



# Summerland Museum & Archives Society

## Collections Policy Manual

*Adopted by Board of Directors, Feb 27, 2008*

*Amended October 29, 2009*

*Amended April 30, 2014*

*Amended February 23, 2017*

*Amended and Adopted by Board of Directors, Feb. 8, 2018*

### **VISION STATEMENT**

***To be a place of passionate exploration of Summerland's history***

### **MISSION STATEMENT**

***The Summerland Museum and Archives (SMA) exists to collect, preserve, research, interpret, and display objects that are historically significant to our community. These objects will reflect primarily the history of the Summerland district, then the immediate surrounding area, from the period from pre-contact, including Indigenous history, to the present.***

### **THE SUMMERLAND MUSEUM & ARCHIVES SOCIETY'S CORE VALUES**

*Leadership and Excellence*

*Inclusivity and Cultural Sensitivity*

*Ethical and Credible Research*

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# A. Purpose and Scope of Collections

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## 1. Purpose of Policy

### 1.1 Introduction

The Summerland Museum and Archives Society (hereafter the Summerland Museum or SMAS) is a public institution that provides Summerland residents, visitors to the city, and interested parties with opportunities to experience and learn about the history of Summerland. SMAS cooperates on a local, provincial, and national level with other museums, galleries, organizations, agencies, societies, and cultural and educational institutions in carrying out its mandate.

### 1.2 Standard of Application

The policies described apply to all staff members, Board members, and volunteers, as well as any contractors or freelance workers. Anyone who disregards these policies does so at their own risk and assumes all liability, including the possibility for dismissal.

### 1.3 Reviews

This *Collections Policy Manual* is to be reviewed by the Board in association with staff members every five years, or at any time requested by the President of the SMAS Board.

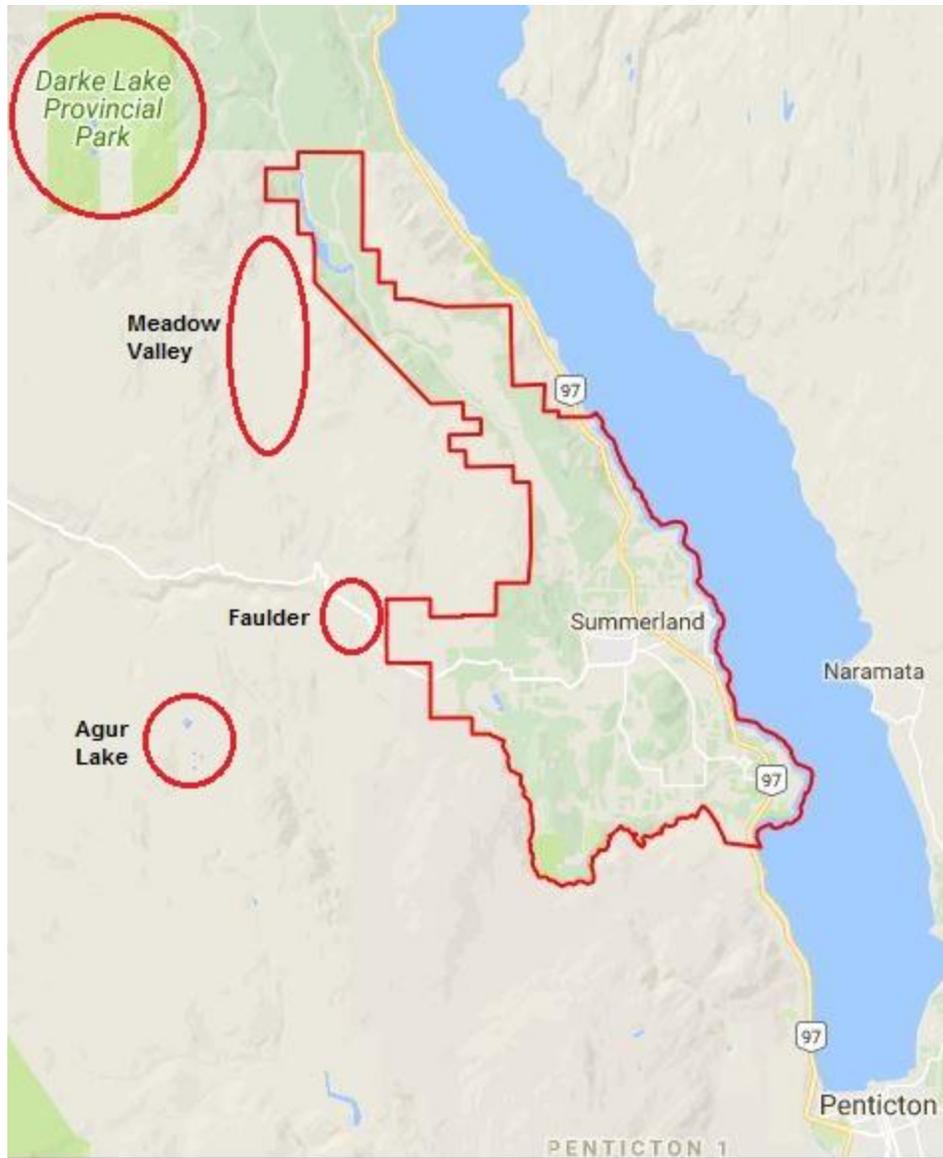
## 2. Scope of Collections

### 2.1 Historic Overview

The Summerland Museum and Archives was incorporated as the Summerland Museum and Arts Society in 1969. The name was changed to the Summerland Museum and Heritage Society in 1992 and to the Summerland Museum and Archives Society in 2017. Its collections come primarily from donations made by individuals and organizations in the Summerland area.

### 2.2 Mandate

SMAS exists with the mandate to preserve and promote Summerland's history through the collection, documentation, preservation, interpretation, research, display, collaboration, and service to the public. The geographical boundaries of the District of Summerland can be found on the District Website, with an image below (Figure 1). SMAS also acquires material pertaining to geographical areas directly adjacent to District boundaries within the Regional District of the Okanagan and Similkameen (RDOS), specifically in the areas of Faulder, Meadow Valley, Bathfield, Agur Lake, Bald Range, and Darke Lake.



**Figure 1: Summerland District Boundaries with adjacent locations marked.**

### 2.3 Scope and Limits of Collections

The collections at SMAS encompass historic objects and artifacts that were made, used, or have particular pertinence to the Summerland District and immediately adjacent areas as described above. The Museum aims to acquire, preserve, catalogue, research, exhibit, and interpret artifacts that best serve to illustrate the pre-founding, founding, settlement, and development of Summerland. Consequently, the Museum strives to accept acquisitions that document Summerland's history from pre-contact, including local Indigenous history, to the present.

### 2.4 Contents of Collections

The SMAS collection encompasses books, implements, and tools from a variety of trades, clothing and household goods, furniture, First Nations artifacts, cartographic materials, photographs, ephemera, and archival documentation. It is the responsibility of the Museum to

acquire objects that are consistent with the purposes of the Museum and to maintain the objects within our permanent collection in perpetuity.

## 2.5 Governance

The Summerland Museum and Archives is run by the Summerland Museum and Archives Society. Governance is in the hands of a Board of Directors, consisting of five Executive members (President, First and Second Vice Presidents, Secretary, and Treasurer) as well as up to an additional six Directors, all of whom must be members of the Society. The Annual General Meeting and elections for members of the Board take place in March of every year. Board members must be informed of the collections policies and relevant documentation.

# B. COLLECTIONS MANAGEMENT

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## 3. Acquisitions

### 3.1 Introduction

The Museum's collections are separated into two categories: the Permanent Collection and the Education Collection. Unless otherwise stated ([3.8 Education Collection](#)), the guidelines below pertain to the permanent collection.

Objects accepted into the Museum's permanent collection are acquired to benefit the present and future generations of the Summerland District and are cared for by the Museum in perpetuity. It is the Museum's obligation to ensure that objects meet with the Museum's collecting goals, that good legal title is transferred for ownership of the item(s), and that ethical guidelines are followed. The policy for acquisition establishes guidelines for inclusion of items into the collection (see *SMAS Collections Procedures Manual* for details on how to implement these measures).

### *A Note on Terminology*

In the context of museum management, "acquisitions" refer to objects that the museum has legal ownership of (including the education collection), whereas "accessions" are those objects that have been recorded into the museum's permanent collection.

### 3.2 Authority

Ultimate authority for acquisitions to the Summerland Museum and Archives rests with the Summerland Museum Collections Committee, which has the legal authority to accept and refuse objects on behalf of the Museum. The Committee will exist of five individuals, including two representatives from the Board, a representative of the archival/curatorial department, and two volunteer members of the Summerland Museum and Archives Society. The Committee will meet quarterly to review donation requests, with special meetings as necessary. Decisions will be made by a majority vote (three), and in a case where a decision cannot be reached, the decision will be reverted to the Board. The Committee will work with Staff and the Board to ensure that collections policies are being followed and that the Museum's best interests are cared for.

In cases where the proposed acquisition is of particular importance to the Museum collections, is of a contentious nature, would take special effort to properly care for, or has a value greater than \$1000, the decision for acquisition rests on the authority of the Board of Directors.

No acquisition shall be made in which the conditions of the acquisition restrict the use of or the disposition of the object(s) by the Summerland Museum and Archives Society. If the object is of utmost importance to the history of Summerland and the donor insists on certain conditions, the Curator may make a recommendation to the Board.

### 3.3 Methods of Acquisition

The Museum acquires collections through donation, purchase, gift or bequest, exchange or transfer, and field collection. Donations are welcomed by making an appointment with staff. In the case of bequests, the Museum will only accept objects that fit the collections policy. Items found in the collection that are not accessioned but which meet the criteria of Accession Requirements may be considered for accessioning ([3.3.4 Found in Collection](#)).

#### 3.3.1 Purchase

An Acquisition to the Museum where an object is obtained in return for a price.

Funding for collection acquisitions may come from the annual budget or from special allocations for exceptional purchases. Purchases must reflect the needs and priorities of the Museum and must be approved by the Board. Prior to any purchase, it is the responsibility of the Board, with advice and recommendation from Museum staff, to ensure that the object(s) fit with the Collections Policy, that the price paid for the object(s) does not exceed fair market value, and that reasonable steps are taken to determine whether a comparable item can be obtained by gift or bequest.

Due to ethical considerations, purchases will not be considered from the Board, staff, or volunteers to SMAS, or their families, except in extreme circumstances where consultation with a third party appraiser is involved.

#### 3.3.2 Donation, Gift, or Bequest

The Museum encourages donations of materials that fit with the Collection Criteria and Collection Priorities. Objects with restrictions of any kind will only be accepted in extraordinary circumstances and with the authority of both the Collections Committee and the Board.

