



Summerland Museum & Archives Society

Collections Policy Manual

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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

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.

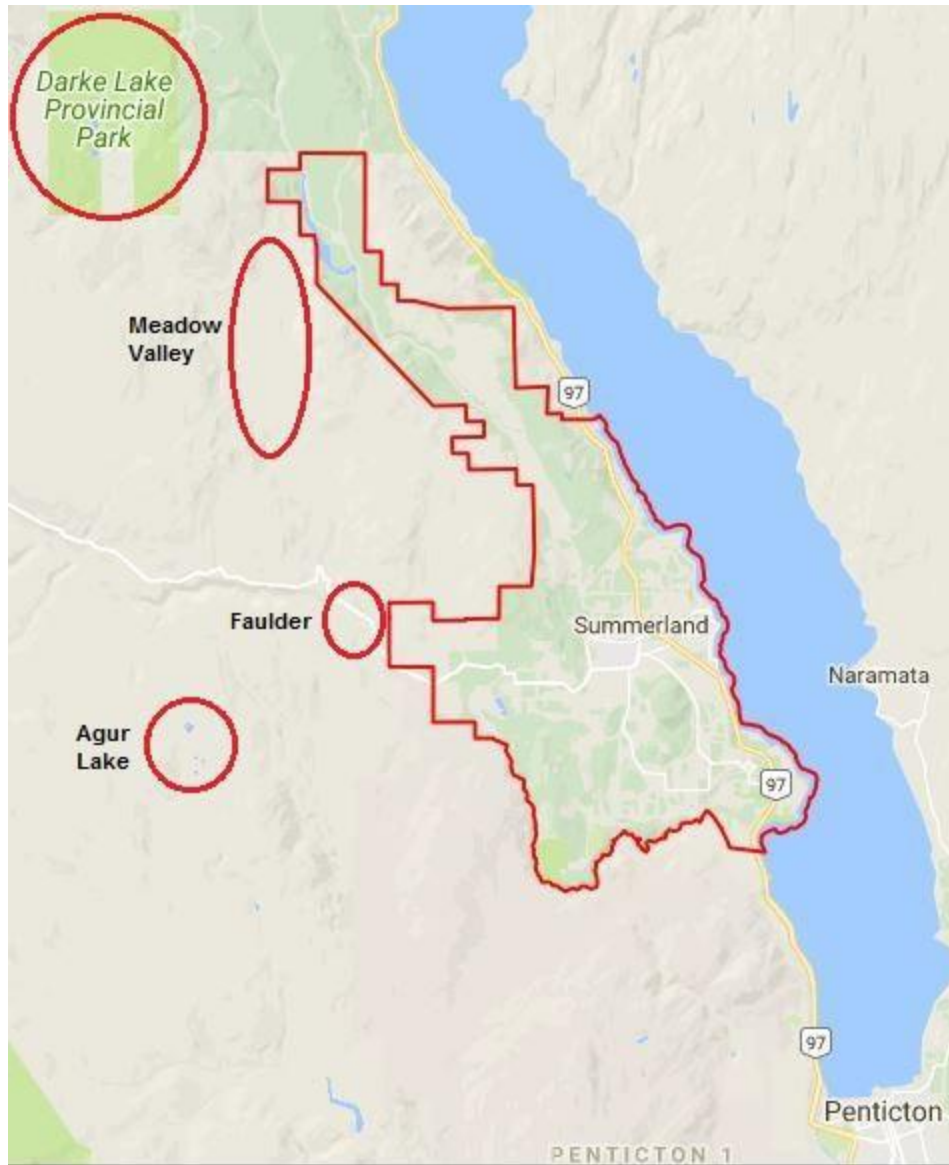


Figure 1: Summerland District Boundaries with adjacent locations marked.

2.3 Scope and Limits of Collections

The collections at SMAS encompass historic artifacts (including objects, documents, photographs, artworks, etc.) 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 per [3.4.1. Collections Criteria](#).

2.5 Governance

The Summerland Museum and Archives Society Board of Directors with specific Policies and Objectives which have been adopted governs the Summerland Museum and Archives. The implementation of Board and Staff developed policies and daily operation of the Museum and Archives is the responsibility of the Curatorial, Archival, and Administrative staff.

B. Collections Management

3. Acquisitions and Accessions

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 Museum Staff to the best of their ability for as long as legal ownership is held by the Museum. 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 accepted procedure for acquisitions and accessions can be found in [D. Associated Documents](#) in the *Acquisition and Accession Procedure*.

