



*Education and Advisory Services*

*Site Visit Report*

*Summerland Museum and Archives Society*

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**Prepared for**

Amy McCroy

Curator

Summerland Museum and Archives Society

9521 Wharton Street

Summerland, BC

V0H 1Z0

Email: [info@summerlandmuseum.org](mailto:info@summerlandmuseum.org)

**Prepared by**

Lisa Glandt

Education and Advisory Services (EAS) Coordinator

Archives Association of British Columbia

Tel: 778-680-2273

Email: [aabc.advisor@aabc.ca](mailto:aabc.advisor@aabc.ca)

## 1.0 Introduction

The Summerland Museum and Archives Society has been in existence since the late 1960s, driven by the historical interests of community members. They have been housed in a couple of different buildings and have been in their present facility on Wharton Avenue since 1984 when it opened as a purpose-built museum space funded by a Federal Government grant. A recent endowment and a successful Cultural Spaces Grant allowed for some much-needed renovations to the space (completed April-July 2016) that included new flooring throughout the museum exhibit space and refreshed painting. Custom closed shelving units were also purchased to store paintings and some pieces from the artefact collection. The renovation did not extend through to the “back room” where archival materials and museum artefacts are stored along with the staff desks, processing work space, and researcher reference space.

The Summerland Museum and Archives (SMA) works in active partnership with its community to collect, preserve and display artefacts and archival materials acquired from local residents, organizations and businesses. Over the years, work within the SMA has been completed by both paid staff, volunteers and interns, but typically there has been a limited budget for hiring, making it difficult to hire and retain professionally trained archival or museum staff. The Society’s Board of Directors has an active on role within the SMA.

The Summerland Museum and Archives has an existing mission statement and mandate and this is made publicly available on their website at <http://www.summerlandmuseum.org/about-us> and states:

### ***Our Mission Statement***

*The museum shall preserve and promote Summerland’s history. This is accomplished through the collection, documentation, preservation, interpretation, research, display, collaboration and service to the public.*

*The purpose of the Archives, as a part of the Summerland Museum, is to identify, acquire and preserve material of archival and/or informational value to the District of Summerland, and the community as a whole, and to make such records available to the public.*

*The Summerland Museum Board will make its collections available to the public of all ages, interests and abilities, through the use of exhibits, educational programs, public programs, publications, special events, outreach exhibits, lectures and speakers (as long as such avenues do not endanger the objects in the collection).*

*Summerland's Museum is committed to creating a strong and proud community by celebrating our shared heritage and helping to satisfy the intellectual needs of the community.*

### ***Mandate***

*The Museum's mandate is to preserve and promote Summerland's history through collections, displays, educational activities, and outreach programs.*

*“We are dedicated to making our museum a place of activity, education and enjoyment.”*

The SMA also identifies and lists *Core Values* that include “*Respect and Inclusiveness; Leadership and Excellence; Enthusiasm; Scholarship and Leadership; Commitment and Responsibility; Accessibility and Responsiveness; Knowledge and Service*”.

This report will focus on:

1. Policies
2. Staffing needs and education
3. Research access to and security of archival collections

## **2.0 Discussion and Recommendations**

### **Policies**

Policies provide a plan of action for employees and others in making decisions. A typical archives should have established policies in writing that includes the institution’s mandate, acquisition policy and methods; appraisal guidelines; and disposal policy. An archives should also have an access policy that covers hours of operation, registration and conditions of research.

(I) The Summerland Museum and Archives has a clearly written mission and mandate that provides a foundation for the materials they will acquire into their holdings. It is important that the Board and staff alike respect and follow the guidelines of the policy and mandate so that all decisions are based on the same rational and can be consistent, ethical, and unbiased.

The Curator is currently responsible for the management, exhibit, and access to the museum and archival collections. Unauthorized acceptance of archival materials that do not fit within the SMA’s mandate can have a major impact on staff workload and efficiency, create storage problems, and use up supplies and other costly resources that should be allocated to more relevant donations.

All offers of archival materials (and museum artefacts) should go through the Curator, in consultation with the Board of Directors (as required) for donations that require additional background research about their local relevance and historical significance. Working in partnership together, staff and the Board should support each other for the greater good of the collection and its preservation and access.

**Recommendation 1:** The SMA Mission Statement, Mandate, and Acquisition Policy should be reviewed with the Board of Directors on an annual basis and updated as/if required. A discussion should be had about including geographical collecting boundaries or a timeframe for archival (or museum) items the SMA is seeing to acquire.