Bequests will be treated the same as any other donation, and the Museum will proceed according to the donation process. The Museum is under no obligation to accept any object(s) given under a bequest.

As a rule, the Museum will not accept items left at the site by anonymous parties, although items of exceptional historical value may be recommended for accession.

When donations are accepted, each donor will be asked to sign a *Gift Agreement*. The donor will then receive a copy of a *Gift Agreement*, the original of which will be kept by the Museum.

#### 3.3.3 Exchange or Transfer

Acquisition of objects by exchange or transfer will be limited to materials from other Canadian museums. All transfers will be accompanied by documentation recording the transfer and signed by representatives from both institutions.

#### 3.3.4 Found in Collection

Objects that appear within the collections without any documentation are termed “Found in Collections.” These include objects without a standard *Gift Agreement* (despite evidence of a

donor), without a *Lender Agreement* (despite evidence of there being a lender), and objects without an accession number. All reasonable effort will be made to determine the history of these objects; however, if staff is unable to determine ownership in a reasonable period of time, these objects may either be formally accessioned into the collection or disposed of.

### 3.3.5 Abandoned Objects

Objects left at the Museum without documentation or a *Gift Agreement* (abandoned goods) will not be accepted into the collection except under extreme circumstances where these items have exceptional historical value. Abandoned objects will be treated as abandoned goods, and unless in extreme circumstances, these items will be disposed of in whatever manner that staff at SMAS see fit (Education Collection, sale, etc.).

## 3.4 Accession Requirements

The Summerland Museum collects artifacts, photographs, and documents of significance to the Summerland area, particularly those which were made, used, or have particular pertinence to Summerland residents, businesses, societies, government, schools, churches, clubs, organizations, etc.

### 3.4.1 Collection Criteria

Objects will be accepted into the Summerland Museum's permanent collection only under the following criteria:

- The accepted item must be relevant to the collections mandate ([2.2 Mandate](#)).
- Documentation and provenance must be available.
- The condition of the item must be reasonable. The object will pose no danger or harm to staff or to other objects in the collection.
- Staff knowledge and storage are sufficient to properly care for the object.
- Conditional terms or donations with conditions will not be accepted.
- Duplicates will not be accepted unless with particular relevant provenance.
- The donor must demonstrate clear legal title, including physical title, as well as intellectual rights and/or copyright. Due diligence is to be made that the object has not been illegally obtained.
- Any objects definitely or likely recovered from an archeological site must have a documented provenance pre-dating 1970.<sup>1</sup>
- The Museum is considered the most appropriate institution to acquire the object over the interests of other collecting institutions.
- The item will not result in major expenses (conservation/maintenance) in the foreseeable future that the Museum will be incapable of fulfilling.
- The display or exhibit of a particular object is not guaranteed.
- If a donor proposes to donate an intact collection, the Museum accepts only those objects that are suitable for inclusion in its collections.

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<sup>1</sup> The year of the UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import and Export and Transfer of Ownership of Cultural Property.

### 3.4.2 Collection Priorities

Although SMAS will consider acquiring all objects pertinent to its collection mandate, priorities include:

- Items of which there is no previous type within our collections.
- Items associated with a particular cultural group or topic for which there is little material record (e.g. minority populations).

### 3.4.3 Standards

Acquisitions under consideration for accession shall enhance the SMAS' collections by meeting at least two of the following standards:

1. *Relevance*: The object supports the Museum's goals and provides information about Summerland.
2. *Historical Significance*: The object is associated with people, events, and places in Summerland or is of technical importance to the development of Summerland. Objects will also be of such quality, rarity, or of extreme intellectual value to support acquisition.
3. *Aesthetics*: Of high aesthetic quality.

## 3.5 Documentation

Written records are to be kept for all collections-related decisions. Staff members who are directly involved and trained in the management of the collection will fully document the process of acquiring an item into the collection.

- A donor form (*Gift Agreement* or equivalent) will be completed for each object.
- Any recommendations from the Collections Committee summarizing the decision to acquire or refuse the object.
- On acceptance, the signed donor form copy and a letter of acknowledgement will be sent to the donor.

### 3.5.1 Documentation for Oral Histories

The *Oral History Release Agreement* is to be completed by oral history participants. The original, signed agreement is to be kept at the Museum, and a copy is to be provided to the oral history participant.

## 3.6 Tax Receipts

Under the *Canadian Income Tax Act*, the Summerland Museum may issue a receipt for income tax purposes for the fair market value of the object donated.

- For objects accepted into the permanent collection that are perceived to be well below \$1,000.00 in value, the Curator may issue a tax receipt if both parties agree to the value.
- For donations close to or above \$1,000.00 in value, a third-party professional appraisal is required with a written appraisal provided. Fees for this service are borne by the donor. Appraisals need only be performed after an object has been accepted into the collection.

### 3.7 Ethical Guidelines

The Museum will follow ethical guidelines as described in the Canadian Museum Association's Ethics Guidelines (2006). British Columbia provincial legislation and Canadian federal legislation take precedence over SMAS policies. Of particular concern:

- Only objects for which the Museum has adequate resources (human, financial, time, and space) to document, preserve, store, research, exhibit, and interpret will be considered for entry into the Museum's permanent collection.
- Objects offered for sale or donation by Executive members, staff, volunteers, or their families, must meet standards for accession with no preferential treatment.
- In any case where a conflict of interest develops between the needs of the Museum and the needs of an individual on the executive, staff, or volunteer teams, the needs of the Museum will prevail.
- Executive, staff, and volunteer members are not permitted to compete with the Museum for objects, nor are they permitted to take advantage of privileged information for the development of their own collections.
- When working on projects for the Museum, Executive members, staff, and volunteers are not permitted to take any archival records offsite, all work should happen at the Museum.
- Failure to comply with these guidelines is considered ground for sanctions, including dismissal.

### 3.8 Education Collection

The education collection at SMAS is separate from the permanent collection with a separate selection, organizational, and numbering system. Standards of storage and care for this collection focus on educational use and enjoyment. Objects in the education collection are intended to be used and enjoyed directly by the public. They might be used in education programs, interactive exhibits, as props for displays, and other programming.

The education collection at SMAS integrates artifacts into an accessible and publicly available format. Items are only included in the Education Collection in cases where SMAS is able to properly store and interpret them. These artifacts are overflow from our main collection and are selected for the education collection based on the following criteria:

- Duplicates of better quality exist in the main collection
  - If there are multiples of identical or nearly identical objects, the main collection keeps the highest-quality objects and the education collection receives the lower-quality objects.
- Broken and repaired, of poor quality
  - When objects are in such poor condition that they cannot ever be displayed on exhibit but still offer educational opportunities, they are transferred to the education collection.
- Lack of Provenance
  - Provenance is the successive ownership or possession of the object that creates the story behind an object. If an object is given to the Museum with very little background and is from unknown or questionable origins, often the item will go to the education collection as useful and valuable teaching tools.

- Deaccessions
  - Objects deaccessioned from our permanent collection may be brought into the education collection under any of the above criteria.
- Special Donations
  - Donations from people specifically for our education collection so that they can be used and seen by children and members of the community.

## 4. Deaccessions and Disposal

### 4.1 Introduction

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. It is the obligation of the SMAS to preserve those items that fit our collecting mandate and guidelines, and in certain circumstances, it is necessary to dispose of items that do not meet these guidelines in order to focus our resources on those items that do. Deaccessioning policies and 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 deaccessioning are those to which SMAS has clear ownership or which fall under the umbrella of Abandoned Objects.

### 4.2 Authority

Removals from the collection will be initiated on the written recommendation of a qualified staff member. The Collections Committee will consider the recommendation, with the ultimate authority resting with the Board. Documentation of decisions and recommendations will be made in all stages and kept in perpetuity.

### 4.3 Reasons for Deaccessioning

Objects may be considered for deaccessioning under the following criteria. An object does not need to meet more than one of these standards to be considered for deaccessioning; however, fulfilling more than one of these criteria may be considered as stronger grounds for deaccessioning.

- The object is deteriorated in condition beyond any useful function for exhibition, research, study, or other purpose.
- The object is not relevant to the objectives and purposes of the SMAS, including to the guidelines outlined in the Accessions guidelines (see [3.4 Accession Requirements](#)).
- The object is more relevant to another institution's collection.
- The object is an unidentifiable piece or fragment.
- The object is unwieldy or of a large size, and the amount of storage space required exceeds the object's historical value or pertinence.
- The object is a duplicate with lesser provenance or documentation.

- The object is being repatriated (returned to the culture which produced it).
- The object is determined not to be authentic.
- The object is subject to restrictions which limit the object's use.
- The object requires specialized storage facilities or conservation care which SMAS cannot provide.
- The object has a serious lack of documentation (provenance), nor known local connection.
- The object is a threat to any of the following: the collection, visitors, or staff.

## 4.4 Disposal

The disposal of items will be taken under the guidelines outlined in Section 4 of *Procedures Manual* (Deaccessioning). These guidelines include:

- The object will be considered for use in the Museum as part of the [Education Collection](#).
- To the extent as which can be reasonably expected, the object will be offered to another non-profit institution (as in cases where it may be more relevant). Such offers are to be made in writing, with all documentation to be kept within the object file.
- In the rare case in which an object is sold, proceeds are to be used for the direct care of SMAS collections (for example, improving collection storage, conserving an artifact, or purchasing an artifact for the collection). There will be a separate budget line designated for the purposes of tracking these funds.
- Sale of objects is to be done based on fair market value. Under no circumstances will a deaccessioned object 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 such an 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. The original donor (or their family) may purchase the artifact back at public auction.
- If no other option is available, or if the item is in such poor condition as to be useless for transfer or sale, the item is to be physically destroyed. This process will be complete and irreparable and is to be witnessed by two individuals at the SMAS (staff, volunteers, or Board members). Documentation confirming the action is to be stored in the object file.

## 4.5 Documentation

All documentation pertaining to an item that has been deaccessioned will be kept in perpetuity, including:

- A complete record of the item (with photo).
- The process towards the decision to deaccession the object.
- The date of deaccession.
- The date of actual disposal.

- The method of disposition.

## 5. Lending and Borrowing

### 5.1 Introduction

The Summerland Museum and Archives supports the responsible use of its collections by other organizations. The Museum also supports borrowing of objects from other institutions and private individuals for the purposes of education, display, and interpretation. Loans can be made to other institutions when items from the Museum's collections will increase the educational or interpretive value of an exhibition or where material offers credible research value to that same institution.

### 5.2 Authority

Object(s) are to be lent and borrowed under the authority of qualified collections staff. Included in this authority is the right to refuse the loaning out of particular objects within the collection; however, sufficient reason must be given for such refusals.

### 5.3 Documentation

A loan agreement is to be created for every loan. This agreement is legally binding. Any records associated with loaning or borrowing collections material, including applicable agreements and documents, are kept in a secure location. Condition reports are made for all objects leaving or entering the Museum.