3.2 Authority

Authority for acquisitions to the Summerland Museum and Archives rests with the Curatorial and Archival Staff, which has the mandate of the Board to accept and refuse objects on behalf of the Museum. When the Staff has a concern with the regard to the validity of a specific acquisition, they will refer the matter to the Board for advice.

In cases where the proposed acquisition is of particular importance to the Museum collections, but is of a contentious nature, would take special effort to properly care for, has a value greater than \$1000, or the conditions of the acquisition restrict the use of or the disposition of the object(s) by the Summerland Museum and Archives Society, 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 the Curatorial and Archival Staff who may refer the matter to the Board if necessary.

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 (permitting they meet the Collection Criteria) may be formally accessioned into the collection using the *Acquisition and Accession Procedure*. Objects that are not accessioned into the collection must follow the *Deaccession and Disposal Procedure*.

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. If an object is accepted into the collection it is to be formally accessioned into the collection following the *Acquisition and Accession Procedure*. Abandoned objects will be treated as abandoned goods, and unless in extreme circumstances, those that are not accessioned into the collection will be disposed of, following the *Deaccession and Disposal Procedure*. The Museum bears no legal or moral obligation to accept or care for abandoned objects.

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.
- Any objects definitely or likely recovered from an archeological site must have a documented provenance pre-dating 1970.¹
- 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.

¹ 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.
- An accession record will be completed by the Staff for each lot of objects acquired.
- Any recommendations from the Staff, supported by the Board where necessary, summarizing the decision to acquire or refuse the object.
- On acceptance, the signed donor form copy, and a letter of acknowledgement will be emailed 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 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.

3.7 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
 - 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 in the collections are subject to the *Deaccession and Disposal Procedure* found in [D. Associated Documents](#) and, will not otherwise be, sold, traded, or 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

Removal of an object from the collection may be initiated on the recorded written recommendation of a qualified staff member. The staff member may seek advice from the Board as required. Documentation of decisions and recommendations will be made in all stages.

4.3 Deaccessioning Criteria

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 Documentation

All documentation pertaining to an item that has been deaccessioned will be kept in perpetuity, as part of the *Deaccession Recommendation* found in [D. Associated Documents](#) 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. The Summerland Museum does not accept loans for the purpose of storage.

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 trained staff, and given the special circumstances of repatriation requests, staff will prepare a report on the request for submission to the Board of Directors for review and 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 retained in accordance with the Summerland Museum and Archives Society Document Retention Policy.

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 minimize the reduction of public benefit caused by deterioration or damage to the collection. 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, therefore Staff will act with discretion when using artifacts for the latter.

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 subject to any limitations of the Museum facility as provided by the District of Summerland.
- 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 improper housekeeping practices, vandalism, or theft.
- The Museum will establish procedures and provide support for protection of the collection from environmental damage or loss in conjunction with the District of Summerland as Owners of the building.

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 considered 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. Given that the Summerland Museum facility and partial funding for its operations are provided by the District of Summerland, the Museum is responsible for serving the needs and expectations of both residents and visitors alike. 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 Authority

The selection, development and display of all exhibitions in the Summerland Museum & Archives both on and off-site is under the sole authority of curatorial and archival staff members.

9.3 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.

9.4 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 permanent collection as possible.

9.5 Development

- All Permanent, Temporary and Guest 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.
- The term “Guest Curator” will apply to a special interest or community group or individual who may develop exhibitions. The terms and condition of the Guest Exhibits will be in accordance with the Summerland Museum and Archives Society *Guest Exhibit Policy* and the terms of a written contract between and with the Guest Curator and the Summerland Museum and Archives as provided in the *Guest Exhibit Policy*.
- 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. Definitions

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.

Authority: The person or persons with the delegated right to make decisions and/or take actions concerning a matter.

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.

