

# **Oliver and District Heritage Society**

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## **COLLECTIONS MANAGEMENT POLICY**

FINAL

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## **Oliver and District Heritage Society COLLECTIONS MANAGEMENT POLICY**

### **Forward**

The Oliver and District Heritage Society believes in an holistic and integrated approach to history keeping. While individual collecting areas such as archival materials, artifacts, buildings, special sites, works of art and archaeological material are, in and of themselves, invaluable, acquiring and managing them in isolation of the others deprives the community of knowing the whole story. Each collecting area supports what we know and can experience. They need to be managed together, not apart.

This policy guides current and future collecting activities. It provides a base on which we can responsibly manage our collections in a way that assures preservation, provides safe access to all that constitutes our collective heritage, and enables us to celebrate who we are. The Collections Management Policy establishes the policies and guides the procedures that govern acquisition, care, use and disposition of the collections.

To ensure currency and conformity with professional museum, archives, and built heritage standards, this policy will be reviewed every five years, and will be revised as needed to reflect changes within the organization or in policies and standards of the heritage profession.

## **I. INTRODUCTION**

The Oliver and District Heritage Society (hereinafter referred to as “ODHS”) is a not-for-profit charitable organization which operates both a museum and archives in the Town of Oliver. It also owns and/or supports the management of other heritage resources in the community on behalf of the citizens of Oliver and Okanagan Similkameen Regional District Area C, the Province of British Columbia, and Canada. Incorporated August 6, 1980 as the Oliver Heritage Society, the name changed in 1998 to reflect the support from the Regional District as well as the Town of Oliver.

The mission of the ODHS is: ***to identify, preserve, and promote the history and heritage of our community.*** The ODHS holds legal, fiscal, and ethical responsibility for the collections maintained by the Society.

The ODHS collects artifacts, archival materials, and other heritage resources pertaining to the human and natural history of the area represented by the following boundaries: south to Testalinda, west to Fairview and trading area, east to Camp McKinney and trading area, and north to White Lake and Okanagan Falls. The Society works collaboratively with neighbouring heritage organizations, including Osoyoos & District Museum and Archives, Okanagan Falls Heritage House and Museum, Penticton Museum and Archives, Covert Farms Agricultural Preservation Society, the Grist Mill at Keremeos, and the Keremeos Museum.

The ODHS receives financial support from: the Regional District of Okanagan Similkameen and the Town of Oliver (made possible through a 1996 referendum Bylaw No. 1702), members of the community, senior governments, and fundraising efforts.

The ODHS is governed by a Board of Directors and supported by staff. As public trustee, the Board acts on behalf of the community it has been entrusted to represent, and as stewards of the community’s resources, the Board approves and monitors compliance with this policy, completes periodic reviews and revisions of the policy, and approves accessions and deaccessions as required. The daily management and implementation of the policy is carried out by staff.

The ODHS serves the interests of the people in the area by executing its functions in a professional, accountable, and responsible manner by employing provincial and national standards and practices in the museum, archives and heritage fields. The ODHS endeavors to maintain its collections in an environment conducive to preservation and conservation.

Both the Museum and Archives offer reference services to individuals, organizations, the municipal government, and other groups interested in the ODHS’ activities and holdings. The ODHS provides educational and outreach programming whenever possible to increase public awareness and appreciation of Oliver and District’s history and development.

The ODHS focuses on four major types of collecting practices in the fields of museums, archives, built heritage, and landscape heritage. This policy provides standards and consistency for the selection, acquisition, preservation, use, and documentation of artifacts, archival materials, and other heritage resources, and for disposal if necessary. The ODHS considers past and present practice, professional, archival and museological standards and ethics, collections management issues, and planning for the future to guide decision making.

Volunteers are central to the engagement of the community and the future of its heritage resources. They play an integral role in the management and care of collections. Staff must support the volunteers through appropriate training, supervision, and acknowledgement. This policy is intended to be used in conjunction with the *Collections Procedures and Guidelines Manual*, which guides staff and volunteers in collections management procedures.

