilities.

### What are the Minimum Requirements?

The Collections Management Policy must contain:

- a collections mandate
- information about object acquisition
- information about temporary custody
- information about incoming and outgoing loans
- guidelines for general care
- a schedule for review of your institution's Collections Management Policy
- a date of approval
- deaccession and disposal procedures consistent with the AMA's *Deaccessioning and Disposal of Collections Overview*
- content which is not contradictory to other parts of your Reapplication

<sup>4</sup> Ibid., 144.

# 5

## Recognized Museum Program REAPPLICATION WORKBOOK ACQUIRE



### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

#### *Check out...*

*The Alberta Museums Association [Deaccessioning and Disposal of Collections Overview](#) document provides important information to help your institution meet the Minimum Requirements.*



## SECTION 5.2 Page from Accession Register\*

\*If your institution indicated in the Institutional Profile it changed collections management systems in the past five years, the following section must also be submitted:

### How does this section relate to the Definition of a Museum?

*Museums acquire the material evidence of people and their environment for the purpose of study, education, and enjoyment.*

### Why is this section important?

How do you keep your institution's collections organized? This section of the Reapplication ensures that your institution maintains a consistent and permanent ledger of the objects in its collections.

### Useful Definitions:

**Accession Register:** A sequential record that lists every object in the museum's collections. Entries are made in chronological order, as each object is entered at the time it was accepted by the museum. The accession register documents the museum's legal rights to its collections.

### Where can I find more information?

Please refer to Section 3.5 – Registration and Record Keeping (pages 169 – 180) in the *Handbook*.

### What Evidence do I need to supply?

You will be asked to upload a copy of a page from the most recent year of your institution's accession register. It should show consistent numbering and a unique number for each object.

Please label the file using the format *InstitutionName\_Section5.2\_YEAR*.

If the most recent year of accessions is not the current year, please explain why.

### What Standards does the Evidence demonstrate?

**Standard 3.5.1** The museum acknowledges the importance of maintaining formal records pertaining to its collections.

**Standard 3.5.2** A consistent system for recording information has been adopted.

**Standard 3.5.3** The museum maintains a permanent, official record of all its holdings.

**Standard 3.5.4** All objects in the museum's collections are registered.

### What are the Minimum Requirements?

The page from the accession register should not be blank. It should show:

- that it is from the most recent year of accessions
- that your accession register is a master list of multiple accessions
- unique accession numbers that align with the example you provided in the Institutional Profile
- the date the object entered your institution
- the date the object was accessioned
- the number of objects per accession number
- a name and brief description of the object
- how the object was acquired
- the name and contact information for the object's source or donor

# 5

## Recognized Museum Program REAPPLICATION WORKBOOK ACQUIRE



### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

#### *Keep in mind...*

*Your submission must be either a photocopied page from a hard-copy accession register or a report from a collections management database program. This page should be part of a master list of multiple accessions from your institution's most recent year of collecting.*

## SECTION 6.1 Preventive Conservation

### How does this section relate to the Definition of a Museum?

*Museums conserve the material evidence of people and their environment for the purposes of study, education, and enjoyment.*

### Why is this section important?

How do you care for the objects in your institution's collections? This section of the Reapplication ensures that your institution reduces potential harm and damage to its collections.

### Useful Definitions:

**Preventive Conservation:** Measures (other than invasive procedures) designed to slow or halt the deterioration of objects and specimens, or to protect them from potential damage. Prevention focuses primarily on measures designed to protect collections from the ten agents of deterioration. It requires an active program of controlling light and ultraviolet (UV) levels in exhibits, monitoring and controlling temperature and relative humidity in collection areas, and using risk management strategies for pest control and disaster prevention.

### Where can I find more information?

For more information, please refer to Section 4.2 - Preventive Conservation (pages 212 - 218) of the *Handbook*.

### What Evidence do I need to supply?

From the following list, please select **three** agents of deterioration that currently threaten your institution's collections. For each agent that you select, please answer the questions below.

- Physical forces
- Thieves and vandals
- Dissociation or misplacement
- Fire
- Water
- Pests
- Pollutants
- Ultraviolet, infrared, or visible light
- Incorrect temperature
- Incorrect relative humidity

**AGENT ONE:** \_\_\_\_\_

- A. Please explain why this agent of deterioration threatens your institution's collections. (Limit 500 characters)



# 6

Recognized Museum Program  
**REAPPLICATION WORKBOOK**  
**CONSERVE**



B. Please provide **two** examples of how your institution protects its collections from this agent of deterioration. (Limit 1,500 characters)