**Recommendation 2:** The Okanagan Valley has many collecting archives, museums, and historical societies. The SMA should endeavour to only collect materials that specifically relate to their mandate and to work in partnership with their heritage neighbours to find the most suitable repository (home) for the materials if something is offered to the SMA but is outside of their collecting mandate.

(II) Unauthorized donations (i.e. dropped off without the knowledge or consent of the Curator) should not be permitted. The donation of materials to the SMA MUST include the signed, legal transfer of the materials through a Deed of Gift form. Without proper paperwork in place donor

information is incomplete, the provenance of the records cannot be recorded, and their history is lost. A signed Deed of Gift also includes important clauses like signing over copyright to the SMA and any noted restrictions within the records as stipulated by the donor.

**Recommendation 3:** The SMA Acquisition Policy should include a statement about not accepting unauthorized donations and that donors are welcomed to make an appointment with the Curator to discuss the materials and ensure their suitability for the SMA collection. This enables the Curator to record important details about the historical significance of the records and associated materials and ensure all donor paperwork is completed in a timely manner. This information should also be posted on the SMA's website.

**Recommendation 4:** SMA Volunteers and Board Members should be informed of this policy and direct all public inquiries about donations to the Curator. This way the donation can be considered in relevance to the SMA's mandate and acquisition policy and all required paperwork filled out at the time of donation.

(III) Understanding appraisal rationale and applying it to potential donations and to existing items in the collection takes practice and familiarity of your holdings. Having established policies and a mandate will assist with these first stages of appraisal. Documenting appraisal steps or guidelines will provide a consistent framework when looking at the value, condition, and historical relevance of the records.

Are the photographs or records duplicate copies? If they are, then there is no reason to keep a duplicate copy. If not, then are these records being kept by another heritage organization/society? If yes – are the records duplicates and do you really need to keep them? If no – then the SMA should endeavour to collect and keep the records to the best of their ability as long as they meet their mandate.

**Recommendation 5:** Develop appraisal guidelines to be used when assessing potential donations or reviewing records in their holdings. This will ensure that decisions made by current staff, project-specific volunteers or contract staff is based on the same rationale. Decisions made today are then documented for the benefit of future staff and researchers.

The Archivist's Toolkit available on the AABC website includes a section on appraisal:

- <http://aabc.ca/resources/archivists-toolkit/acquisition/>

(IV) Deaccessioning is a professionally recognized part of good stewardship and management of both archival and museum collections. Deaccessioning can come about in many ways – as a result of a functional audit of the archival/museum holdings or a change in mandate or acquisition policy. Either way, reappraisal of the holdings is completed in a careful, moderated and transparent manner and supported by an approved Deaccessioning Policy. Prudent deaccessioning can lead to a stronger core collection and a better use of staff time and resources including storage space, supplies, and the time it takes to find materials for research or exhibit use.

The recent SMA renovation project necessitated that archival materials and museum artefacts were moved temporarily offsite while the work was completed. This exercise revealed a number of items whose relevance to the collection were questioned as they did not seem to meet the SMA mandate (or were multiple duplicates of processed items/artefacts) but have been part of the

collection for a long time. Onsite storage and work space is a pressing concern for staff and the storage space taken up by these questionable items highlighted the need for a deaccessioning project to be investigated and undertaken in the near future. A large portion of archival materials and artefacts are stored offsite and perhaps could be returned to the museum and archives once deaccessioned items were removed from the collection and building all-together.

That being said, deaccessioning does not happen overnight. SMA staff should work with the Board of Directors to develop a deaccessioning policy and approve the steps for reappraisal and deaccessioning through the steps of returning to donor, transfer to another archives/museum, sale or destruction.

**Recommendation 6:** Draft a deaccessioning policy and submit to Board of Directors for approval and support. Discussions with Board staff will include topics such as definitions related to deaccessioning, ethical due diligence of the reappraisal/deaccessioning process, deaccessioning steps, and roles and responsibilities of staff and Board members.

Deaccessioning resources that you can consult include:

- Appendix 1: sample Deaccessioning Policy from the Oliver and District Heritage Society
- “An Introduction to the Deaccession and Disposal of Collections” prepared by Museums Ontario  
<https://members.museumsonario.ca/sites/default/files/members/AnIntroductionToTheDeaccessionAndDisposalOfCollections29May2013.pdf>
- “Guidelines for Reappraisal and Deaccessioning” prepared by Society of American Archivists  
<http://www2.archivists.org/sites/all/files/GuidelinesForReappraisalAndDeaccessioningDRAFT.pdf>

### **Staffing needs and education**

(V) The current staff complement at the Summerland Museum and Archives is 1 part-time Curator with assistance from volunteers on various projects. Until recently there was also 1 part-time Archivist.