## **II. MUSEUM STATEMENT**

The Museum is the conduit through which the ODHS collects, curates, researches, educates and displays the object history and heritage of Oliver and District. The Museum follows national and provincial professional museum standards, including those of the Canadian Museum Association and the British Columbia Museum Association.

### **Collections Development:**

The ODHS collects artifacts for the Museum Collections in order to:

- Illuminate the mission of the ODHS through public displays, conservation and educational programming
- Provide enjoyment to the public through aesthetic appreciation
- Offer the opportunity for research of artifacts in the collection
- Ensure present and future generations have evidence to the history and evolution of the collecting area over time

The ODHS strives to acquire artifacts and specimens that generally are complete and in good condition, and for which provenance has been documented. Methods of acquisition include donation, purchase, and transfer. As the Museum has limited collections storage space and resources for care and conservation, collecting must be done in a careful, focused manner.

In developing the collection, items will be selected according to the following general criteria:

- Natural history specimens, such as plants, rocks, minerals, fossils and associated materials occurring naturally within the catchment area, and that can relate to the cultural history of the community
- Cultural items that are produced locally
- Cultural items used locally, but produced elsewhere
- Existing material in the collection

The Museum Collection consists of both natural and cultural history specimens and artifacts. Depending on how the artifact will be used, it will fall under one of two primary collection divisions:

- Permanent Collection – comprised of artifacts that the Society wishes to conserve in as close to the current condition as possible, and are therefore formally accessioned.
- Education Collection – comprised of artifacts that may be altered through use (programming, special events, interpretive demonstrations), and that, ultimately, may be expendable. These artifacts are managed through an inventory as opposed to officially accessioned.

### **A. The Permanent Collection**

The role of the permanent collection is to preserve items that reflect the mission of the ODHS. The primary intention is to preserve these objects in perpetuity. Any display or other interpretive use must reflect that intention. This category has one major sub-collection of artifacts, the *Industrial Collection*, which is comprised of nonworking artifacts that illuminate the industrial history of the area.

The decision to acquire an artifact or specimen for the permanent collection will be based upon the following considerations:

- Relevance to the mandate of ODHS and to collections development objectives
- Significance through association with an event, person, historical period or geographic area
- Availability of human and financial resources to document, preserve, store, exhibit, etc.
- Physical condition
- Cultural sensitivity
- Authenticity and Provenance
- Documentation supporting ownership, authenticity, history of use
- Absence of restrictions or special conditions

These items should be handled rarely, and only by qualified persons with appropriate conservation measures in place. The documentary record and subsequent care associated with these items reflect the significance of the item to the mission of ODHS. All artifacts in the Permanent Collection are formally accessioned.

## **B. The Education Collection**

By identifying certain items as part of the Education Collection, ODHS is emphasizing the value of the Museum as an educational facility for our community. The role of the Education Collection is to enhance the ability of the ODHS to communicate its mission to its audience through interactive experience-based programming.

Artifacts and specimens may be acquired, through purchase or donation, specifically for the Education Collection or may be transferred from the Permanent Collection to the Education Collection. Ultimately, these objects may be expendable, and as such, require a lower level of care, documentation, conservation, and restoration. They are not accessioned but may be inventoried. The Education Collection also has a subcategory for a working Industrial Collection, whereby the artifacts are maintained in working order for interpretive means.

The decision to designate an item as part of the Education Collection will be made collaboratively between the Collections Manager and the Community Heritage Manager. Artifacts or specimens donated specifically for use in the Education Collection will be identified as such on the Deed of Gift Agreement.

Artifacts or specimens designated as part of the Education Collection must:

- Fulfill a program need
- Be safe to use
- Be in reasonably good condition and/or working order
- Be easily replaced or duplicated

## **C. Sub-collections**

Currently, the ODHS has one sub-collection, the Industrial Collection. Other sub-collections may be identified in the future as the ODHS continues to develop its collections.

## 1. Industrial Collection

The role of the Industrial Collection is to reflect the industrial evolution of the community. Because this type of artifact may be operational and can range dramatically in size and complexity it often requires special consideration regarding conservation, display and access. Artifacts in this sub-collection are categorized under the *Permanent Collection* or the *Education Collection*, depending on how they are to be used.