### 5.4 Criteria for Lending Objects from the Museum (Outgoing Loans)

Loans of Museum collections to outside parties will be for a definite and demonstrated purpose over a finite period of time. The SMAS does not provide "permanent loans." It is strongly presumed that the Borrower be another qualified institution; however, short term loans to individuals may be considered at the discretion of the Curator for educational purposes. In this case, short term loans of less than one week duration may be considered.

Collections material may be loaned from the Museum under the following criteria:

- The loaning process (including transportation and use) will not irreparably harm the object(s) under reasonable circumstances. Objects that are physically unstable will not be considered for loan, with decisions pertaining to accessing said stability resting with qualified staff members.
- Loans will not exceed a period of three years, but may be renewed.
  - Renewals must involve a written request/document by the Borrower and a written response by SMAS staff.
  - Renewal requests must include a brief report by the Borrower that includes comment on the condition and an update on the items.
- Borrowers must be able to adequately care for the object(s) with regard to providing adequate environmental conditions, security, and conservation measures. Standards for this care are to be demonstrated and deemed appropriate by qualified representatives of the Museum.

- The SMAS may request financial reimbursement from the Borrower to cover loss in value and/or the cost of repair/restoration of damaged loan items.
- All outgoing loans are subject to an *Agreement of Outgoing Loan* form (see Associated Documents) completed in its entirety by the Museum and the Borrowing party.
- Loans and loan agreements are not transferable to other Borrowers or to other locations.

## 5.5 Criteria for Accepting Loans into the Museum (Incoming Loans)

Object(s) may be accepted as loans on a temporary basis by the Summerland Museum only for a clear and demonstrated purpose (an exhibition) or for educational or research reasons. Unless in exceptional circumstances agreed to by Museum Management and the Board of Directors, the Summerland Museum does not accept loans for the purpose of storage. In such cases, insurance for the object(s) is the responsibility of the lender.

Items will be borrowed from organizations or individuals outside of the Museum on the following criteria:

- The lender must be able to demonstrate sufficient legal title to the object.
- The Museum is able to properly care for the object and has sufficient resources (including knowledge and training) to do so.
- The period of the loan is a firm and set period of time. All loans MUST have an expiry date noted.
- Loans will not exceed three years in duration, but may be renewed.
- Indefinite or permanent loans will not be accepted under any circumstance.
- All incoming loans are subject to the terms and conditions described in the *Agreement and Certificate of Incoming Loan* document (see Associated Documents) and must be completed in its entirety by the Lender and the Museum.

## 5.6 First Nations Artifacts

Special care is to be taken in the lending or borrowing of First Nations material. In the case of requests for First Nations artifacts to be lent to other institutions, the Museum will consult with the originating group in all stages of the process, including the desirability for the object to be loaned, and in determining stipulations for appropriate care within the loan agreement.

In cases where First Nations groups make requests for the loan of objects from the Museum for ceremonial, religious, or educational use, these cases are considered exceptional circumstances, and exceptions may be made to strict environmental conditions as described in [5.4 Criteria for Lending Objects from the Museum \(Outgoing Loans\)](#). Proposed uses are to be considered, particularly in cases where the cultural significance and community value of these objects outweighs the requirement for stringent conditions of care. Decisions in these cases are to be made under the cooperation of the requesting party and the Museum.

## 5.7 Repatriation

The SMAS recognizes the uniqueness and distinctiveness of the Indigenous peoples of Canada and is committed to working respectfully with the communities from whom the Museum's collections have originated. Discussions regarding repatriation are governed by this principle.

Repatriation may be initiated at the request of communities or by the Museum. All repatriation requests are responded to in a timely manner and action taken within a reasonable time frame, treating each request with due respect and serious attention.

In the repatriation process complex issues may arise. In many cases, there may be no clear evidence, either written or oral, on the method in which the object came to the Museum. Each object considered for repatriation is done so on a case-by-case basis. All objects are reviewed by the Collections Committee, and those approved by the Committee, will be submitted to the Board of Directors for approval.

- Objects considered for repatriation include but are not limited to burial objects and sacred objects.
- Each repatriation request must be made in writing and will be considered from Indigenous individuals, at the request of Indigenous governments, and in the context of treaty claims and negotiations. The Museum may also initiate the repatriation process.
- Each request for repatriation will be reviewed according to the historical relationship of the requestor(s) to the objects concerned and to the conditions under which the materials were acquired by the Museum.
- The SMAS will exercise due diligence in notifying other groups or individuals who it reasonably believes may have an interest in requests that are made for repatriation.
- Burial objects from the graves of individuals or groups of individuals will be returned either to the identified descendants of the interred or to an affiliated Indigenous group.
- All requests for repatriation and negotiations pertaining to the repatriation of objects will be fully documented and maintained indefinitely.

## 5.8 Unclaimed Loans

In the case of unclaimed loans, all reasonable efforts will be made to contact the lender. For recent loans supported by a loan agreement, a clause in that agreement stipulates that ownership of the object(s) reverts to the Museum after being unclaimed for a period of 90 days following the end of the loan period. In the case of loans before such an agreement existed, every effort is to be made to contact the original owner (or his/her descendants as applicable) to either return the object or to obtain full legal title to the object.

# 6. Access to Collections

## 6.1 Introduction

The Summerland Museum and Archives allows access to its collections through the presentation of exhibitions, loans to other institutions, publications, and through the website. SMAS also supports research and study through access to its collections and archival holdings on site at the Museum. While the majority of materials in the custody of SMAS are open to

research without restrictions, in some cases access to sensitive materials may be restricted. The Museum reserves the right to refuse access to its collection and research areas to any individual misusing the collection or behaving in a manner contrary to the Museum's goals and ethics.

## 6.2 Conditions of Access

The Summerland Museum and Archives will make all reasonable attempts to provide requested material for research use; however, this ability is contingent on ongoing collections organization efforts and is not guaranteed. Access to and use of the collection is at the discretion of Museum staff and is generally provided to any person who can demonstrate a need.

Determining factors include:

- Condition of the artifact or specimen
- Risk to the artifact or specimen
- Location
- Security
- Health and safety risks
- Copyright
- Intended use
- Expertise of the enquirer
- Human and financial resources available

Although all requests will be considered, to best ensure access to requested materials, researchers are encouraged to contact the Summerland Museum at least one week prior to visiting to set up an appointment.

All researchers must abide by the Research Area Rules (see Associated Documents).

## 6.3 Research Access and Use

The Summerland Museum does not employ a full-time researcher, and staff at the Museum will only complete public research requests contingent on the availability of appropriate staff time and resources. Any research conducted by staff beyond an initial 20 minute period will be charged at a flat hourly rate.

In the interests of keeping to an educational mandate, the Summerland Museum offers non-commercial use of its collections at a discounted fee.

All research requests must be clearly made in writing. Research requests will be kept in accordance with British Columbia's Privacy Legislation. Completed forms will be stored on site for a period of one year after the date the request is completed. After this one-year period, the form will be permanently destroyed.

## 6.4 Fees and Reproduction

Fees for archival services (staff research, photographic reproductions, digital scans of records, photocopies, etc.) are to be set by staff. Fees are to be reviewed every three years. The current fee structure can be found in the Associated Documents (Fees for Archives Services).

The Summerland Museum permits the reproduction of archival and photographic materials in its collection that are the property of the Museum. This service is available under the following conditions:

- The intended use for copied materials must be stated when the request is made as part of the *Permission for Use Application* (see Associated Documents). The application must be completed in its entirety and signed by both parties before the request can be processed.
- Staff will approve reproduction requests and assign appropriate fees according to the fee structure.
- Photographs and documents deemed too fragile or sensitive to light will not be copied or photographed.
- A 50% deposit will be paid by the requesting party before a work order is issued.
- The Summerland Museum and Archives must be credited for any use of its collection.
- Reproduction is permitted for one-time use only. Subsequent or different use of an image, including subsequent editions or printings, constitutes reuse and requires renegotiation and repayment.
- Anyone found infringing upon these conditions, or acting against the best interests of the Museum, will not be allowed future access to the Museum's archival collections.
- Fees will be used by the Summerland Museum to support activities of collecting, preserving, and making its photographic holdings available.

## 7. Collections Storage

Objects will be stored in a safe manner that limits potential damage from threats (fire, earthquakes, insect infestation, etc.).

Personal safety will be the highest priority and objects must be stored and used in a manner that protects the Staff.

Objects will be stored in a secure manner that prevents unauthorized access. They will be handled and used only by appropriately trained people.

## 8. Collections Care and Conservation

### 8.1 Introduction

The Summerland Museum and Archives Society acknowledges that they are responsible for the safekeeping and care of the collection and for making it available to the public. The purpose of conservation is to minimise the reduction of public benefit caused by deterioration or damage to the collection. The Museum acknowledges that a balance must be made between the preservation of the collection for the future and the benefit of the collection to the public for research, exhibition, and educational purposes.

### 8.2 Preventive Conservation

Preventive conservation includes all actions to slow the deterioration of objects and to protect them from potential damage. The actions are non-intrusive and include maintenance of safe storage, handling, transport, and display conditions to ensure stable environments and conditions in which deterioration and damage are reduced to a minimum.

- The SMAS will strive to provide and monitor environmental conditions keeping with currently accepted standards for relative humidity, temperature, and light levels in all exhibition spaces, storage areas, and wherever else objects are kept or stored.
- Objects will only be handled by personnel trained in the correct methods of care for the objects. The Museum will provide proper training for all staff and volunteers in proper handling of artifacts on a regular basis.
- The Museum will establish procedures and provide support for protection of the collection from damage or loss through fire, flood, theft, vandalism, accident, and damage from insects, pests, vermin, and improper housekeeping practices.

### 8.3 Treatment Conservation

Treatment Conservation is the application of science to the examination, maintenance, and treatment of artifacts or specimens. The aim is to halt or reverse damage or deterioration of a museum object and involves interventions to the physical structure or properties of an object (cleaning or stabilization).

Conservation measures include restoration, which includes cleaning, mending, replacing missing parts, corrosion and tarnish removal, straightening crooked pieces, and other processes.

- Cleaning, repair, restoration, or conservation treatment of any artifact in the permanent collection will only be carried out when appropriate and only by a professional conservator or fully trained and supervised staff.
- Conservation and restoration treatments will have minimal intervention in the fabric of the object.
- Whenever possible, reversible techniques or materials will be used in treatments.
- Restorations will be historically accurate, but will not be deceptive as to originality. The treatment will be easily detectable, although not necessarily conspicuous.
- Documentation (written and photographic) will be completed for any treatment done.