D. Associated Documents

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. Acquisition and Accession Procedure
7. Deaccession and Disposal Procedure
8. Agreement of Outgoing Loan
9. Agreement and Certificate of Incoming Loan
10. Research Area Rules
11. Fees for Archives Services
12. Research Request Form
13. Permission to Use Archival Material Reproductions

Deed of Gift Agreement

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



Received from:

Name	Phone number
Address	Email

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

Accession number: Artifacts:	Photos:
Object names:	
Specific History (made for whom, used in what situations):	
Owner History (how it came into your possession, who owned it previously, etc.):	
Condition: Good	
Restriction:	

I/ve, 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:		
Transfer to another institution	Sold for fundraising	Dispose of

(Donor to initial)

Implemented September 2016

Summerland Museum & Archives Society

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

Donation received:	
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

Summerland Museum & Archives Society
ORAL HISTORY RELEASE AGREEMENT

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

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:

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

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:  _____

Final Disposition of Object:

Disposition type: _____ Date: _____

Done by and witnesses (if necessary): _____



ACQUISITION AND ACCESSION PROCEDURE

This is the procedure to follow when items are offered or considered for the museum's collection. An acquisition is defined by the transfer of title of an object from a donor to the museum. Accessioning is the formal process of entering items into the collection. At every step of the accessioning process, it is important to gather as much information about the object as possible and complete each document fully and to the best of one's ability.

1. Acquisition Procedure

1.1 Receiving Objects

Ideally, prospective donors will make an appointment for the Curator or Archivist to make time to properly review the objects being offered. As this is not always the case, if a prospective donor drops-in with items they would like to donate it is best to either suggest another scheduled time to look over the objects or fill out a Temporary Acceptance Form. The Temporary Acceptance Form does not transfer legal ownership to the Summerland Museum. It has an agreed upon date when the items must either be returned to the owner or accepted into the museum's collection.

Refer to the Collection Criteria section of the Collections Policy Manual when considering new acquisitions.

1.2 Gift Agreement Form

When objects are accepted into the museum's collection, a staff member must create an accompanying Gift Agreement. This must be done while the donor is present to capture the most information about the object as possible. The Gift Agreement transfers legal ownership from the donor to the Summerland Museum. Have the donor sign the Gift Agreement, enter their contact information, and mark their preferred disposition.

Useful questions to ask a donor when filling a Gift Agreement are:

- What is the relevance of this item to Summerland?
- How old is this object?
- Who originally owned/ made this object?
- How did you come to own this object?

2. Accession Procedure

2.1 Completion of Accession Record

The Accession Record is a detailed documentation of the donation you are receiving. It captures the important information in the accession process. It keeps a record of the objects entering the collection, including but not limited to, a description of the object, the object's condition, and the object's provenance. Scan the completed Accession Record and Gift Agreement to put on the E: Drive and file the originals in their associated binders. It will sometimes be necessary to research the object to gain more information for its record.

2.2 Numbering the Artifacts

The Accession Number of an artifact is a number unique to a single object in the museum. The current system of numbering used by the Summerland Museum uses the year of the accession followed by the number of the accession, and the item number. For example, artifacts accessioned in the first accession of 2020 would be: 2020-001-001, 2020-001-002, 2020-001-003...

FIC (Found in Collection) Artifacts follow a different system. All FIC Artifacts go under the same Accession number for a year, for example the first FIC Artifacts number would be 2020-000-001, and the next FIC Artifact that is accessioned would be 2020-000-002.

2.3 Labeling the Artifacts

2.3.1 Placing the Artifact Inside an Envelope

Documentary artifacts and photographs will be placed in an envelope. For photographs and especially fragile documentary artifacts place them in a plastic cover before placing them in the envelope. The envelope should have the accession number, description of the artifact, and donor written on the front upper-left corner in pencil.

These types of artifacts will have the accession number marked on the back-side bottom-right or bottom left corner in pencil. The accession number should be as small as possible while remaining legible. Refer to *1.3.3 Marking the Number on the Artifact* for best practices when using pencil to mark accession numbers.

2.3.2 Tagging the Artifact

When possible, it is best to use acid-free tags and string to label artifacts.

The method for tagging an artifact is:

- (1) Write the number on an acid-free paper tag using a pencil
- (2) Pass acid-free cotton string through the hole in the label

- (3) Tie tape loosely round the 'hole', 'handle' or 'neck' of the object using a reef knot or by looping it round and through itself.
- (4) If you are not able to tie the label around the object, place it somewhere safe within or near the object. It should be clear that the tag is associated with the object.

2.3.3 Marking the Number on the Artifact

For artifacts that cannot have a tag you may apply the number on its surface. There are three methods to consider:

- (1) Applying a label to the surface:
 - Generally, not recommended as most labels are not stable long-term
- (2) Writing directly on the surface:
 - A soft pencil (#2 or HB) is recommended for marking the reverse of a paper object.
 - Write in an unimportant area and do not press hard enough to create indentations.
 - Plastic objects should have nothing applied to them.
- (3) Applying a barrier coat, then the number.
 - This method should only be performed when the correct materials and trained staff are available

There are some basic rules for applying labels and numbers to objects:

- (1) For objects made of more than one material, choose the least porous surface. (Metal, shell, glass or ceramic are better than wood or leather.)
- (2) Avoid numbering over paint or pigments.
- (3) **When in doubt, use a tag.**
- (4) Do not apply a stiff material to a flexible surface.
- (5) Disasters happen. Remember, barrier coats and labels will float off objects immersed in water. Use tags as a backup system.