An Industrial Collection often provides an opportunity to access or even witness the operation of large pieces of equipment not normally accessible to the general public during its working life. Decisions affecting permanent versus educational designation are based on a number of factors including:

- Rarity
- Operational risk
- Degree of contemporary intervention (i.e., current or recent modifications)
- General condition
- Operating, storage and conservation costs
- Exhibit and programming opportunities

If an Industrial Collection object is to operate as part of the Education Collection, it will require standard records management and a "Use and Maintenance" log including, wherever possible, assembly of relevant operating manuals. Additionally, safety training of operators (staff, volunteers) is required to meet government regulations.

## III. ARCHIVES STATEMENT

The Archives' purpose is to identify, collect, preserve, and present material of archival and/or informational value pertaining to the history and development of Oliver and District, and of its citizens both past and present.

The term "material" is here defined as any kind of recorded information, regardless of physical form or characteristics. It includes, but is not limited to textual records, digital records, photographs, films, machine readable magnetic and optic media, art, maps, plans, and sound recordings. Material acquired by the Archives is classified as either "archival" or "reference" (non-archival) material.

### **A. Archival Material**

Archival material is unique and original material created, or received and accumulated, by a person, family or organization in the course of the normal conduct of affairs, and preserved because of its continuing value. These records provide evidence of the activities of their creator in carrying out his/her/its everyday affairs. Original material is preferred; however copies of original material are acceptable. Archival material is formally accessioned.

### **B. Reference (Non-archival) Material**

The term "reference material" refers to material collected or created artificially on the basis of some common characteristic (e.g. a particular subject) for the purpose of preservation. This material does not provide evidence of the activities of a creator in his/her/its normal conduct of affairs, and therefore cannot be said to have archival value. However, material of this sort may have substantial informational value in that it could provide both a source of historical information

for researchers and a historical context for the archival records in the holdings. Reference material may include copies of photographs, newspaper and magazine clippings, reference books, pamphlets, and other published material.

The Archives follows accepted and consistent standards, methods, and procedures as represented in Rules of Archival Description (RAD) as laid out by the Canadian Council of Archives nationally accepted standards, and strives to provide appropriate conditions for the exhibition, storage, and preservation of archival material.

As the trustee of the documentary heritage of the community, the ODHS manages the acquisition, disposition, and description of all archival material. Staff ensures appropriate and permanent care of records of historical value, in order to make them available for use both now and in the future.

The Archives are accessible to researchers and the general public whom must observe the regulations. Staff will ensure that patrons are made aware of the regulations and will assist in providing the appropriate material.

#### **IV. ACQUISITIONS**

Objects for the Museum and Archives Collections can be acquired through donation, purchase, transfer, and field collecting. The decision to acquire archival material, artifacts or specimens will be based upon the following guidelines:

- The object is consistent with the mission, purpose(s) and activities of the ODHS and is relevant to the mandate and collections development objectives of the ODHS.
- The ability to document, store, preserve and exhibit objects under conditions that will ensure availability and adhere to professional standards.
- Objects will be housed permanently as long as physical integrity, identity and authenticity are maintained, and the item remains relevant to the mission of the ODHS.
- Legal ownership of object is established and documented.
- All donations are accepted as free and unrestricted gifts, to be used at the discretion of the ODHS. The ODHS does not guarantee the exhibition of any object.
- All moral, legal, and ethical implications of the acquisition must be considered, including:
  - The ODHS will not knowingly or willfully acquire objects that have been collected contrary to international, national, provincial, or local laws and regulations, treaties, and/or conventions.
  - When objects of cultural or spiritual significance to ethnic groups or religious communities are considered for acquisition, ODHS staff, upon recommendation of the Collections Committee<sup>1</sup>, will make informed judgments as to appropriateness for acquisition, with sensitivity to subsequent care and/or exhibition of such objects. Acquisitions will be made in accordance with applicable laws. (See Culturally Sensitive Materials Policy below for more information)

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<sup>1</sup> Collections Committee is currently made up of entire Board; as the number of Trustees increases, the Collections Committee will be a more formalized and focused group.



