

# Almond Valley Heritage Trust

## Acquisition and Disposal Policy 2012 - 2017

Almond Valley Heritage Centre, and the Museum of the Scottish Shale Oil Industry:

Museums operated by Almond Valley Heritage Trust

Adopted by the Board; January 2012

Due for review; January 2017

### 1. Museum's statement of purpose

Almond Valley's mission is to preserve and interpret the history and environment of West Lothian and make this heritage accessible, engaging and enjoyed by all. Almond Valley also fulfils the role and responsibilities of a national museum of Scotland's Shale Oil Industry.

### 2. Existing collections

Our collection of the Scottish shale oil industry is recognised as being of national significance to Scotland. It illustrates the technological, commercial and social history, the environmental impact, and most other areas of influence of the industry from the mid-19<sup>th</sup> century through to the present day. It is concerned with the Scottish shale-fields centred on West Lothian, the spread of coal-oil interests throughout the central belt of Scotland, and in the national and international interests and influence of the Scottish industry. It includes objects (ranging in scale from small exhibits to large industrial machinery), archives, plans and various other media.

Associated, but distinct from the shale oil industry collection, we hold objects and archives that illustrate the wider distribution and use of oils in Scotland: (particularly the activities of Scottish Oils Ltd), and the domestic use of lamp oils and paraffin.

The collection also includes small objects, images, paper ephemera and other material illustrating the social, agricultural and commercial history of the central and eastern areas of West Lothian, particularly those communities associated with the shale oil industry

We hold, on behalf of BP Oil International, most company records that survive from the Scottish shale oil industry. This private business archive is considered and managed as a separate holding to our own collection and archive.

A collection of large machinery from Bathgate spade forge and associated archive

material is displayed, and we have maintained an interest in collecting from mining and heavy industries in all areas of West Lothian. We also hold a collection of vehicles and farm equipment that illustrate local trade and commerce, and enable the practical demonstration of agricultural processes.

Our museum had special links with Livingston Development Corporation and we have assembled a collection that illustrates many aspects of the development of the new town. We have also maintained a special interest in collecting objects that illustrate the River Almond, the local use of water power, local farming practice, local geology, and other objects and records that support and extend the interpretation of the Almond Valley site.

We have also collected a range of objects, not necessarily with a clear West Lothian provenance, to support specific exhibitions, displays and educational activities.

### 3.) Future Acquisition Policy.

We will continue to actively collect all types of material related to the Scottish shale oil industry. Many aspects of the industry remain poorly represented, and it seems unlikely that situations will arise in which we might need to consider refusal of a new acquisition because similar material was already well represented in the collection.

It now seems unlikely that significant assemblages of material remain to be collected from the active oil industry in Scotland. Most continued growth of the collection is likely to be through the donation and purchase of smaller objects and archives that survive in private ownership. If it became available, material illustrating business competitors, the market place in which shale companies operated, or the wider activities of Scottish Oils Ltd might be collected. Only items of exceptional merit will be added to further illustrate the domestic use of oils.

We will continue to collect local and social history material, (particularly associated with the shale and cannel-coal districts of West Lothian) that illustrate local life and industry, but there will be presumption against accessioning general household effects and other items without a clear provenance. Such materials might be accepted as handling objects or set dressing without accession into the collection. We will continue to collect material illustrating the development of Livingston.

We will maintain an interest in heavy industry and mining throughout West Lothian, however it now appears unlikely that further large and significant potential acquisitions may arise. It is unlikely that we will collect further vehicles and large items of agricultural equipment and may review the future status of some farming equipment that does not have a local provenance.

We do not plan to assemble any significant collections relating to archaeology, natural history, geology, ethnographic material, works of art, or any other specialist areas of collecting. Individual objects might occasionally be acquired however where they relate to the wider interpretative or educational themes considered within the museum.

#### 4. Limitations on collecting

The museum recognises its responsibility, in acquiring additions to its collections, to ensure that care of collections, documentation arrangements and use of collections will meet the requirements of the Accreditation Standard. It will take into account limitations on collecting imposed by such factors as staffing, storage and care of collection arrangements.