C. How do you determine that the measures you are taking are effective? (Limit 1,500 characters)

**AGENT TWO:** \_\_\_\_\_

A. Please explain why this agent of deterioration threatens your institution's collections. (Limit 500 characters)

# 6

Recognized Museum Program  
**REAPPLICATION WORKBOOK**  
**CONSERVE**



B. Please provide **two** examples of how your institution protects its collections from this agent of deterioration. (Limit 1,500 characters)

C. How do you determine that the measures you are taking are effective? (Limit 1,500 characters)

**AGENT THREE:** \_\_\_\_\_

A. Please explain why this agent of deterioration threatens your institution's collections. (Limit 500 characters)

# 6

## Recognized Museum Program REAPPLICATION WORKBOOK CONSERVE



B. Please provide **two** examples of how your institution protects its collections from this agent of deterioration. (Limit 1,500 characters)

C. How do you determine that the measures you are taking are effective? (Limit 1,500 characters)

### What Standards does the Evidence demonstrate?

**Standard 4.2.2** The museum uses preventive conservation practices to provide a safe and stable environment for its collections.

### What are the Minimum Requirements?

The responses to the questions must:

- answer questions asked
- demonstrate that threats identified are appropriate to your institution
- show that appropriate action is taken to address each threat
- demonstrate your institution's understanding of preventive conservation
- demonstrate that your institution has ongoing preventive conservation actions in place
- be examples of current activities

# 6

## Recognized Museum Program REAPPLICATION WORKBOOK CONSERVE



### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

#### *Did you know?*

*The Canadian Conservation Institute (CCI) [has resources](#) about each of the ten agents of deterioration to help museum professionals build their understanding of preventive conservation.*



## SECTION 6.2 Emergency Plan

### How does this section relate to the Definition of a Museum?

*Museums conserve the material evidence of people and their environment for the purpose of study, education and enjoyment.*

### Why is this section important?

How will you ensure the safety of staff, volunteers, and visitors, as well as your collections and facility, in the event of an emergency? This section of the Reapplication ensures that your institution plans for the worst.

### Useful Definitions:

**Emergency:** A sudden event demanding immediate attention and action.

**Disaster:** An emergent situation of large scale and calamitous consequences; greater in scale and repercussions than an emergency.

### Where can I find more information?

Please refer to Section 2.12 – Risk Management (pages 122 – 131) of the *Handbook* and Chapter 1 of *Help! An Emergency Preparedness Manual for Museums, 2nd Edition*.

### What Evidence do I need to supply?

You will be asked to upload a copy of your institution's Emergency Plan.

Emergency Plan

Please label the file using the format *InstitutionName\_Section6.2\_YEAR*.

### What Standards does the Evidence demonstrate?

**Standard 2.12.1** The museum undertakes to protect its visitors, staff, and collections from hazards and natural disasters.

**Standard 2.12.3** The museum undertakes a continuous, systematic analysis of its security policy and procedures.

**Standard 2.12.4** The museum ensures that its collections are secured.

### What are the Minimum Requirements?

The Emergency Plan must:

- focus on the safety of staff, volunteers, and visitors
- focus on the safety of collections and the facility
- align with your institution's Mission Statement and Collections Management Policy
- clearly delegate a chain of command and responsibilities in the event of emergency
- consider emergency and disaster situations that are appropriate to your institution
- have procedures for before, during, and after an emergency / disaster
- be current and reviewed by the appropriate authority in the past two years

### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

*Did you know? As part of Help! An Emergency Preparedness Manual for Museums, 2nd Edition, the AMA has created **Tear-Out 1.5 - Emergency and Disaster Plan Template** that you can access online to assist with this section of the Reapplication.*

## SECTION 7.1 Examples of Research

### How does this section relate to the Definition of a Museum?

*Museums research the material evidence of people and their environment for the purposes of study, education and enjoyment.*

### Why is this section important?

How does your institution continue to learn? This section of the Reapplication ensures that your institution actively acquires, shares, and disseminates knowledge.

### Useful Definitions:

**Research:** A structured investigation that results in the discovery and collation of facts relating to a particular subject. It involves four basic stages: formulating problems, gathering and criticizing evidence, making observations, and developing conclusions based on those observations. Museums customarily undertake three types of research: discipline-based research, collections-based research, and research relating to museum functions and activities.

### Where can I find more information?

Please refer to Section 5.3 – Research Projects (pages 239 – 250) of the *Handbook*.

### What Evidence do I need to supply?

Please answer the following questions using **one** example of research conducted by your institution in the past **two** years. Examples may include research that contributes to your institution's programming, interpretation, or exhibits. Please note that research about collections management and research done on behalf of a visitor are not admissible examples.