- Whenever possible, objects will be documented or documentable, including, but not limited to, provenance, artist/maker, date, use, and intellectual property rights (copyright, trademark, etc.). ODHS staff must ascertain whether such intellectual property rights limit the use of an object.
- No object will be collected which constitutes a potential hazard to personnel, environment, facilities, or collections.
- The ODHS will not be held accountable for unsolicited gifts including those intended for the Museum and Archives Collections.

Items owned by private individuals will not be stored or displayed by the Museum or Archives except when acquired on short term loan for the express purpose of being used within an exhibit, program or at a special function.

Purchase or transfer of any item over \$1,000 must be accompanied by an independent appraisal, conducted by a qualified appraiser. The Canadian Revenue Agency (Agency, 2013) will be consulted where doubt exists regarding the need for an appraisal.

Objects found within the existing collection which have no documentation will be considered to be 'found in collections' (FIC) until such documentation is located and demonstrates that the ODHS has ownership rights; and/or enough time has passed for the item to be considered abandoned property according to provincial regulations and then becomes the property of the ODHS.

#### **A. Fire Arms**

ODHS will meet provincial and federal regulations on the care and handling of firearms and military ordinances.

#### **B. Works of Art**

In general, the ODHS will not collect works of art. Works of artistic merit are best collected by an institution with an expressed mandate. However, exceptions may occur if, for example, a work is deemed to have outstanding historic significance or is one that meaningfully compliments the collection and the mission of the ODHS.

#### **C. Built and Landscape Heritage Resources**

The acquisition and management of built and landscape resource are often beyond the ability of a nonprofit society to take on as sole proprietor. This is usually due to limited human and financial resources. In the case of publicly owned assets, a complicated ownership/governance/regulatory environment may also preclude acquisition.

Effective preservation and desirable public access is best achieved in these instances using a partnership model. In terms of privately owned resources, the acquisition costs alone usually preclude a purchase. A better approach is for local government to utilize incentives and regulatory tools available to them in order to achieve public benefit without overly penalizing an owner. Whether publicly or privately owned, a heritage resource can be protected using one of a variety of legislated mechanisms available only to government, most often those provided through the Heritage Conservations Amendment Act's tool kit of regulations and incentives.

Consequently, the role of the ODHS will be as the primary advocate for heritage preservation and the catalyst for collective action. In the main, it will function as a facilitator and advocate as opposed to owner. The ODHS can achieve success through others if it supports local government in the creation, adoption and maintenance of a community based heritage conservation program and in which stewardship of associated artifacts and archival materials is its primary activity.

Research and education are central to informing the general public and partners about the value and benefits associated with retaining specific resources. This includes endeavouring to identify an appropriate adaptive use, one that respects a Statement of Significance including values and identified character defining elements.

The ODHS is ideally suited to:

- Lead the community in the identification of valued heritage resources
- Act as heritage educator throughout the community
- Facilitate successful community based partnerships
- Enlist or provide reliable and trusted knowledge to decision makers, and potential partners regarding legislation, standards and best practices
- Assume a short term and direct role relative to a specific undertaking
- Assist with the interpretation of and access to a resource

The above list does not limit the ODHS from acquiring, managing or disposing of heritage property when appropriate including being financially and ethically sound.

## **V. CARE OF COLLECTIONS**

It is the responsibility of the ODHS to protect and preserve the integrity of the objects in its collections. The goal of the collections care program is to ensure that objects are stored, handled, used, and exhibited in such a way that the long-term preservation of the objects is not compromised, and that objects are cared for according to current professional museum and archival standards.

The Collections Manager is responsible for overseeing the care of collections, including the care of objects on loan to the ODHS for exhibit purposes. The Collections Manager develops and implements policies and procedures, upon approval by the Community Heritage Manager, which provide guidelines for the preservation of the collections, and will maintain current knowledge regarding developments in the field of collections care.

Preventive conservation is preferred to conservation treatment. When treatment is necessary, the goal is to preserve the object through the least intrusive means practicable. The Collections Manager must approve conservation treatments. Care will be taken to maintain respect for the integrity of the object, the history of the object, and the reversibility of the treatment. A professionally trained conservator may be consulted as funding allows.