2.4 Photographing the Artifact

When photographing artifacts refer to the Photographing Artifacts Procedure.

2.5 Entering the Artifact into the Database

From the information you collected while filling the Gift Agreement, Accession Record, and taking the artifact's photo, fill the related fields in the database to the best of your ability.

2.6 Donor Acknowledgment

If contact info has been provided, send the donor acknowledgement that the artifact has been entered into the collection.

References:

<https://www.collectioncare.org/numbering-museum-collections>

https://326gtd123dbk1xdkdm489u1q-wpengine.netdna-ssl.com/wp-content/uploads/2016/11/Labelling_and_Marking_booklet.pdf

<https://mitmuseum.mit.edu/services/acquisition-policies>

<https://collectionstrust.org.uk/resource/acquisition-and-accessioning-suggested-procedure/>



DEACCESSION AND DISPOSAL PROCEDURE

As part of our ongoing collections management, there may be situations where it is necessary to remove artifacts and archival documents from the collection. When deaccessioning, it is important to clearly demonstrate that the objects meet our criteria for deaccessioning, and that these procedures are followed to ensure that we are proceeding in an ethical manner. All deaccessions must be approved by qualified staff proceeding disposal.

All decisions to deaccession must be thoroughly documented and justified. The reasons must be ethical, defensible and objective.

Deaccession: The process by which an object is formally removed from the museum's permanent collection.

Disposal: The means by which the deaccessioned object is physically removed from the museum.

1. Deaccessioning Procedure

1.1 Review by Museum Staff

If an artifact is determined to meet one or more of the criteria listed in the Collections Policy, collections staff will review the paper and electronic records for the artifact to confirm that all documentation is accurate and complete. Incomplete records will be completed as much as possible before proceeding. If staff members are unsure of a decision, reach out to local museum workers as they might have handled a similar situation.

1.2 Completion of Deaccession Recommendation Document

The Deaccession Recommendation document is important in keeping a record of the deaccession, including but not limited to, the staff member making the recommendation, the object's condition at the time the recommendation is made, reasoning for deaccession, and recommended disposition. The Deaccession Recommendation must be signed for approval by the Curator or Archivist. Included with this document should be copies of the donor form, a photograph of the object, accession record, a condition report if necessary, and any other related documentation.

1.3 Deaccession

Update all related records to reflect the changed status of the object. Such records include the donor form, accession record, catalogue file (if the accession was made earlier than 2010), database record, and MASTER FILE record (for older accessions). If

the object came from a storage box, the outside (and if created, inside) labelling should be updated. If the object came from the RCMP basement storage, the RCMP Artifacts List should be updated. The accession number for the deaccessioned object should not be reused to avoid confusion in the future.

1.5 'Cooling Off' Period

Place the object in the 'Deaccessioned Items' area of the storage for a recommended 'cooling off period' of at least 3 months. This time is provided to allow any further information about the object to come to light, such as relevance, value, provenance, etc.

During this time, you may act on the recommended for method of disposal by contacting donors, other institutions, etc.

2. Disposal Procedure

2.1 Add to the Museum Disposal Record

Add the object into the excel file named Museum Disposal Record. It has columns for date of deaccession, date of disposal, photo of the object, and method of disposal.

2.2 Hierarchy of Disposal Methods

The following is a list of allowable disposition methods in preferential order:

1. The object will be considered for use in the Museum as part of the [Education Collection](#).
2. To the extent as which can be reasonably expected, the object will be offered to another non-profit institution or museum (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.
3. 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.
 - a) 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.
 - b) 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.

4. Low value objects may be donated to second hand or charity organizations for reuse or sale.
5. 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.

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
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 Objects") 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 or 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
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



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*

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Phone: _____		Email: _____	
Nature of Research: (circle one) Academic Reproduction Personal Interest		Publication Genealogy	
Request Details: (please be specific)			
*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)			
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Summerland Museum & Archives Society
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www.summerlandmuseum.org

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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: _____