The Curator has been tasked with the management of both the archival and museum collections. She has been with the organization for 8 months and has made some progress on the backlog of records and cataloguing artefacts during her time at the SMA. Customer service is a huge part of her position as she must stop her exhibit/curatorial work to assist researchers or museum visitors who come in during open hours. During the recent renovation the Curator was allowed to work full-time hours and used this extra time to work on the backlog of records and improve their onsite physical storage. A great deal of progress was made in a short amount of time which the Curator was very proud of.

The current Curator demonstrated great passion and concern about the collection and a desire to have assistance by hiring a part-time Archives Intern. This position, funded at approx. 20 hours/week would provide for dedicated work on the archival records by a trained Archivist.

***Recommendation 7:***

Funding be made available to increase the Curator's hours to full time. As demonstrated, increased hours would mean time to improve administrative processes and policies, increased time to process the collection, and work on exhibits and outreach.

***Recommendation 8:*** Funding be made available to support the Archives Intern position. This role would ease the work burden of the Curator and allow for focused work on the archives backlog and making it more accessible to researchers.

(VI) The SMA has been fortunate to rely on the generosity of volunteers to assist with various projects over the years. Basic archival processing work (i.e. removing staples, rehousing documents into acid free folders, identifying photographs, preparing archival inventories box lists) are appropriate tasks for volunteers. As standards have been developed at the national level for Canadian archives (and corresponding museum standards), there are now requirements that dictate that staff have a specialized skill set gained through professional and academic training. This ensures that the appraisal, arrangement and descriptive work completed by archivists and museum professionals across Canada is consistent, protects the integrity of the records, and provides objectivity in their work when acquiring and accepting donations.

In order to maintain and administer these professional standards, the Curator should provide guidance to the volunteers on various projects. In order to protect archival records (textual, photographic, audio-visual or oral history records), they should remain onsite at all times and volunteers should not take archival materials from the SMA and work on projects at home as they could be irreparably damaged, lost or accidentally destroyed.

***Recommendation 9:*** The Curator should match volunteers with suitable projects and provide written instructions on procedures to complete the work. Archival records should not be taken offsite by volunteers, all work should happen at the SMA. A volunteer project work schedule should be discussed and agreed upon by the Curator and volunteers to make the best use of the limited work space at the SMA.

**Research access to and security of archival collections**

(VII) Access to the archival records is provided through consultation with the Curator. There is a computer station available for researchers to use in a corner of the exhibit gallery and an extensive set of research materials and inventories at their disposal. Members of the SMA are permitted to do their own research. In order to physically review archival records, researchers are escorted to the "back room" by the Curator where there is a desk they may use. Note that the "back room" is an open shared space that contains archival and artefact storage shelves, staff desks, archives/museum processing and exhibit development space, and researcher space.

The Curator has identified some ways to reconfigure the current layout of equipment and tables to make a more suitable space for researchers. It would allow for researchers to stay at the front/entry area of the room and allow for easier supervision by the Curator working at her desk when researchers are handling archival records or photographs.

***Recommendation 10:*** Reconfigure and reorganize the tables at the front of the room into usable researcher space. This will provide both a physical designation and visually separate space for researchers to work in and offer greater security for the collection.

(VIII) Since it is a multi-use space that holds unsecured archival materials and artefacts, all non-staff visitors to the “back room” – ie. volunteers, researchers, Board Members, students, should fill out a Visitor Sign-In/Out Register. This will help track the people coming in and out of the space in the event that something goes missing from the collection or is damaged. Recording the day/time of volunteers completing their work can also be used to document their valuable time contributions and be recorded in annual reports or for grant/funding applications.

***Recommendation 11:*** All visitors (volunteers, researchers, Board Members, students) to the back storage/work room should sign a “Visitor’s Register”.

(VIII) As an outcome of the renovation work completed earlier in the year, archival materials and artefacts were moved around to different storage locations. The shelving units currently used for archival and artefact storage are not numbered and retrieval of the records/artefacts is either by memory or browsing. The shelves should be numbered and this information entered into the database with the corresponding archival boxes or artefacts.

Boxes are labelled in different ways, some have old artefact subject category numbers, others have photographs on the interior contents, while others have box inventories written on them. A consistent box numbering system should be adopted so that the boxes can be tracked in the database.

***Recommendation 12:*** Label the storage shelves (Row #, Bay #, Shelf #) and record this information in the database with the items on each shelf.