The ODHS is committed to an integrated pest management approach to pest control at all facilities. ODHS staff will work to implement a formal integrated pest management program.

The Collections Manager coordinates with the Community Heritage Manager to maintain the security of collection environments on a daily basis and in the event of an emergency through the *Emergency/Disaster Preparedness Plan*.

## **VI. USE OF COLLECTIONS**

### **A. Internal Use of Collections**

Objects from the collections may be used for exhibition, research, and education. The Collections Manager will determine suitability of an object for use, dependent on condition of the object, availability of like objects, significance of the particular object, and inherent risk to the object. Permanent collection objects may not be exhibited in individual offices or other non-public spaces.

The Collections Manager, in consultation with the Community Heritage Manager, will determine when an accessioned or loaned object is exhibited, that it is done in a manner that follows accepted conservation practices.

### **B. Access to Collections**

The ODHS makes its collections available for research, exhibition, education, publication, and other appropriate purposes. The type and conditions of such use must be consistent with the ODHS's responsibility for care and preservation of its collections, and may be contingent on staff availability. The Collections Manager grants approval for access to collections. The primary considerations for access are condition and significance of the object(s) and availability of other sources for information such as duplicates, photographs, and written descriptions.

### **C. Photography**

Photography of objects on exhibit is permitted for personal use, using a hand-held camera with no flash. Use of tripods, flash, or other specialized equipment requires approval from the Collections Manager. Photography of objects not on exhibit requires filing a *Request for Access* form in advance, and approval from the Collections Manager.

### **D. Publication/Copyright**

Publication or broadcast of an item from the ODHS's collections requires written permission from the Community Heritage Manager. This permission is required whether or not the ODHS is the copyright holder. Permission also may be required from the copyright holder. See *Rights and Reproduction Policy*.

### **E. Reproduction/Commercial Use**

The Community Heritage Manager must approve reproduction/replication of objects in the collection. A reproduction fee is charged for commercial use. In arranging for the manufacture and sale of replicas, reproductions, or other commercial items adapted from an object in the ODHS's collections, all aspects of the endeavor must be carried out in a manner that is respectful of the original object, and that maintains the integrity of the ODHS. Oversight must be provided which ensures the accuracy and high quality of the product. Any reproduction or replication must be clearly and permanently marked as such. See *Rights and Reproduction Policy*.

## **F. Fees**

Access and use of collections may involve fees. Fees will be based on staff time and any associated costs such as photocopying. The Collections Manager will maintain a current fee schedule. See *Rights and Reproduction Policy*.

## **VII. DEACCESSIONS**

Deaccession, the permanent removal of an object from the collections, must be undertaken with caution, deliberation, and discretion. The primary purpose of deaccessioning is advancement of the quality and preservation of the collections; any funds generated by deaccessioning are used only for acquisition or direct care of the collections.

### **A. Repatriation of Culturally Sensitive Materials**

Deaccession for repatriation involves considerations unique to that issue and is addressed in the *Culturally Sensitive Materials Policy* in this document.

### **B. Return to Donor Requests**

If a donor or heirs/successors request the return of an object, it can be returned only if ODHS records contain evidence that the object is not the property of the Society and that all legal requirements establishing ownership are satisfied.

The Canada Customs and Revenue Agency states "In most cases a registered charity cannot return a donor's gift. At law, a gift transfers ownership of the money or other gifted property from the donor to the charity. Once the transfer is made, the charity's governing documents oblige it to use the gift in carrying out its charitable purposes."<sup>2</sup>

The Canada Customs and Revenue Agency and the B.C. Provincial Heritage Conservation Act (1996) should be consulted for further information regarding requests from donors to have gifts returned.

### **C. Disposal**

When disposing of deaccessioned items, the ODHS must balance the interests of the ODHS, the public, the donor's intentions in the broadest sense, and the scholarly and/or cultural communities of which the ODHS is a part. In keeping with national standards, the ODHS will be as transparent in its deaccessioning as possible.