### 8.4 Priorities

The SMAS will apply preventive conservation measures over treatment conservation, and conservation treatments will take precedence over restoration. Preventive conservation provides the most effective use of resources for the continued preservation of the collection.

The SMAS has an education collection of artifacts for use by the public and school programs. The items in the education collection can be handled or operated by staff, volunteers, and the public. The permanent collection will take priority over the education collection in applying conservation measures.

All physical interventions will be based on research intended to identify and safeguard historical values. The history and evidence of past use of the item will be respected, and contributions from all periods of the item's existence will be taken into account when deciding the appropriate level of intervention. Any physical intervention will be fully documented, including photos, and

will include the reason for it, what the intervention was, who performed it, and when it was carried out.

## 8.5 Authority

- All staff are responsible for maintaining the security of the collection, including protection from damage, deterioration, or loss.
- Staff will strive to establish and maintain a high standard in conditions of storage, display, use and handling of the collection.
- Staff with access to the collection must use appropriate care and handling techniques. Any volunteers assisting with collections care will be trained in appropriate care and handling techniques.

## 9. Exhibition and Displays Policy

### 9.1 Introduction

The Summerland Museum has two main displays: permanent displays (which encompass much of the main floor of the Museum) and temporary displays (which are located in the Tait Room).

The Exhibition and Displays Policy establishes guidelines of the Summerland Museum for all displays or exhibitions mounted and/or hosted by the Museum. The Summerland Museum is funded by the Municipality of Summerland and is responsible for serving the needs and expectations of both residents and visitors. The policy ensures that the motivation behind each exhibit is consistent with the Museum's statement of purpose and is attentive to the interests of the community. As a community museum, the Summerland Museum respects both curatorial standards and the public interest in selecting and presenting exhibitions.

### 9.2 Purpose and Aims

Displays at the Summerland Museum play a central role in helping the institution achieve its core objectives:

- To further knowledge, understanding, and enthusiasm for the history of the Summerland District.
- To provide enjoyment and thoughtful experiences for all visitors regardless of their background, race, nationality, gender, disability, or educational attainment.
- To maintain, extend, and broaden the range of audiences.

### 9.3 Principles

It is the goal of the Summerland Museum to provide thoughtful and creative displays that reflect important historic issues and events, as well as any contemporary ties, which are pertinent to the Summerland area. The Museum aims to explore these issues within their broader regional, national, and global narratives.

- Displays must meet the needs of audiences ranging from the casual observer to the specialist. All displays will be accessible on a number of levels. The language used will be clear and readily understandable.

- Each display will have a definite theme or context. The layout of the display, including panels and labels, will make clear how each object illustrates and supports the theme.
- Objects will be displayed with sensitivity to cultural differences.
- When producing exhibitions, the Museum will endeavour to use as much of the stored collection as possible.

## 9.4 Development

- Exhibitions are developed under the guidance of qualified staff. Staff are recognized as the leaders of a team that may include volunteer involvement. The team is responsible for thoroughly researching the theme, professionally handling the artifacts, and displaying objects according to current museum standards.
- All written material will be approved by staff before the exhibition to ensure accuracy and objectivity. Information will be precise and simple.
- Only those artifacts which will not be damaged by display conditions will be included in exhibits. Photographs, reproductions, or artistic representations may be substituted for original artifacts to meet conservation or security concerns.
- All borrowed material requires a signed loan agreement and is subject to the terms described in the loan policy.
- In the case of a special interest or community group developing its own exhibition at the Museum, both the group and the Museum will negotiate and agree upon terms and conditions of the exhibition. These terms are written and distributed to all parties involved in the exhibition.
- The theme for temporary exhibitions will usually be agreed upon at least twelve months in advance; however, flexibility is encouraged to respond to events.

## C. OPERATIONAL POLICIES

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### 10. Volunteers

#### 10.1 Introduction

The Summerland Museum and Archives Society relies on volunteers to further its mission. The Museum aims to capitalize on the diverse strengths and talents within the community in order to further the Museum's goals while providing an opportunity for people to share their knowledge and experience with others. SMAS will place volunteers in positions that match their skills and interests; provide all volunteers with orientation, training, and continued support; and provide a safe and rewarding work environment.

#### 10.2 Recruitment

All volunteers are required to complete a volunteer application form and, as applicable when working with children or vulnerable populations, a Criminal Record Check. The *Volunteer Application* (Associated Documents) requires specific background information including prior volunteer experience, training, education, employment history, motivation for volunteering, and preferences for assignment. References are also required.

### 10.2.1 Privacy and Confidentiality

Upon acceptance into the Volunteer program, and before the beginning of placement, all volunteers are required to sign a *Privacy and Confidentiality Form* (see Associated Documents), acknowledging that they have read and accept the Museum's Confidentiality Policy (see [Section 10. Privacy and Confidentiality](#)).

### 10.3 Documentation

Documentation for each volunteer, including their *Volunteer Application Form*, *Privacy and Confidentiality Form*, contact information, information on the position given, and information on Criminal Records Check, will be kept in a secured, designated file. Maintenance of the information in this file will be governed by the Privacy of Information Guidelines as established by the Government of British Columbia.

Documentation will be maintained by the Volunteer Coordinator, with the assistance of staff as applicable.

### 10.4 Expectations

- Volunteers will work under the direction of qualified, paid staff and with the support of the Volunteer Coordinator.
- Volunteers will be informed of the collections policies and relevant required documentation.
- Volunteers will not be used to accomplish tasks normally maintained by paid staff.
- A proposed placement will be discussed with the volunteer, and detailed, written information about the position will be given prior to a final assignment.
- Closure interviews will be conducted with each volunteer to evaluate the objectives of the program/project.

## 11. Privacy and Confidentiality

### 11.1 Introduction

The Summerland Museum and Archives is committed to respecting the privacy and confidentiality of all of its clients, donors, lenders, members, staff, volunteers, and Board members. All personnel including employees, volunteers, and Board members are expected and required by accepting a position at the Summerland Museum and Archives to abide by the guidelines set out in the confidentiality policy below.

### 11.2 Confidentiality Policy

It is the policy of the Summerland Museum and Archives that Board members, employees, and volunteers of the Museum will not disclose confidential information belonging to, or obtained through their affiliation with the Summerland Museum and Archives to any person, including their relatives, friends, and business and professional associates, unless the Museum has authorized disclosure. Such information must be kept confidential both during and after employment or volunteer service. This policy is not intended to prevent disclosure where disclosure is required by law.

All information concerning our clients, donors, lenders, members, staff, volunteers, financial data, and business records, the management and security of the institution, and any future or unannounced events of the Summerland Museum and Archives is confidential. “Confidential” means that you are free to talk about the Summerland Museum and about your position, but you are not permitted to discuss or disclose personal and financial information with anyone without permission or appropriate authorization. Board members, volunteers, and employees are cautioned to demonstrate professionalism, good judgement, and care to avoid unauthorized or inadvertent disclosures of confidential information and should, for example, refrain from leaving confidential information contained in documents or on a computer screen in plain view. They must exercise caution where there is reason to believe that unrestricted access to information could lead to the abuse of significant sites or material.

Upon separation of employment or expiration of service at the Summerland Museum, any materials containing privileged or confidential information must be returned.

Unauthorized disclosure of confidential or privileged information is a serious violation of policy and will subject the person who made the unauthorized disclosure to appropriate discipline, including removal/dismissal from service at the Summerland Museum and Archives, removal from the Museum’s membership, and legal action.

### 11.3 Privacy and Access to Information

The Summerland Museum and Archives Society follows the guidelines set out by the Government of British Columbia in collecting and storing personal information. The Museum collects the minimum amount of personal information necessary to carry out its duties to the public and to its members. The use of personal information on forms, contracts, and agreements is limited to the purposes of the original agreement.

#### 11.3.1 Maintenance and Access to Permanent Agreements

Permanent agreements with the Museum, including *Gift Agreements*, *Permission for Use* forms, loan agreements, and employment or volunteer contracts will be kept in perpetuity. Access to personal information on these forms is limited to the purposes of the original agreement and is not freely accessible to members of the public or to members of the Summerland Museum and Archives Society. Access to the information contained in these forms will be granted on a case-by-case basis following British Columbia law and upon demonstration of reasonable requirement and use.

#### 11.3.2 Maintenance and Access to Temporary Forms

Temporary forms, including research requests, will be kept only so long as they are required to satisfy the applicant’s needs. As the information contained on the research request may be of use or directly affect the individual applicant, these forms will be kept for a period of one year. After that time, the form and all information it contains will be destroyed.

#### 11.3.3 Maintenance and Access to Membership List

The Membership List is regularly updated upon the enrollment and payment of fees by new and existing members. All memberships expire on April 30; however, memberships completed between January and April are good until the following year.

The Summerland Museum and Archives abides by Canada's Anti-Spam Legislation and requires signed consent to send electronic communications to its members.

Membership information of deceased members will be maintained on a separate list for reference purposes only (e.g. in determining donor identities), and every effort will be made to remove this information from the active membership list in a timely fashion.

The Summerland Museum abides by the *B.C. Societies Act*, under which any member may request access to the Museum's current Membership List. Access to this list is done with respect to the privacy of other members, and only one method of contact (e.g. the address) will be provided to the requesting member. Access to email and telephone numbers is restricted.

## 12. Bullying and Harassment Policy

### 12.1 Introduction

Summerland Museum personnel are entitled to a safe and stress free working environment. The Summerland Museum will not tolerate any form of harassment or bullying in the workplace, and all incidents must be reported and investigated immediately.

### 12.2 Scope of Application

This policy applied to all SMAS personnel including permanent, temporary, casual, contract and student workers, volunteers, Directors, contractors, visitors, and members of the Museum society. It applies to face-to-face and electronic communications, such as email and social media.

### 12.3 Definitions

#### 12.3.1 Bullying/Harassment

Bullying and harassment is described as any action that is taken by an individual or group that they knew or can reasonably be expected to have known would cause an individual to be humiliated or intimidated. This includes behaviours that discriminate against, dishonour, and discredit or cause stress based on gender, colour, religious beliefs, or ethnic background, and especially behaviours that affect an individual's ability to carry out their duties.

Bullying and harassing behavior CAN INCLUDE but is not limited to:

- Verbal or written aggression, derogatory statements, insults, or threats about an individual, to that individual, or in a public manner.
- Spreading malicious rumours.
- Calling someone derogatory names.
- Causing damage to an individual's possessions in a deliberate manner.
- Criticizing a person's work performance without giving constructive advice on how to improve.
- Isolation and/or exclusion from work-related activities.

Bullying and harassing behaviour DOES NOT INCLUDE:

- Expressing differences in opinion.
- Offering constructive feedback, guidance, or advice about work-related behaviour.

- Reasonable action taken relating to the management and direction of employees or the place of employment (managing performance, taking reasonable disciplinary actions, assigning work).