#### 5. Collecting policies of other museums

The museum will take account of the collecting policies of other museums and other organisations collecting in the same or related areas or subject fields. It will consult with these organisations where conflicts of interest may arise or to define areas of specialisms, in order to avoid unnecessary duplication and waste of resources.

Specific reference is made to the following museum(s):

- ◆ West Lothian Council Museums Service
- ◆ Linlithgow Heritage Trust
- ◆ The Bennie Museum

#### 6. Policy review procedure

The Acquisition and Disposal Policy will be published and reviewed from time to time, at least once every five years. The date when the policy is next due for review is noted above.

Museum Galleries Scotland will be notified of any changes to the Acquisition and Disposal Policy, and the implications of any such changes for the future of existing collections.

#### 7.) Acquisitions not covered by the policy

Acquisitions outside the current stated policy will only be made in very exceptional circumstances, and then only after proper consideration by the governing body of the museum itself, having regard to the interests of other museums.

## 8.) Acquisition procedures

a. The museum will exercise due diligence and make every effort not to acquire, whether by purchase, gift, bequest or exchange, any object or specimen unless the governing body or responsible officer is satisfied that the museum can acquire a valid title to the item in question.

b. In particular, the museum will not acquire any object or specimen unless it is satisfied that the object or specimen has not been acquired in, or exported from, its country of origin (or any intermediate country in which it may have been legally owned) in violation of that country's laws. (For the purposes of this paragraph 'country of origin' includes the United Kingdom).

c. In accordance with the provisions of the UNESCO 1970 Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, which the UK ratified with effect from November 1 2002, the museum will reject any items that have been illicitly traded. The governing body will be guided by the national guidance on the responsible acquisition of cultural property issued by the Department for Culture, Media and Sport in 2005.

d. So far as biological and geological material is concerned, the museum will not acquire by any direct or indirect means any specimen that has been collected, sold or otherwise transferred in contravention of any national or international wildlife protection or natural history conservation law or treaty of the United Kingdom or any other country, except with the express consent of an appropriate outside authority.

e. In Scotland, under the laws of *bona vacantia* including Treasure Trove, the Crown has title to all ownerless objects including antiquities. Scottish archaeological material cannot therefore be legally acquired by means other than by allocation to Almond Valley by the Crown. Where the Crown chooses to forego its title to a portable antiquity, a Curator or other responsible person acting on behalf of the Almond Valley Heritage Trust, can establish that valid title to the item in question has been acquired by ensuring that a certificate of 'No Claim' has been issued on behalf of the Crown.

f. Any exceptions to the above clauses 9a, 9b, 9c, or 9e will only be because the museum is either:

- ◆ acting as an externally approved repository of last resort for material of local (UK) origin; or
- ◆ acquiring an item of minor importance that lacks secure ownership history but in the best judgement of experts in the field concerned has not been illicitly traded; or
- ◆ acting with the permission of authorities with the requisite jurisdiction in the country of origin; or
- ◆ in possession of reliable documentary evidence that the item was exported from its

country of origin before 1970.

g. The museum does not hold or intend to acquire any human remains.

## 9. Spoliation

The museum will use the statement of principles 'Spoliation of Works of Art during the Nazi, Holocaust and World War II period', issued for non-national museums in 1999 by the Museums and Galleries Commission.

## 10. Management of archives

As the museum holds / intends to acquire archives, including photographs and printed ephemera, its governing body will be guided by the Code of Practice on Archives for Museums and Galleries in the United Kingdom (3rd ed., 2002).

## 11. Disposal procedures

### Disposal preliminaries

- a. The governing body will ensure that the disposal process is carried out openly and with transparency.
- b. By definition, the museum has a long-term purpose and holds collections in trust for society in relation to its stated objectives. The governing body therefore accepts the principle that sound curatorial reasons for disposal must be established before consideration is given to the disposal of any items in the museum's collection.
- c. The museum will confirm that it is legally free to dispose of an item and agreements on disposal made with donors will be taken into account.
- d. When disposal of a museum object is being considered, the museum will establish if it was acquired with the aid of an external funding organisation. In such cases, any conditions attached to the original grant will be followed. This may include repayment of the original grant and a proportion of the proceeds if the item is disposed of by sale.