## **VIII. LOANS**

The ODHS's loan guidelines are designed to support a philosophy of accessibility to collections. The ODHS may borrow from or lend to museums, archives or similar educational non-profit

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Canada Revenue Agency. (2011). *Returning a gift to a donor*. Retrieved April 5, 2013, from Canada Revenue Agency's Web site: <http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/gfts/rtrnng-eng.html>.

organizations for purposes of exhibition, education, or research. The purpose of any loan must be consistent with the mission and goals of the ODHS.

The ODHS recognizes special ethical obligations toward communities or cultural groups from which objects have been acquired, and will make every reasonable effort to honour loan requests from these entities.

#### **A. Outgoing Loans**

Requests for loans from the collections must be in writing and approved by the Collections Manager. Requests will be considered on a case-by-case basis and approval is contingent on considerations such as the condition and conservation needs of the requested object(s), the exhibit or program plans of the ODHS, and staff time available for processing loan requests. See Appendix for Outgoing Loans Procedures.

#### **B. Incoming loans**

The ODHS may request the loan of a specific object or objects from an individual or from another institution for the purpose of exhibition, identification, evaluation for accession, replication, or for study or research. See Appendix for Incoming Loans Procedures.

### **IX. CULTURALLY SENSITIVE MATERIALS**

The contributions made by the various cultural and ethnic groups that have populated the Oliver and District region constitute a rich part of the area's history and of contemporary life in the South Okanagan. The collections of the ODHS reflect this influence and include objects of the material culture of these groups. The ODHS is committed to preserving the record of this cultural heritage; the ODHS also recognizes that these are living cultures, and is committed to a collaborative relationship with groups who may have convictions regarding treatment, use, and ownership of culturally sensitive materials.

Culturally sensitive materials are those objects or other materials, which have sacred significance to contemporary cultural groups, and whose treatment, custodianship, and use is a matter of profound concern to those groups. The ODHS recognizes the concerns of First Nations, other ethnic groups, and religious communities from whose cultural heritage such materials derive. This policy addresses the treatment and disposition of culturally sensitive materials, which may be part of the ODHS's collections, and establishes guidelines regarding future acquisition of such materials.

The ODHS recognizes that legal purchase and possession of material objects does not in itself encompass purchase or possession of rights to ritual or spiritual qualities which may be associated with the object, and that those rights that do exist from material objects remain in possession of the originating people.

#### **A. Acquisition**

The ODHS will not knowingly acquire an object with sacred significance to a cultural group and whose possession of or use by the cultural group is considered essential for religious purposes. The ODHS will act as an intermediary to facilitate the return of such objects to their group of origin, or will take other actions as appropriate to that end.

The ODHS will not accept into its collections archaeological material removed from private or public lands. Potential donors of such material will be directed to the Heritage Branch of the B.C. Government for further information.

The Collections Committee will review potential acquisitions that may be culturally sensitive. An ODHS representative will confer with a First Nation's authority or other relevant consultants as needed.

## **B. Treatment and Use**

Objects identified as culturally sensitive will be exhibited only with prior consent of the culturally affiliated group's legally designated governance.

The ODHS is committed to dialogue and consultation with cultural groups to ensure that objects are exhibited, interpreted, cared for, and/or stored in a way that is sensitive to cultural standards and wishes in addition to recognized provincial and federal guidelines.

Public access to culturally sensitive materials is restricted. Every reasonable effort will be made to honor requests for access to culturally affiliated groups or individuals. Access for research purposes will be carefully considered and granted when such use is not in conflict with respectful and appropriate treatment of the materials.

Requests for loan of materials, documentation, or technical assistance from communities or cultural groups from which objects have been acquired will receive special consideration, and every reasonable effort will be made to honor such requests.

## **C. Repatriation**

Repatriation is the return of culturally sensitive materials to appropriate parties. The ODHS views repatriation as an opportunity for a mutually beneficial relationship based on trust and open dialogue. It is the policy of the ODHS to respectfully consider all repatriation requests in accordance with current professional standards and guidelines. It is the ODHS's intention that any objects that are actively needed for the current practice of a traditional religion, consist of human remains or funerary objects, or that are essential to the well being of a cultural group, be returned to the appropriate parties. If conflict exists between cultural groups over appropriate ownership, the ODHS will suggest mediation by an objective third party, but will not actively participate in the mediation. Conflict issues must be resolved before repatriation can be concluded.