A. Please briefly tell us about your research project. (Limit 500 characters)

B. Why did your institution undertake this research project? (Limit 1,000 characters)

# 7

## Recognized Museum Program REAPPLICATION WORKBOOK RESEARCH



C. Please list **three** sources that your institution consulted during the research process. (Limit 1,000 characters)

D. What conclusions emerged from your research project? (Limit 1,000 characters)

E. How did this research support your institution's Mission Statement? (Limit 1,000 characters)

F. When did this research take place? Please indicate the dates, including the year. (Limit 250 characters)



### What Standards does the Evidence demonstrate?

**Standard 5.3.2** Research projects are supported by a planning process that includes research questions and measurable goals.

**Standard 5.3.3** The museum recognizes research as one of its core functions and integrates it into all areas of museum practice.

### What are the Minimum Requirements?

The research projects must:

- consult three sources
- have a clear outcome and support the Mission Statement
- be done for the benefit of the museum
- not be collections management research
- have taken place within the past two years

### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

#### *Did you know?*

*You can discuss the same project in the research, interpretation, and exhibit sections of the Reapplication. Show off your institution's multifaceted work!*



## SECTION 7.2 Three Catalogue Records\*

\*If your institution indicated in the Institutional Profile it changed collections management systems in the past five years, the following section must also be submitted:

### How does this section relate to the Definition of a Museum?

*Museums research the material evidence of people and their environment for the purpose of study, education and enjoyment.*

### Why is this section important?

How does your institution document its collections and continue to learn? This section of the Reapplication ensures that your institution knows as much as possible about its collections.

### Useful Definitions:

**Cataloguing:** The process of recording essential information about an object and its particular identifying characteristics, so that it can be categorized within a designated classification system and interpreted in its appropriate context. The purpose of cataloguing is to record essential information about an object. This in turn makes it possible to link similar or related objects, and enhances the museum's ability to provide effective information retrieval.

**Record:** A document or other permanent format used to provide evidence or an account of facts; a form on which information is recorded in an organized manner.

### Where can I find more information?

Please refer to Section 3.6 – Cataloguing (pages 181 – 183) of the *Handbook*.

### What Evidence do I need to supply?

You will be asked to upload **three** examples of completed catalogue records from your institution.

- Catalogue Record Example One  
Please label the file using the format *InstitutionName\_Section7.2\_Ex1\_YEAR*.
- Catalogue Record Example Two  
Please label the file using the format *InstitutionName\_Section7.2\_Ex2\_YEAR*.
- Catalogue Record Example Three  
Please label the file using the format *InstitutionName\_Section7.2\_Ex3\_YEAR*.

### What Standards does the Evidence demonstrate?

- Standard 3.6.1** The museum acknowledges the importance of maintaining formal records pertaining to its collections.
- Standard 3.6.3** Information about objects in the collection is readily accessible and retrievable.
- Standard 3.6.4** Catalogue records are treated as historical records pertaining to the collections.

# 7

## Recognized Museum Program REAPPLICATION WORKBOOK RESEARCH



### What are the Minimum Requirements?

The catalogue records must:

- be three examples of the same type of catalogue record (e.g., three objects, three works of art)
- be completed consistently
- show unique accession numbers that align with the example you provided in the Institutional Profile
- include registration data
  - Accession number
  - Date received
  - Date accessioned
  - Mode of acquisition
- include the object's name
- include a description of the object including its condition, materials, dimensions, etc.
- include the object's classification / nomenclature
- include the name of donor / source
- include the address of the donor / source
- include information about where the object is stored or located

### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

**Remember...**

*All three catalogue records should be consistently filled out to show uniformity and standardization in your institution's cataloguing system.*

## SECTION 8.1 Example of Interpretation

### How does this section relate to the Definition of a Museum?

*Museums communicate the material evidence of people and their environment for the purpose of study, education, and enjoyment.*

### Why is this section important?

How does your institution share information with visitors? This section of the Reapplication ensures that your institution presents its collections in meaningful ways and strives to teach or reveal new insights about a subject, place, person, or object to targeted audiences. Your institution might use staff members as interpreters, for example, or provide brochures, digital materials, or other aids to help visitors make sense of what is on display.

### Useful Definitions:

**Interpretation:** The educational act, activity, or process of explaining, revealing, clarifying, teaching, or presenting an understanding about a subject, place, person, collection, or object in a personal, meaningful manner.

**Program:** An event or activity based on the museum's collections or exhibits, designed to provide opportunities for further learning and enjoyment.

### Where can I find more information?

Please refer to Unit 6 - Programming (pages 261 - 326) of the *Handbook*.

### What Evidence do I need to supply?

Please answer the following questions using an example of **one** interpretive program that your institution currently presents, or that your institution presented during the past **two** years.