### 12.3.2 Workplace

The workplace is not confined to the Summerland Museum. Harassment can occur during or after work hours, and on or off Summerland Museum property. Harassment can occur during travel, work-related social gatherings, through internet communications, or at any other location where the prohibited conduct may have a subsequent impact on the work relationship, environment, or performance of any person to whom this policy applies.

## 12.4 Employer and Supervisor Responsibilities

It is the responsibility of Museum management to make sure that all employees understand their duties and how to carry them out. They are also responsible to ensure the Harassment and Bullying policy is part of the initial orientation for all staff and volunteers at the Summerland Museum.

It is the responsibility of the Museum Board to ensure that the Summerland Museum implements policies and procedures which provide all Museum personnel with a safe work environment under the Canadian Charter of Rights and Freedoms.

## 12.5 Steps to Resolve a Complaint

### 12.5.1 Complainant

The complainant is the individual who makes a complaint or files a formal objection regarding bullying or harassing behaviour against them. It is the responsibility of the complainant to:

1. When appropriate, initiate a discussion with the individual or group who is alleged to be engaged in bullying behaviour. Inform the individual or group of the particular behaviour in question, and tell them how it makes you feel. Try to resolve the issue.
2. If you (the complainant) do not feel comfortable following (1), immediately report your concerns to your supervisor in both verbal and written form, using the *Workplace Bullying and Harassment Complaint Form* (Associated Documents).
3. When the immediate supervisor is the alleged bully, report your concerns to an appropriate third party within the Summerland Museum organization, such as another member of the Executive team.

### 12.5.2 Supervisor

Depending on the role and position of the Complainant, the supervisor may be a senior staff member, the Personnel Director, or the Volunteer Coordinator. It is the responsibility of the supervisor to:

- Undertake prompt and diligent action to address incidents and complaints of bullying and harassment.
- Provide fair and impartial evaluation of all allegations, providing both the complainant and the respondent equal treatment in responding to concerns.
- Be sensitive to the interests of all parties involved and to maintain confidentiality.

Upon issuance of a complaint, the supervisor will undertake the following procedures:

1. Listen to the issues brought up by the Complainant and go over the “Workplace Bullying and Harassment Complaint Form.” Discuss ways to solve the issue.
2. Meet with the individual or group “charged” with alleged bullying to discuss and hear their side of the issue.
3. Meet with both parties to try to solve the issue.
4. Interview witnesses if applicable. Review documents if applicable and necessary.
5. If the issue cannot be solved by a discussion with both parties, and to the satisfaction of both parties, then the Formal complaint shall go to the Director of Personnel.

### 12.5.3 Director of Personnel

The Director of Personnel is a Board Member who has the responsibility and authority to investigate and mediate unresolved complaints regarding personnel. It is the Director of Personnel’s responsibility to:

1. Re-interview both parties and witnesses if applicable.
2. Determine if the complaint can be resolved ‘in-house’ or whether an outside body should be brought in to resolve the issue.
3. Determine what disciplinary action should be taken, if any.

## 12.6 Timeline

The Summerland Museum and Archives will, to the best of its ability, address and resolve all bullying and harassment complaints in a prompt and thorough manner. Once a plan of action has been determined to address a complaint, a timeline will be established to conduct a follow-up to ensure that the issue has been resolved. Follow-up will include a description of corrective actions, a time frame, and a means for dealing with results of the behaviour. If, by the end of this timeline, the issue is still open, further action must be taken.

## 12.7 Appeal Process

Both the complainant and the person “charged” with harassment or bullying behaviour are free to appeal the outcome of the investigation.

- An appeal must be made in writing without unreasonable delay, no later than 30 days after the decision.
- Full details on the reason for appealing the decision must be provided.
- Every effort must be made to follow the current corrective actions while the appeal is reviewed.
- An appeal meeting will be arranged to discuss the appeal, including a different Board member, and/or an unbiased third party.
- A final review will be provided in writing within one week of the appeal meeting.

## 12.8 Documentation

The Summerland Museum and Archives expects that personnel experiencing or witnessing alleged/suspected bullying and harassment will complete the *Workplace Bullying and*

*Harassment Complaint Form*. These records, and all records relating to the investigations and findings, will be kept in a secure and confidential manner.

### 13. Implementation of Policy

The Museum Board, relying on the professional competence of the curatorial and collections staff and outside experts, is responsible for ensuring compliance with this policy and for developing relevant procedures.

## D. Definitions

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**Accession:** An object acquired by a museum as part of its permanent collection (n.); the act of processing and recording an addition to the permanent collection (v.).

**Acquisitions:** Objects to which the museum has legal title of ownership.

**Appraisal:** An estimate of fair market value of an object. Fair market value is the price the object would fetch on the open market between a willing buyer and a willing seller in an arms-length transaction, where each party has full knowledge of facts.

**Bylaws:** Procedural rules that govern the museum and its membership, spelling out the museum's administrative authority in rules and regulations.

**Conservation:** Actions taken to safeguard cultural and scientific objects and ensure their preservation for the future. The purpose of conservation is to study, document, retain, and restore the original significance of an object or specimen using techniques that involve the least possible degree of intervention.

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

**Donation:** Any material acquired by the museum as a gift. The donor voluntarily transfers ownership of the material to the museum without any expectation of material benefit from the transaction. Donations can be made as bequests, where material is transferred to the museum under the terms of a will.

**Education Collection:** Separate from the permanent collection, the education collection consists of objects intended for direct use and enjoyment by the public, including public programming, education programs, and as display props.

**Fair market value:** The price at which property changes hands on the open market between a willing buyer and a willing seller, acting independently, neither being under any compulsion to buy or sell, and both having reasonable knowledge of the relevant facts.

**Fiduciary:** A designation for something that is held in trust for another. Fiduciary Responsibilities are the public trust obligations carried by the museum as an organization and by its governing authority.

**Field Collecting:** The practice of gathering objects from their native environment for the museum's collections. Field collecting brings artifacts and specimens to the museum's collections as a result of research and exploration undertaken by museum staff.

**Gift Agreement:** A signed, dated document that records the legal transfer or title. It includes a brief description of the object and a statement that the rightful owner gives up all rights and title to the object. The Museum retains a signed gift agreement as proof of its legal ownership of the donation, and a copy is returned to the donor.

**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.

**Loan:** Term that describes objects temporarily released from the museum's collections to another organization, or temporarily borrowed by the museum from an individual or organization. Loans do not involve any change in ownership.

**Mission statement:** A statement of purpose that provides a succinct declaration of why the museum exists and what it is set up to accomplish.

**Permanent Collection:** The permanent collection at the museum consists of all donations, purchases, or bequests, which are held in trust for the public. Ownership of all objects is transferred to the Museum at the time of acquisition. Display of the permanent collection is determined by the Museum, and any items not on display are stored in secure storage. The permanent collection is handled by the curatorial staff only.

**Policy:** A statement outlining a principle or a course of action. Policy defines how the museum's public trust is to be fulfilled, provides trustees and staff with the authority and guidance they need to do their jobs, clarifies expectations, and provides a concrete method of accountability.

**Preventative conservation:** Measures (other than invasive procedures) designed to retard the deterioration of objects and specimens, or to protect them from potential damage. Prevention focuses primarily on monitoring for pests and controlling the environment (temperature, humidity, and light levels) that surrounds objects in storage and exhibition areas.

**Procedures:** Established methods directing the implementation of policy with respect to the museum's daily operations.

**Provenance:** In museums, the successive ownership or possession of an object; in archives, the individual or group responsible for creating or collecting records as part of their responsibilities.

**Purchase:** An acquisition made by the museum where an object is obtained in return for a price. The legal documentation of a purchased acquisition is the bill of sale which, along with any other documentation relating to the purchase, should be retained with the collection records.

**Repatriation:** The process of restoring or returning objects to the culture, nationality, or country of origin. Repatriation can be requested by representatives of the object's culture, nationality, country, or it can be initiated by the museum. The process can be undertaken on legal and/or moral grounds.

**Strategic plan:** A planning document that focuses on defining the museum's mission within the broad context of societal and economic issues in which the museum must survive and flourish. It identifies the goals the museum must meet to move forward into the future.

**Terms of reference:** A brief document that provides a clear description of work which has to be done. Its purpose is to clarify roles, responsibilities, and outcomes for tasks or projects which are to be accomplished by a group working together.

**Treatment conservation:** Measures designed to halt or reverse the effects of damage or deterioration sustained by a museum object. These measures involve some degree of intervention and should be undertaken only by appropriately trained conservators.

**Vision statement:** A statement of why the museum does what it does. Vision statements provide an overall vision of what the museum can accomplish rather than a list of the functions it undertakes. They are useful for public promotion and may appear on the museum's business cards, stationary, or advertising. They provide a public declaration of the museum's long term vision, of what it is trying to become, and what distinguishes it as a cultural resource.

## E. Associated Documents

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The associated forms/documents included are as follows:

1. Deed of Gift Agreement
2. Receipt for Income Tax
3. Oral History Release Agreement
4. Record of Transfer
5. Deaccession Recommendation
6. Agreement of Outgoing Loan
7. Agreement and Certificate of Incoming Loan
8. Research Area Rules
9. Fees for Archives Services
10. Research Request Form
11. Permission to Use Archival Material Reproductions
12. Volunteer Application
13. Privacy and Confidentiality Form
14. Membership Application
15. Workplace Bullying and Harassment Complaint Form
16. Workplace Bullying and Harassment Investigation Form

Other forms/documents can be found in the Collections Procedures Manual.

## Deed of Gift Agreement

Summerland Museum & Archives Society  
Phone: 250-494-9395



Received from:

<b>Name</b>	<b>Phone number</b>
<b>Address</b>	<b>Email</b>

The Summerland museum gratefully acknowledges receipts of the archival material listed below.

<b>Accession number:</b>
<b>Description:</b>
<b>Condition:</b>
<b>Restriction</b>

I/we, the undersigned, being the lawful owner of the material listed above, hereby give and transfer full title to and interest in the same to the *Summerland Museum & Archives Society* forever. The *Summerland Museum & Archives Society* shall hereafter have and retain exclusive and absolute physical ownership of the material. This archival material may be placed, loaned, or disposed of in such a manner as the *Summerland Museum & Archives Society* may deem advisable in accordance with archives policy. The *Summerland Museum & Archives Society* also provides access to and may display the material.