***Recommendation 13:*** Assign box numbers to all unlabeled storage boxes. A separate numbering system could be used to distinguish the archival boxes from museum boxes if deemed necessary i.e. Box A01 = Archives Box 01 ; Box M01 = Museum Box 01

(X) The SMA has a rich oral history collection. Volunteers have been working on transcriptions and as noted previously, this work should take place at the SMA, not at their homes in order to protect the original recording. Due to the fragile nature of some older audio-cassette tapes they should be carefully handled. Budget permitting, the audio-cassette tape recording should be copied to CD. This Master CD can then be used to create a second researcher copy. Transcriptions should be completed using the CD copy so that continual rewinding/fast-forwarding doesn’t damage the original audio-cassette tape.

***Recommendation 14:*** The original cassette tape should be migrated to CD as research demand requires. Copies should be made by a reputable company with experience working with original archival/museum materials.

The Curator noted that permission forms were not signed for some of the oral histories in the collection. She is concerned about copyright and privacy implications and how they should manage these records going forward. A review of current legislation states:

*Legislation stipulates that privacy rights expire 20 years after the death of the individual and that records can be opened 100 years after the creation of the record.*

*Economic copyright lasts for 50 years from time sound recording or performance is first fixed.*

**Recommendation 15:** The SMA should exercise their due diligence and make every effort to track down ownership and obtain copyright related to the oral history interviews without donor or release forms. If the interviewee is deceased, you should contact family members. If you cannot locate an heir, the SMA must determine the risk assessment to make this material accessible and be prepared to remove it if someone objects.

Some sample Oral History Release Forms can be found online at:

- <https://www.ischool.utexas.edu/~stories/training/Release.doc>
- <http://www.folklife.si.edu/resources/pdf/interviewreleaseform.pdf>
- <http://ohda.matrix.msu.edu/2012/06/a-creative-commons-solution/>

This website provides a condensed list of resources that may be of further help with managing your Oral History program:

- [http://www.archivescanada.ca/car/car\\_e.asp?l=e&a=various](http://www.archivescanada.ca/car/car_e.asp?l=e&a=various)

### **3.0 Conclusion**

Staff and volunteers at the Summerland Museum and Archives are to be commended for their enthusiasm, hard work and commitment to preserving the history of Summerland. This devotion was recognized in the Curator's request for a site visit and her participation in the recent AABC 1-day workshop on "Archival Management" held in Kelowna on September 13, 2016.

The recommendations in this report may seem daunting for an organization currently managed by 1 part-time staff member. One way to look at the report is to approach it sequentially or in 'pieces', such as choosing to focus on a specific area of archival policy development and set a calendar deadline to have a draft ready for submission to the Board of Directors for discussion. And then working with the Board to answer questions or concerns and move forward to have the policy approved so that it can be adopted into everyday work. Additionally, the recommendations in this report can form the basis for 'best practices' to be adopted into administrative guidelines for staff and volunteers.

The Summerland Museum and Archives has a number of foundational policies in place and this provides direction for staff, volunteers and Board members. Recognition and support of these policies and procedures by all stakeholders associated with the Summerland Museum and Archives Society will ensure that the mission, mandate and core values are achieved and the records and artefacts in the collection are preserved for future generations.

Please do not hesitate to contact the Education and Advisory Services Coordinator if you have any further questions.

## Appendix 1:

# Oliver and District Heritage Society

Box 847, Oliver, BC V0H 1T0 • info@oliverheritage.ca • www.oliverheritage.ca

## Deaccession Policy

Deaccessioning, the permanent removal of an object from the collection, must be undertaken with caution, deliberation, discretion and with the best interest of the collection in mind. The primary purpose of deaccessioning is advancement of the quality and preservation of the collection. Deaccessioning procedures must be followed to maintain the integrity of the public trust, and to ensure that the process is completed fairly and legally.

All objects are subject to the policy of deaccession and, except as specifically stated, no objects will be sold, traded, or otherwise removed from the care and protection of the Society.

The only objects considered for deaccession are those to which the Society has clear ownership or which fall under the umbrella of [Abandoned Objects](#).

Reasons for deaccessioning may include, but are not limited to, the following:

- The object is deteriorated beyond any useful function for exhibition, research, study, or other purpose; or
- The object bears no relationship to any other object in the collection; or
- The object is not relevant to the objectives and purposes of the ODHS.<sup>[1]</sup>; or
- The object is more relevant to another institution's collection; or
- The object is an unidentifiable piece or fragment; or
- The object is unwieldy, or of a large size, and the amount of storage space required exceeds the object's historical value or pertinence; or
- The object is a duplicate with lesser provenance or documentation; or
- The object is being repatriated (returned to the culture which produced it); or
- The object is discovered to have come from a questionable source; or
- The object is determined not to be authentic; or
- The object is subject to restrictions which limit the object's use; or
- The object requires specialized storage facilities or conservation care which the Society cannot provide; or
- The object has a serious lack of documentation (provenance); or
- The object is a threat to any of the following: the collection, visitors, staff.