- A. Please describe the program and provide its title. (Limit 500 characters)

- B. How does the program support your institution's Mission Statement? (Limit 1,000 characters)

# 8

## Recognized Museum Program REAPPLICATION WORKBOOK COMMUNICATE



C. Who is this program's target audience? (Limit 1,000 characters)

D. How does your program's target audience benefit from this interpretation? (Limit 1,500 characters)

E. How did you promote this program to the target audience? Please provide **two** examples. (Limit 1,000 characters)

F. When did the program take place? Please indicate the dates, including the year. (Limit 250 characters)

G. Please upload a copy of a document that shows an example of this interpretation. Possible documents may include a tour or program outline, interpreter instructions, self-directed tour materials, a brochure, a link to online materials, or a program participant handout.

Please label the file using the format *InstitutionName\_Section8.1\_YEAR*.

# 8

## Recognized Museum Program REAPPLICATION WORKBOOK COMMUNICATE



### What Standards does the Evidence demonstrate?

**Standard 6.2.1** The museum takes steps to identify, engage, and understand its direct and potential audiences.

**Standard 6.4.1** Program planning is linked to the museum's mission statements, goals, and objectives.

**Standard 6.5.1** The museum and its workers share a commitment to lifelong learning.

### What are the Minimum Requirements?

The example of interpretation must:

- support your institution's Mission Statement
- be developed with a specific audience in mind
- meet the needs of the target audience
- include an attachment that illustrates the interpretative method identified
- be an example from the past two years

### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

**Helpful Hint:**

*A good example will demonstrate that the program was developed with a specific audience in mind and show how the interpretation was tailored to reach that audience.*

## SECTION 9.1 Example of Exhibits

### How does this relate to the Definition of a Museum?

*Museums exhibit the material evidence of people and their environment for the purpose of study, education, and enjoyment.*

### Why is this section important?

How does your institution choose to display collections and information? This section of the Reapplication ensures that your institution develops unique ways of helping visitors experience and learn about your collections.

### Useful Definitions:

**Exhibit:** “The localized grouping of objects and interpretive materials that form a cohesive unit within a gallery” and that relate a message.

**Exhibition:** Exhibitions use some combination of objects, text, graphics, props, furniture, or architectural elements to create a physical space dedicated to the exploration of specific themes and messages. An exhibition is a comprehensive grouping of all elements (including exhibits and displays) that form a complete public presentation of collections and information for public use.

### Where can I find more information?

Please refer to Unit 7 – Exhibits (pages 327 – 376) of the *Handbook*.

### What Evidence do I need to supply?

Please answer the following questions using **one** example of exhibits developed by your institution that are either currently on display or were on display during the past **two** years.

- A. What is the title of the exhibit? (Limit 500 characters)

- B. Please briefly explain the exhibit’s storyline or theme. What is the idea behind it? (Limit 1,000 characters)

# 9

## Recognized Museum Program REAPPLICATION WORKBOOK EXHIBIT



C. How does the exhibit support your institution's Mission Statement? (Limit 1,000 characters)

D. Please describe a type of interpretation used in this exhibit (e.g., text panels, self-guided tours, interpreters, audio-visual components). (Limit 1,000 characters)

E. Please upload a file (e.g., photograph, text panel content, programming document) that demonstrates this type of interpretation. Please label the file using the format *InstitutionName\_Section9.1A\_EX1\_YEAR*.

F. Please describe a second type of interpretation used in the exhibit (e.g., text panels, self-guided tours, interpreters, audio-visual components). (Limit 1,000 characters)

G. Please upload a file (e.g., photograph, text panel content, programming document) that demonstrates this type of interpretation. Please label the file using the format *InstitutionName\_Section9.1A\_EX2\_YEAR*.

H. When was the exhibit on display? Please indicate the dates, including the year. (Limit 250 characters)



### What Standards does the Evidence demonstrate?

**Standard 7.1.1** Through a regular exhibit program, the museum recognizes that exhibits form a major part of its public image and create value and significance for its collections.

**Standard 7.1.2** Exhibits support the museum's mission statement.

**Standard 7.3.2** Exhibits support the museum's commitment to lifelong learning and quality visitor experiences.

### What are the Minimum Requirements?

The exhibit example must:

- include attachments that illustrate the interpretive methods described
- demonstrate that the exhibit goes beyond a simple display of an object with a text panel
- be developed by your institution
- be from the past two years

### How will we get this done?

Staff person to complete task: \_\_\_\_\_

Due date: \_\_\_\_\_

Notes:

*Helpful Hint:*

*Make sure the exhibits you use for this section were developed by or on behalf of your institution, as opposed to a travelling or temporary exhibit developed by another institution.*