Copyright transferred \_\_\_\_\_

Moral right waived \_\_\_\_\_

\_\_\_\_\_  
Owner's or Agent's signature

\_\_\_\_\_  
Accepted on behalf of the Summerland Museum

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Archival material not retained by the Summerland Museum is to be disposed of the following manner:		
Return to donor	Transfer to another institution	Dispose of

(Donor to initial)

OFFICIAL RECEIPT FOR INCOME TAX PURPOSES

## Summerland Museum & Archives Society

P.O. Box 1491 Summerland BC V0H 1Z0 Tel. 250-494-9395  
www.summerlandmuseum.org info@summerlandmuseum.org  
Charity/BN Registration #119205334 RR0001

<b>Donation received:</b>	
Receipt number:	
Receipt issued:	
Donor name:	
Address:	
City, Province:	
Postal Code	
Total amount of cash received by organization:	
Value of advantage:	
Eligible amount for tax purposes:	

\_\_\_\_\_  
**Authorized Signature**

For information on all registered charities in Canada under the *Income Tax Act* please visit:  
Canada Revenue Agency [www.cra-arc.gc.ca/charities](http://www.cra-arc.gc.ca/charities)

**ORAL HISTORY PARTICIPANT CONTACT INFORMATION**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
(Town/City)

\_\_\_\_\_  
(Province)

\_\_\_\_\_  
(Postal Code)

Email: \_\_\_\_\_ Ph: \_\_\_\_\_

**AGREEMENT**

I \_\_\_\_\_ agree to take part in a recorded interview and consent to the following.

- The Summerland Museum and Archives (hereafter the Museum) may use, at their discretion, the interview and related recordings, in whole or in part, for purposes including but not limited to: the development of exhibitions, public programming, educational materials, public broadcast, research, publications, documentaries, public performances and presentations, communications and promotional materials, distribution via electronic media, the Internet and social media tools, and may be licenced to third parties at the Museum's discretion.
- The original recording, copies, and all related materials will be preserved in the Museum's archive.
- The interview and related recordings will be made available to the public through the Museum's archive. The interviews will be made available in accordance with the restrictions agreed upon between the interviewer and the interviewee.
- I transfer to the Museum legal title, all literary rights, digital and electronic rights, including copyright, of this interview.
- I understand that participation in the interview is entirely voluntary and I am free to withdraw consent at any time without consequence.
- The stories I share are irrevocably my own and may be recounted and recorded in other contexts. The Museum grants me a copy of the interview recording to use at my discretion through my lifetime.

I, the interview participant, have read the above and voluntarily offer the Summerland museum and Archives full use of the information contained on the recordings and related materials.

**SIGNATURES**

\_\_\_\_\_  
Signature of Interview Participant

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Museum Representative

\_\_\_\_\_  
Print Name & Title

\_\_\_\_\_  
Date



Summerland Museum & Archives Society  
**RECORD OF TRANSFER**

PO Box 1491, Summerland B.C. V0H 1Z0  
P. 250.494.9395 E.info@summerlandmuseum.org  
www.summerlandmuseum.org

**Date:**

<p><b>Transmitting Organization:</b> Summerland Museum and Archives Society</p> <p>PO Box 1491, 9521 Wharton St.</p> <p>Summerland B.C.</p> <p>V0H 1Z0</p> <p>Tel: 250.494.9395</p> <p>E-mail: archives@summerlandmuseum.org</p> <p>Contact Person &amp; Title:</p>	<p><b>Receiving Organization:</b></p>
---	---------------------------------------

**Description of Records:**

**Reason for Transfer:**

**Comments:**

The Summerland Museum and Archives Society relinquishes all rights and responsibilities of said property including the physical care and all associated documentation. The recipient of the transferred items may dispose of them in an appropriate manner if they do not conform to their institution's collection acquisition policy.

**SUMMERLAND MUSEUM AND ARCHIVES SOCIETY:**

\_\_\_\_\_  
Name of Transmitting Representative (Please print)      Signature      Date

**NAME OF RECEIVING ORGANIZATION:**

\_\_\_\_\_  
Name of Receiving Representative (Please print)      Signature      Date



Summerland Museum & Archives Society  
DEACCESSION RECOMMENDATION

PO Box 1491, Summerland B.C. V0H 1Z0  
P. 250.494.9395 E.info@summerlandmuseum.org  
www.summerlandmuseum.org

Category: Archives Artifacts Library Photos Date: \_\_\_\_\_

Submitted by: \_\_\_\_\_  
(Name and title)

Accession Number: \_\_\_\_\_ Donor's Name: \_\_\_\_\_

Method of Acquisition: \_\_\_\_\_

Object Name/Description: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Current Condition: Excellent Good Fair Poor

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Documentation: Yes No (if no, why not? \_\_\_\_\_)

Attachments:

- Donor Form Condition Report  
Photograph Catalogue Record  
Other: \_\_\_\_\_

Deaccessioning Criteria:

1. The Museum fully and legally owns the archival material(s), artifact(s), library material(s), or photograph(s). Yes No
2. The archival material(s), artifact(s), library material(s), or photograph(s) has been accessioned into the Museum's collection. Yes No
3. Meet at least one of the following:
  - a. The object is deteriorated in condition beyond any useful function for exhibition, research, study, or other purpose. Yes No
  - b. The object is not relevant to the objectives and purposes of the SMAS and does not meet the collection criteria (3.4.1 of Policy Manual). Yes No
  - c. The object is more relevant to another institution's collection. Yes No
  - d. The object is an unidentifiable piece or fragment. Yes No
  - e. The object is unwieldy or of a large size, and the amount of storage space required exceeds the object's historical value or pertinence. Yes No
  - f. The object is a duplicate with lesser provenance or documentation. Yes No
  - g. The object is being repatriated. Yes No
  - h. The object is determined not to be authentic. Yes No
  - i. The object is subject to restrictions which limit the object's use. Yes No
  - j. The object requires specialized storage facilities or conservation care which SMAS cannot provide. Yes No
  - k. The object has a serious lack of documentation (provenance), nor known local connection. Yes No
  - l. The object is a threat to any of the following: the collection, visitors, or staff. Yes No

4. Other Criteria: \_\_\_\_\_

---

**Recommended Disposition:**

- Transfer to Education Collection
- Offered to another non-profit institution
- Intentional destruction of damaged or hazardous object
- Sold with proceeds going to care of SMAS collections
- Disposal if no other option or item is in such poor condition it cannot be transferred or sold

---

**APPROVAL:**

*Curator or Archives Registrar:*       Approved     Not Approved      Date: \_\_\_\_\_

Reason for non-approval: \_\_\_\_\_

Other comments: \_\_\_\_\_

Signature: \_\_\_\_\_

*Collections Committees:*       Approved     Not Approved      Date: \_\_\_\_\_

Reason for non-approval \_\_\_\_\_

Other comments: \_\_\_\_\_

Signatures (at least three signatures are needed for a Collections Committee majority vote):

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Name)

---

**Final Disposition of Object:**

Disposition type: \_\_\_\_\_ Date: \_\_\_\_\_

Done by and witnesses (if necessary): \_\_\_\_\_

**Summerland Museum & Archives Society**  
**AGREEMENT OF OUTGOING**  
**LOAN**

PO Box 1491, 9521 Wharton St. Summerland B.C. V0H 1Z0  
250.494.9395 [info@summerlandmuseum.org](mailto:info@summerlandmuseum.org)  
[www.summerlandmuseum.org](http://www.summerlandmuseum.org)

**INSTRUCTIONS**

This *Agreement of Outgoing Loan* is entered into by the Summerland Museum and Archives and the Borrower, subject to the *Terms and Conditions Governing Loan Agreement*.

**BORROWER**

Borrower Name: \_\_\_\_\_ Loan Period: \_\_\_\_\_ to \_\_\_\_\_

Address: \_\_\_\_\_

Purpose of Loan: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

The Borrower will credit the Museum using the credit line: \_\_\_\_\_

**LENDER**

The Summerland Museum and Archives agrees to loan the Object(s) described for the Loan Period above.

Museum Contact: Stephanie Normandeau

Email: archives@summerlandmuseum.org

Phone: (250) 494-9395

**LOANED OBJECT(S) DESCRIPTION**

Accession #	Description of loaned items

**SIGNATURES**

Signature of Borrower \_\_\_\_\_ Print Name & Title \_\_\_\_\_ Date \_\_\_\_\_

Signature of Museum Representative \_\_\_\_\_ Print Name & Title \_\_\_\_\_ Date \_\_\_\_\_

**TERMS AND CONDITIONS GOVERNING LOAN AGREEMENT**

1. This "Terms and Conditions Governing Loan Agreement" and the attached "Agreement of Outgoing Loan" (collectively the "Agreement") set forth the terms and conditions to which the Summerland Museum and Archives (the "Museum") will lend the objects (the "Loaned Object(s)") to the Borrower.
2. The Loaned Object(s) shall remain the property of the Summerland Museum and Archives.
3. The Borrower agrees that the Loaned Object(s) shall be returned to the Museum in the same condition as existed when they were borrowed.
4. The Borrower acknowledges and agrees to accept full responsibility for the Loaned Object(s) and their safe return to the Museum.
5. The Borrower shall keep and protect the Loaned Object(s) fully from theft, damage, destruction, or alteration, howsoever caused, for the entire period of the loan and until such time as the Loaned Object(s) are returned to the care and control of the Summerland Museum and Archives.
6. The Borrower will advise the Museum without undue delay of any damage, loss or theft.
7. The Borrower shall not glue, pin, punch, drill, tape, nail, tack, or otherwise violate the integrity of the Loaned Object(s). The Borrower shall not clean, repair, or otherwise alter the Loaned Object(s), but shall immediately report the need for such action to the Museum. The Museum may, at its sole discretion, provide written authorization for the Borrower to perform such cleaning or treatments.
8. The Borrower agrees that all packing and shipping shall be the sole responsibility of the Borrower. The Borrower further agrees that all shipping, handling, storage and display of the Loaned Object(s) shall be in strict accordance with the Museum's standards.
9. The Borrower shall at all times ensure that attribution is provided to the Museum as the source of the Loaned Object(s) when it is placed on display, further providing acknowledgement of authors and photographers as applicable.
10. The Borrower acknowledges and agrees that all rights and title to the Loaned Object(s), including but not limited to copyright, remain with the Museum, and that the Borrower shall not copy or cause to have copied the Loaned Object(s) in whole or in part without the prior written consent by the Museum.
11. The Agreement shall be terminated immediately upon the breach of any condition of the Agreement by the Borrower. The Museum may otherwise terminate the Agreement without cause on providing one month's written notice to the Borrower.
12. The Borrower agrees to comply with all laws of the Province of British Columbia and Canada.
13. This Agreement constitutes the entire agreement between the parties regarding the Loaned Object(s). No oral understanding or agreement not incorporated herein will be binding on either party. In the event of any conflict between this Agreement and any other writings, forms, or documents, the terms and conditions set forth in this agreement shall supersede and control. The Museum and the Borrower acknowledge and agree that this Agreement, and the terms and conditions set forth, may not be altered, changed, waived, or otherwise amended except as agreed upon in a writing signed by an authorized representative of each party.
14. Each party's signature on the "Agreement of Outgoing Loan" indicates that each party acknowledges and accepts the terms and conditions set forth in this Agreement.