## a. Deaccessioning Procedure

Disposal of artifacts will be accomplished in the following manner.

1. Items to be considered for deaccessioning are noted in PastPerfect under 'Status' as "TO BE DEACCESSIONED".
2. Staff carefully considers if the item meets one or more of the a forementioned criteria and should be deaccessioned.
3. If NOT deaccessioned, the records status is returned to its original state. If it IS to be deaccessioned, staff move to Step 4.
4. The Community Heritage Manager takes a list of proposed deaccession items to the Board, who will approve, or not approve, the deaccessioning of the items.

SPECIAL NOTE: If an item(s) is in such a state of disrepair or is threatening the condition and well-being of other objects or the health of staff/volunteers, the item(s) may be deaccessioned and immediately destroyed by decision of the Collections Manager. Two ODHS staff or volunteers should witness the destruction. If this does not apply, continue to Step 5.

5. All accession numbers are removed, wherever possible, from the deaccessioned items. These accession numbers will not be reassigned.
6. Staff will then take the following steps (in the order listed) to find a new location for the items:
  - a. Objects that are appropriate for the [Education Collection](#) will be transferred into that collection. Move to Step B for the remaining objects.
  - b. The objects will be offered to another non-profit public heritage organization that endeavors to retain its collection in perpetuity through the BCMA listserve or by contacting specific organizations. If the items are not transferred, move to Step C.
  - c. Try and sell the artifact(s) through a public auction house. If they are not accepted for auction, move to Step D.
  - d. Find an antiques dealer who will sell the object(s). If you are unsuccessful, move on to Step E.
  - e. Provide the public the opportunity to purchase the item for a period of two weeks on Society property. If the object(s) do not sell, move on to Step E.
  - f. LAST RESORT: Destruction of the item. Two ODHS staff or volunteers should witness the destruction and disposal.
7. All proper Deaccession documentation will be completed within PastPerfect with regards to the object(s) and a printed Deaccession Record will be stored in the donor file.

Any proceeds from the sale of artifacts (Steps 6. C to E) will go into a 'Collection Acquisition and Management Reserve'. These funds may only be spent on direct care of the collection. For example: improving collection storage, conserving an artifact,

purchasing an artifact for the collection. There will be a separate budget line designated for the purposes of tracking these funds.

Under no circumstances will deaccessioned objects be acquired by members of the Board, staff or their families, volunteers, agents or friends of the members of the governing body unless the items are sold at public auction. No one associated with the Society may be specifically told of the time or date of the auction.

As stated by the Canada Revenue Agency, Canadian Museums cannot return an artifact to the original donor as it is seen as conferring a personal benefit on a private individual. They may purchase it back at public auction.[2]

## b. Repatriation of Culturally Sensitive Materials

Deaccession for repatriation involves considerations unique to that issue and are addressed in the [Culturally Sensitive Materials](#) portion of this document.

## c. Return to Donor Requests

If a donor or heirs/successors request the return of an object, it can be returned only if ODHS records contain no evidence that the object is the property of the Society and if the person making the request can reasonably establish their ownership rights.

The Canada Customs and Revenue Agency states, "In most cases a registered charity cannot return a donor's gift. At law, a gift transfers ownership of the money or other gifted property from the donor to the charity. Once the transfer is made, the charity's governing documents oblige it to use the gift in carrying out its charitable purposes." [3] This is especially true for those gifts that had an income tax receipt issued.

Canada Border Services Agency,[4] the Canada Revenue Agency[5] and the B.C. Heritage Conservation Act (1996)[6] should be consulted for further information regarding requests from donors to have gifts returned.

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[1] OHDS, 'Constitution', p. 1.

[2] Anne Howard, *Standard Practises Handbook for Museums, 2<sup>nd</sup> Ed.* (Edmonton AB:

Museums Alberta, 2003), pp. 201.

[3] Charity Central, 'G4. Can our Charity return a gift to a donor?', 2012, <http://www.charitycentral.ca/node/73>, 8 December, 2015.

[4] Canadian Border Services Agency, <http://www.cbsa-asfc.gc.ca/>

[5] Canada Revenue Agency, <http://www.cra-arc.gc.ca/>

[6] Prov. of BC, Heritage Conservation Act.