Release of objects for repatriation will be treated and recorded as a deaccession, in which case all normal deaccessioning procedures (except disposition) will be followed. However, in these cases, the Collections Committee and staff maintain the right to seek advice of qualified outside experts in determining legitimacy of claims.

## **X. REFERENCES**

Canada Revenue Agency. (2011). *Returning a gift to a donor*. Retrieved April 5, 2013, from Canada Revenue Agency's Web site: <http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/gfts/rtrng-eng.html>.

Canada Revenue Agency. (2012). *Qualified donees – Consequences of returning donated property*. Retrieved April 5, 2012, from Canada Revenue Agency's Web site: <http://www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/cgd/rtrng-dntd-prpty-eng.html>.

Government of Canada. (2013). Income Tax Act (R.S.C., 1985, c.1 (5<sup>th</sup> Supp.)), ss. 149.1, 110.1(14) to (17), 118.1(25) to (28), 168(1) (c), 188.1 and Reg. 350.1. Retrieved April 8, 2013 from Government of Canada Justice Laws Web site: <http://laws-lois.justice.gc.ca/eng/acts/I-3.3/index.html?=slnk>

## **XI. APPENDICES**

- A. Acquisition Guidelines
- B. Access Guidelines
- C. Deaccession Guidelines
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To be added at future date:

- F. Collections Procedures and Guidelines Manual
- G. Collections Related Forms (Object Record, Condition Report, Request for Access, etc.)
- H. Disaster/Emergency Preparedness Plan
- I. Archival Services and Fees Policy
- J. Rights and Reproduction Policy
- K. Fee Policy
- L. Heritage Conservation Act of BC
- M. Unclaimed Property Act of BC



## A. Acquisition Guidelines

### 1. Donated Objects:

The Collections Committee will be convened or consulted at the discretion of the Community Heritage Manager to address potential acquisitions. Acquisitions valued at \$1,000 or more must be approved by the Board.

- Upon receipt of the potential acquisition, the Collections Manager or other qualified ODHS staff will complete a *Temporary Custody Receipt* form. This establishes immediate record of the acquisition and provides the information necessary for completion of a *Deed of Gift*. The donor(s) will receive a *Temporary Custody Receipt* form, signifying only the ODHS's willingness to evaluate the potential gift as an acquisition. This step may be waived if the Collections Committee has predetermined that the gift shall be accepted into the collection.
- Potential acquisitions will be reviewed and approved by the Collections Manager and Community Heritage Manager jointly before being accepted into the collections. The Collections Committee will be convened on an as-needed basis by the Community Heritage Manager to address potential acquisitions that require further review.
- Upon acceptance by the ODHS, the Collections Manager will create a *Deed of Gift* form which will list the donated item(s) and be signed by the donor or personal representative of the donor and the Collections Manager. The *Deed of Gift* represents transfer of clear, legal, and unrestricted title of the donated objects. The donor will receive a copy of the *Deed* at the time of the transaction or as soon thereafter as possible which serves as assurance that the donor owns (or has legal authority to act on behalf of the owner) and has clear title to the property being conveyed, and that the donor is transferring title of the gift to the ODHS.
- Items designated for the permanent collections will be promptly accessioned, i.e., a permanent record created upon receipt of an object, and an accession number assigned. The accession record includes the accession number, date and nature of acquisition (e.g., donation, purchase), source, and brief identification and description.
- Items designated for the education collection will be assigned an 'EC' number and inventoried accordingly.
- Following accessioning, collections will be catalogued, photographed, cleaned and/or conserved as necessary, and prepared for storage or exhibition in accordance with current professional standards. The Collections Manager will provide documentation regarding provenance and other relevant object history.
- An accession record, in electronic and hard copy, of all collections' objects will be maintained by the Collections Manager. The record will document method of acquisition and provide description, object information and current location. Auxiliary information, such as appraisal or research notes, will also be maintained as part of this permanent record.
- A permanent donor file will be maintained by the Collections Manager. Copies of all legal documentation, as well as pertinent notes and correspondence, will be kept in these files. Original *Deeds of Gift* will be stored in a secure and fireproof location.