**SIGNATURES WHEN RETURN**

\_\_\_\_\_  
Signature of Borrower

\_\_\_\_\_  
Print Name & Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Museum Representative

\_\_\_\_\_  
Print Name & Title

\_\_\_\_\_  
Date



Summerland Museum & Archives Society  
AGREEMENT AND CERTIFICATE OF INCOMING LOAN

PO Box 1491, 9521 Wharton St. Summerland B.C. V0H 1Z0  
250.494.9395 info@summerlandmuseum.org  
www.summerlandmuseum.org

**INSTRUCTIONS**

This *Agreement and Certificate of Incoming Loan* is entered into by the Summerland Museum and Archives and the Lender, subject to the *Terms and Conditions Governing Loan Agreement*.

**BORROWER**

The Summerland Museum and Archives agrees that the Loaned Object(s) will be used for the purpose of:

Exhibition Name: \_\_\_\_\_ Loan Period: \_\_\_\_\_ to \_\_\_\_\_

Museum Contact: \_\_\_\_\_ Email: \_\_\_\_\_ Ph: (250) 494-9395

**LENDER**

Lender's Name:

\_\_\_\_\_

Address:

\_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

I agree to public acknowledgement \_\_\_\_\_ OR I wish to remain anonymous as the donor \_\_\_\_\_

The Museum will credit the Lender using the credit line: \_\_\_\_\_

**LOANED OBJECT(S) DESCRIPTION**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you own the copyright to the work (Y of N): \_\_\_\_\_ If not, who does: \_\_\_\_\_

Condition: \_\_\_\_\_

**SIGNATURES**

The undersigned agree to the *Agreement and Certificate of Incoming Loan* and to the *Terms and Conditions Governing Loan Agreement*.

\_\_\_\_\_  
Signature of Lender

\_\_\_\_\_  
Print Name & Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Museum Representative

\_\_\_\_\_  
Print Name & Title

\_\_\_\_\_  
Date

**TERMS AND CONDITIONS GOVERNING LOAN AGREEMENT**

1. This "Terms and Conditions Governing Loan Agreement" and the attached "Agreement and Certificate of Incoming Loan" (collectively the "Agreement") set forth the terms and conditions to which the Lender will lend and the Summerland Museum and Archives (the "Museum") will borrow the objects loaned by the Lender (the "Loaned Objects").
2. The Loaned Object(s) shall remain the property of the Lender.
3. The Museum will exercise the same standard of care for the Loaned Object(s) lent under this Agreement as applied by the Museum to any other comparable objects owned or cared for by the Museum.
4. The Lender will inform the Museum in writing of a change of details, including but not limited to change of name or address. The Museum shall return the Loaned Objects to the Lender within 60 days after the end of the Loan Period to the address provided unless otherwise notified by the Lender in writing. If the Museum is unable to return any items due to an improper address or the unavailability of the Lender, the Museum shall have no further liability for the Loaned Objects 90 days after the end of the Loan Period, and this Agreement shall be terminated. The Lender acknowledges that the Museum may dispose of the Loaned Objects in any manner it determines should such termination occur.
5. This agreement may be terminated by either party on providing one month's written notice to the other party.
6. Unless the Lender notifies the Museum in writing to the contrary, it is understood that the Loaned Object(s) may be photographed by the general public.
7. The Museum shall have the right to make photographs or otherwise copy the Loaned Object(s) for publication, educational, or publicity purposes connected with the purpose of the Loan. Any copy of the Loaned Object(s) made under this Agreement is the property of the Museum.
8. The Museum will ensure that the object(s) are maintained in a suitable condition for display. Dusting may be carried out but no repairs, conservation, or extensive cleaning will be undertaken without written prior consent of the Lender.
9. The Museum will advise the Lender without undue delay of any damage, loss or theft.
10. The Lender is responsible for transit costs and for damage or loss to the Loaned Object(s) to and from the Museum.
11. The Lender acknowledges that under no circumstances shall the Museum be liable for damage, loss or destruction, or theft of any of the Loaned Object(s), no matter how caused. The Lender acknowledges that insurance for the Loaned Object(s) is the responsibility of the Lender, and that failure to obtain such insurance for the entire Loan Period releases the Museum from liability for loss or damage.
12. If the legal ownership of a Loaned Object changes while the Loaned Object is under the Museum's care, the Lender must notify the Museum of this change of ownership.
13. The Lender acknowledges and agrees that the Museum has the sole discretion, for the duration of the Loan Period, to determine the duration for which, and the manner in which, the Loaned Object(s) may be exhibited and to determine which written and interpretive materials will accompany the Loaned Object(s) at the exhibition. The Lender further acknowledges and agrees that the Museum has the sole discretion to determine whether to exhibit the Loaned Object(s) and that the Museum is not obligated to exhibit or display the Loaned Object(s).
14. This Agreement constitutes the entire agreement between the parties regarding the Loaned Object(s). No oral understanding or agreement not incorporated herein will be binding on either party. In the event of any conflict between this Agreement and any other writings, forms, or documents, the terms and conditions set forth in this agreement shall supersede and control. The Museum and the Lender acknowledge and agree that this Agreement, and the terms and conditions set forth, may not be altered, changed, waived, or otherwise amended except as agreed upon in a writing signed by an authorized representative of each party.
15. The Lender warrants that the Lender has complied with all laws of the Province of British Columbia and Canada and applicable international conventions and treaties in relation to the Loaned Object(s).
16. Each party's signature on the "Agreement and Certificate of Incoming Loan" indicates that each party acknowledges and accepts the terms and conditions set forth in this Agreement.

**SIGNATURES WHEN RETURN**

_____	_____	_____
Signature of Lender	Print Name & Title	Date
_____	_____	_____
Signature of Museum Representative	Print Name & Title	Date



## Summerland Museum & Archives Society RESEARCH AREA RULES

PO Box 1491, 9521 Wharton St. Summerland B.C. V0H 1Z0  
250.494.9395 [info@summerlandmuseum.org](mailto:info@summerlandmuseum.org)  
[www.summerlandmuseum.org](http://www.summerlandmuseum.org)

### INTRODUCTION

The Summerland Museum and Archives Society (SMAS) is dedicated to providing access to its collections while ensuring their long term protection as a valuable resource for study. All researchers are required to follow the rules outlined below. Failure to abide by these rules will result in that researcher being asked to leave.

### RULES

- Researchers must leave coats, briefcases, and personal items at the front desk/foyer.
- Food, drink, and ink pens are not permitted in the Research Area.
- SMAS may restrict the use of some records because of fragility or proprietary rights.
- The use of personal computers and cameras is allowed as long as they do not harm the records or disturb other researchers.
- Photocopying is done by staff only. The Summerland Museum and Archives reserves the right to refuse to photocopy records deemed too fragile. Fees are \$0.50 per page.
- Please maintain the order of all documents within folders and folders within boxes.
- Researchers are responsible for the correct citation of records. If publishing material from the archives, please credit the Summerland Museum and Archives Society.
- Determination of copyright status or details is entirely the responsibility of the user. The Summerland Museum and Archives is in no way responsible for determining, or advising on, matters of copyright.

### GUIDELINES FOR HANDLING COLLECTIONS

- **Please ensure your hands are clean.**
- All material in cartons or boxes should be kept in the order received. Remove one folder at a time.
- **Use a pencil to take notes.** Pens or markers of any kind are not permitted in the Research Area.
- No marks should be added or erased from Archival material.
- Do not rest anything on top of manuscripts or printed items.
- Handle paper documents and book leaves as little as possible, turn pages gently and one at a time.
- Gloves will be provided for material that is particularly sensitive to handling, including original photographs and negatives.
- Objects in the collection may not be handled by the public except with direct and explicit permission from qualified Museum staff.

# Summerland Museum & Archives Society

P.O. Box 1491, Summerland, BC V0H 1Z0 Tel: 250-494-9395  
www.summerlandmuseum.org archives@summerlandmuseum.org



## FEEES FOR ARCHIVES SERVICES

Fees include one-time use of Archives collection items in a publication, on a website, as decoration. Any additional use of the items requires the permission of the Summerland Museum and Archives Society, and is subject to payment of an additional fee. Credit must be given to Summerland Museum and Archives Society as the source of the items.

### Staff Research Time per hour

25\$\*

*\*Applies to specific projects*

### Shipping

The Museum applies a fee in order to cover shipping cost. |  
This cost may vary according to the size of the sending.

### PHOTOGRAPHIC REPRODUCTIONS

Digital Image Files from photographs  
*Sent by e-mail if file size permits*

600 dpi      \$15.00 each image

### OTHER COPIES

Digital Scans of Records  
e.g. Archival records, fragile papers  
*Sent by e-mail if file size permits*

600 dpi      \$15.00 each item/page

Photocopies/Printouts  
50¢/page

\*Additional fees are required if the reproduction is to appear as a frontispiece, advertisement, chapter divider, book cover, dust jacket.  
35\$

# Research Request Form



Name: _____		Date: _____	
Address: _____		City: _____	Prov: _____ code: _____
Phone: _____		Email: _____	
Nature of Research: (circle one)			
Academic		Publication	
Reproduction		Genealogy	
Personal Interest			
<b>Request Details: (please be specific)</b>    			
*Photocopies # _____		*Photographic reproductions # _____ (Scans, prints)	
*The Museum applies a fee or requests a donation in order to cover material costs, research time and upkeep to the collection.			
<u>Description of items or files copied:</u> (Use back of form if required)    			
<b><u>Office Use Only:</u></b>			
Date to Access Archives: _____			
Staff Completing Research: _____		Time required for Research: _____	
Staff assisting research: _____		Time required for Assistance: _____	
Date Completed: _____		Total Charge (incl. copies, etc.) <input type="text"/>	
Date Items Picked Up: _____			
Signature of Recipient: _____		Staff Signature: _____	

## FEES FOR ARCHIVES SERVICES

Fees include one-time use of Archives collection items in a publication, on a website, as decoration. Any additional use of the items requires the permission of the Summerland Museum and Archives Society, and is subject to payment of an additional fee. Credit must be given to Summerland Museum and Archives Society as the source of the items.

### Staff Research Time per hour

25\$\*

*\*Applies to specific projects*

### Shipping

The Museum applies a fee in order to cover shipping cost. This cost may vary according to the size of the sending.