### Motivation for disposal and method of disposal

- e. When disposal is motivated by curatorial reasons the procedures outlined in paragraphs 12g-12s will be followed and the method of disposal may be by gift or sale.
- f. The museum will not undertake disposal motivated principally by financial reasons

## The disposal decision-making process

g. Whether the disposal is motivated either by curatorial or financial reasons, the decision to dispose of material from the collections will be taken by the governing body only after full consideration of the reasons for disposal. Other factors including the public benefit, the implications for the museum's collections and collections held by museums and other organisations collecting the same material or in related fields will be considered. External expert advice will be obtained and the views of stakeholders such as donors, researchers, local and source communities and others served by the museum will also be sought.

## Responsibility for disposal decision-making

h. A decision to dispose of a specimen or object, whether by gift, exchange, sale or destruction (in the case of an item too badly damaged or deteriorated to be of any use for the purposes of the collections or for reasons of health and safety), will be the responsibility of the governing body of the museum acting on the advice of professional curatorial staff, if any, and not of the curator of the collection acting alone.

## Use of proceeds of sale.

i. Any monies received by the museum governing body from the disposal of items will be applied for the benefit of the collections. This normally means the purchase of further acquisitions. In exceptional cases, improvements relating to the care of collections in order to meet or exceed Accreditation requirements relating to the risk of damage to and deterioration of the collections may be justifiable. Any monies received in compensation for the damage, loss or destruction of items will be applied in the same way. Advice on those cases where the monies are intended to be used for the care of collections will be sought from MLA.

j. The proceeds of a sale will be ring-fenced so it can be demonstrated that they are spent in a manner compatible with the requirements of the Accreditation standard.

## Disposal by gift or sale

k. Once a decision to dispose of material in the collection has been taken, priority will be given to retaining it within the public domain, unless it is to be destroyed. It will therefore be offered in the first instance, by gift or sale, directly to other Accredited Museums likely to be interested in its acquisition.

l. If the material is not acquired by any Accredited Museums to which it was offered directly as a gift or for sale, then the museum community at large will be advised of the intention to dispose of the material, normally through an announcement in the Museums Association's Museums Journal, and in other specialist journals where appropriate.

m. The announcement relating to gift or sale will indicate the number and nature of specimens or objects involved, and the basis on which the material will be transferred to another institution. Preference will be given to expressions of interest from other Accredited Museums. A period of at least two months will be allowed for an interest in acquiring the material to be expressed. At the end of this period, if no expressions of interest have been received, the museum may consider disposing of the material to other interested individuals and organisations giving priority to organisations in the public domain.

#### Disposal by exchange

n. The museum will not dispose of items by exchange.

#### Documenting disposal

o. Full records will be kept of all decisions on disposals and the items involved and proper arrangements made for the preservation and/or transfer, as appropriate, of the documentation relating to the items concerned, including photographic records where practicable in accordance with SPECTRUM Procedure on de-accession and disposal.

### Appendix One: Some Practical Collection management issues

A clear distinction is made between objects that form the Scottish Shale Oil Industry collection and the museum's broader local history collection. To be designated as part of the SSOI collection an object must be directly related to:

- ◆ a location or
- ◆ a process or activity or
- ◆ an individual, organisation, or company

associated with the shale oil industry, or relate to communities that have strong associations with the shale oil industry

A clear distinction is made between objects included in the SSOI collection and a wealth of other library and copy material held as a reference and research resource. Plans, drawings photographs and other documentary material will normally be accepted into the museum collection only if they are

- ◆ primary records (eg a typewritten letter, a hand-coloured drawing, a photographic negative, a printed publication) or

- ◆ copies of primary records made subsequently for business purposes associated with the shale industry and its legacy.

There is a presumption against the immediate accessioning of contemporary records of the surviving heritage of the shale industry (eg oral history recordings, site photographs), however after passage of time (perhaps ten years), when the merit of these becomes more apparent, consideration might be given to accessioning appropriate primary records (eg cassette recordings, colour slides. In the future years consideration might be given to the accessioning objects that exist purely as digital files (eg digital photographs, audio and video.)