### PHOTOGRAPHIC REPRODUCTIONS

Digital Image Files from photographs  
*Sent by e-mail if file size permits*

600 dpi      \$15.00 each

### OTHER COPIES

Digital Scans of Records  
*Sent by e-mail if file size permits*

600 dpi      \$15.00 each item/page

Photocopies/Printouts  
50¢/page



**Summerland Museum & Archives Society  
PERMISSION TO USE ARCHIVAL MATERIAL  
REPRODUCTIONS**

PO Box 1491, 9521 Wharton St. Summerland B.C. V0H 1Z0  
250.484.9395 info@summerlandmuseum.org  
www.summerlandmuseum.org

Non-Exclusive License for Use

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Phone: \_\_\_\_\_

City: \_\_\_\_\_ st: \_\_\_\_\_ Postal code: \_\_\_\_\_

Email: \_\_\_\_\_

Is hereby granted a non-exclusive license to reproduce or display archival material or photographic images derived from the Summerland Museum and Archives Society's Archive collections, as listed on attached sheet, for use in exhibition, resale, reproduction or other agreed upon use, in the following manner:

Title of Publication/Display/Film/etc: \_\_\_\_\_

Location: \_\_\_\_\_

Dates of use: \_\_\_\_\_

How to be used:

**Accession Numbers of Photos Used:**


**Please read the following guidelines carefully:**

I/We hereby agree to the following conditions which shall constitute the terms of this non-exclusive license:

1. Reproductions: The Museum will not allow any image or archival material to be removed from its collections for copying or reproduction by any private party or individual. All document reproductions, copy negative and photographic reproduction will be handled as specified by the Museum.
2. One Time Use: Written permission must be secured from the Museum to exhibit, resale, publish or reproduce in any form any archival material or photographic images that are obtained directly or indirectly from the Museum. Permission may be granted for one-time mutually agreed upon use only. Additional permission is required if the reproduction is to appear as a frontispiece, advertisement, chapter divider, book cover, dust jacket, individual reproduction or is not referred to directly in the text of a book in which the image is used. In such cases, additional fees (as outlined in the fee schedule) will be required and all other terms herein are applicable. All other rights, including those of further reproduction or publication, are reserved in full by the Museum.
3. Credit Line: Publication or display of any archival material or images shall include credit to the Museum, and shall read: **"(Item #) Courtesy of the Summerland Museum and Archives Society, Summerland, B.C."** In terms of styles of publications, the credit line will follow these specifications:

- a. With printed matter, it is preferred that the credit line appear on the same or facing page as the illustration or with other "sources of illustrations." Crediting of each individual archival item or image is necessary in all cases.
- b. With films, filmstrips, video, and PowerPoint presentation use, include the credit with other "sources of illustrations." In manuals that accompany filmstrips, give credit at the point where the illustration is discussed.
- c. With displays and exhibitions, show credit with "Sources."

4. Copy to the Museum: Researchers, authors, publishers, advertisers, film/video producers and anyone else using reproduction material in any format from the Museum, shall furnish free of charge to the Museum, one copy of the finished product, and color photographs of any exhibitions in which any material from the Museum may appear.

5. Alterations: All efforts should be made to make reproductions as faithful and accurate as possible. Alteration in reproductions of archival material or photographs are subject to prior review and/or approval by the Museum. All reproductions, in any form, produced directly or indirectly from images or archive material acquired through the Museum are bound under the original agreement under which the original material or images were obtained.

6. Subcontracts: The Museum gives no exclusive rights to any publisher, author, or photographer, and assumes no responsibility for duplication of subjects by others and no responsibility for claims by third parties. All subcontracts regarding the reproduction of archival material or images pursuant to this non-exclusive license shall incorporate this agreement and all of its terms shall be applicable. No subcontracts may be entered for the purpose of reproducing archival material or images without the express consent of the Museum.

The Summerland Museum and Archives Society is a non-profit organization. Thank you for your interest in the heritage of the Columbia Pacific region.

\* \* \* \* \*

I/We have read and agree to the above listed stipulations concerning use of archival material or photographic reproductions in the collections of the Summerland Museum and Archives society.

Signature: \_\_\_\_\_

Name (Please print): \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
 Museum Representative: \_\_\_\_\_

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

Date: \_\_\_\_\_



**Summerland Museum & Archives Society  
VOLUNTEER APPLICATION**

PO Box 1491, 9531 Wharton St. Summerland B.C. V0H 1Z0  
250.424.9395 info@summerlandmuseum.org  
www.summerlandmuseum.org

**INSTRUCTIONS**

Thank you so much for your interest in volunteering at the Summerland Museum and Archives Society. Tell us more about yourself and your interests so we can find the right volunteer position for you.

**CONTACT INFORMATION**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
(Town/City) (Province) (Postal Code)

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Emergency Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**EXPERIENCE**

Please describe any related work or volunteer experience that might help you as you volunteer. Include any experience from work, volunteering, hobbies, interests etc. (attach pages if needed)

Why are you interested in volunteering at the Summerland Museum and Archives Society? What do you hope to get out of the experience?

**REFERENCE**

Please provide the name and contact information for two references:

1) Name: \_\_\_\_\_ Phone: \_\_\_\_\_

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

2) Name: \_\_\_\_\_ Phone: \_\_\_\_\_

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

**AVAILABILITY**

What is your availability?  
(Check all appropriate boxes)

	Morning	Afternoon	Not Available
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			

What time of the year are you available? (Check all that apply)

- All Year     Spring     Fall  
 Summer     Winter

How often would you like to volunteer?

- Weekly     Monthly  
 Bi-Weekly     Occasionally

**AREAS OF INTEREST**

Please indicate your area(s) of interest. Check all that apply:

- Museum Greeter/Guide/Docent
  - Greet visitors, answer questions, tidy public area, and provide information about the Museum and the history of the area.
- Archive Research
  - Assist with community research requests, help our archivist with cataloguing, storing, and organizing our artifacts and archival collection.
- Administrative Assistant
  - Assist with projects in the behind-the-scenes operation of the Museum, including grant writing, developing brochures, record keeping, etc.
- Website / Social Media
  - Promote the Museum and our activities online through the website and social media.
- Fundraising/Marketing/Special Events
  - Use your creativity to help plan and organize fundraising events, marketing, and promotion of the Museum.
- Exhibition Assistant
  - Assist with the creation of new displays including research, design, construction, and set up.
- Oral History
  - Assist in collecting and transcribing oral histories.
- School Education Tours |
  - Assist with the development and delivery of school programs.
- Heritage Interpreter/Tours
  - Assist with the development and delivery of community tours. Specify area of interest:  
\_\_\_\_\_
- Other / Unsure: Specify  
\_\_\_\_\_
  - Let us know what you have to offer, or feel free to sit down and talk with our Volunteer Coordinator to discuss your options.



**Summerland Museum & Archives Society  
PRIVACY & CONFIDENTIALITY FORM**

PO Box 1491, 2521 Wharton St. Summerland B.C. V0H 1Z0  
250.494.9325 info@summerlandmuseum.org  
www.summerlandmuseum.org

**CONFIDENTIALITY POLICY**

It is the policy of the Summerland Museum and Archives that board members, employees, and volunteers of the Museum will not disclose confidential information belonging to, or obtained through their affiliation with the Summerland Museum and Archives to any person, including their relatives, friends, and business and professional associates, unless the Museum has authorized disclosure. Such information must be kept confidential both during and after employment or volunteer service. This policy is not intended to prevent disclosure where disclosure is required by law.

All information concerning our clients, donors, members, staff, and volunteers, as well as financial data and business records of The Summerland Museum and Archives is confidential. "Confidential" means that you are free to talk about The Summerland Museum and about your position, but you are not permitted to discuss or disclose personal and financial information with anyone without permission or appropriate authorization. Board members, volunteers, and employees are cautioned to demonstrate professionalism, good judgement, and care to avoid unauthorized or inadvertent disclosures or confidential information and should, for example, refrain from leaving confidential information contained in documents or on computer screen in plain view.

Upon separation of employment or expiration of service at the Summerland Museum, any materials containing privileged or confidential information must be returned.

Unauthorized disclosure of confidential or privileged information is a serious violation of policy, and will subject the person who made the unauthorized disclosure to appropriate discipline, including removal/dismissal from service at the Summerland Museum and Archives, removal from the Museum's membership, and legal action.

**SIGNATURE**

I certify that I have read the Summerland Museum and Archives' policy on confidentiality presented above. I agree to abide by the requirements of the policy and inform my supervisor immediately if I believe any violation (unintentional or otherwise) of the policy has occurred. I understand that violation of this policy will lead to disciplinary action.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

# SUMMERLAND MUSEUM AND ARCHIVES SOCIETY

## MEMBERSHIP APPLICATION

\*Event discounts and special invitations to exhibit openings and events

\*Free access to the archives, research facility, and ancestry.com by appointment

\*Receive seasonal newsletters and voting privileges at the AGM

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

Postal Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

New  Renewal

If renewal, has your contact info changed?

Yes  No

### Annual Fee Schedule

- Senior (60+) \$12.00
- Adult (18-59) \$18.00
- Individual Life \$100.00
- Corporate-Bronze \$100.00
- Corporate-Silver \$200.00
- Corporate-Gold \$300.00

*(All Corporate and Life Memberships receive a free mug).*

## COMMUNICATIONS

Send newsletter and Annual General Meeting materials via  Mail  Email

I consent to being contacted by email regarding:

Volunteer Opportunities:  Yes  No

Museum Activities:  Yes  No

Signature: \_\_\_\_\_

All memberships are prorated to end on April 30. You only pay for the months remaining in the year before your first renewal. Official tax receipts issued for donations \$25.00 and over. Please make cheques available to Summerland Museum and Archives Society.

PO BOX 1491, SUMMERLAND, BC, V0H 1Z0

info@summerlandmuseum.org

250.494.9395

www.summerlandmuseum.org



Summerland Museum & Archives Society  
**WORKPLACE BULLYING AND HARASSMENT  
INVESTIGATION FORM**

PO Box 1481, 9521 Wharton St. Summerland B.C. V0H 1Z0  
250.494.9395 info@summerlandmuseum.org  
www.summerlandmuseum.org

COMPLETED BY THE  
INVESTIGATOR

**INVESTIGATOR INFORMATION**

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Date: \_\_\_\_\_

**DOCUMENT REVIEW**

List all documentation reviewed (emails, notes, photographs, physical evidence, etc.)

**INTERVIEWS (ATTACH ADDITIONAL SHEETS AS NEEDED)**

Person Interviews (Name, Position): \_\_\_\_\_

Situation Description (include dates, words, actions), and impact (humiliated, intimidated, etc.)

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Person Interviews (Name, Position): \_\_\_\_\_

Situation Description (include dates, words, actions), and impact (humiliated, intimidated, etc.)

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**OUTCOMES**

Based on the investigation, did workplace bullying and harassment occur? Yes No

Reason(s) for this conclusion: \_\_\_\_\_

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Follow up with complainant/respondent. Include corrective actions, time frame, training opportunities, etc.

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