- Acceptable items will have permanency in the collections as long as they retain their physical integrity, identity and authenticity, and remain consistent with the ODHS's purpose.
- No judgments as to appraisal or valuation of donations or potential donations will be provided by the ODHS other than for internal use.

## **2. Purchased Objects**

- When budget allows, potential acquisitions will be reviewed and approved by the Community Heritage Manager (or Collections Committee if valued over \$500) prior to purchase. Typically, these items are identified by the Collections Manager.
- The original receipt and purchase order will serve as the initial permanent record of acquisition.
- Purchased collections will be accessioned using the same process as donated items. See above.

## **B. Access Guidelines**

To provide maximum access to the collections while maintaining appropriate security and preservation standards, the following procedures govern access:

- A *Request for Access* form must be completed in advance and submitted to the Collections Manager.
- The Collections Manager determines extent of access and supervision.
- The Collections Manager will advise proper use and handling of objects, and provide appropriate supervision.
- Access may be revoked for the safety of collections; users may be liable for damage.
- Access to certain types of objects (e.g. culturally sensitive), and certain types of information (e.g. donor files, values, and locations) are restricted.
- The Collections Manager maintains records, both electronic and hardy copy, of all collections use.
- Access to and use of the collections and records must be credited in all publications, exhibitions, and other presentations. See *Rights and Reproduction Policy*.
- The ODHS may request a copy of any publications or other products of research, which result from access to collections. See *Rights and Reproduction Policy*.
- No commercial or promotional use of the ODHS's permanent collections, or information or images resulting from their examination, will be allowed unless specific approval in writing is granted by the Collections Manager. See *Rights and Reproduction Policy*.

## **C. Deaccession Guidelines**

### **1. Procedures**

For an object to be considered for deaccession, one or more of the following criteria must be met:

- The object is not relevant to the objectives and mission of the ODHS. It does not pertain to the history, ethnology, natural history or archaeology of the community.
- The object cannot be properly stored, preserved, or used, given the resources available to the ODHS.
- The object is deteriorated beyond any useful function for exhibition, research, study, or other purpose.
- A duplicate or similar object in the collection is in better condition and is more fully documented, i.e. has provenance.
- Transfer of the object to another institution is clearly more appropriate and in the public interest than its retention by the ODHS.
- The object is determined to be inappropriate for the collections based on period, place, authenticity, or hazardous to personnel or collections.

An object may be deaccessioned and transferred into the Education Collection or used as an exhibit prop if it is determined to be duplicative, deteriorated such that repair would compromise its authenticity, or otherwise inappropriate for the permanent collections.

The Collections Manager will initiate the procedure to deaccession by completing a Deaccession form, providing the following information:

- Historical context
- Date and circumstances of acquisition
- Source
- History of exhibition and use of the object if known
- Reason for deaccessioning
- Any special conditions or restrictions affecting the accession/ deaccession of the object
- Proposed method of disposition

Deaccessions will be referred for approval to the Collections Committee, acting on the recommendation of the Community Heritage Manager. Consensus of all signatories is required for the deaccession to proceed. A complete record of all deaccessions, including final disposition, date completed, and person responsible for the deaccessioning, will be maintained by the Collections Manager as part of permanent collection records.

### **2. Disposal**

Objects to be deaccessioned will first be offered for transfer to another non-profit heritage organization that endeavors to retain its collection in perpetuity.

Objects that cannot be transferred to other non-profits will be offered for sale at an auction held at arm's length to the ODHS and notice of the auction will be published in regional newspapers. All

proceeds from an auction will accrue to an acquisitions/collections care fund and may not be used for any other purpose.

If the object has no value and cannot be deaccessioned through transfer or auction, then staff may destroy the object. Likewise, if an object is irreparably damaged, the appropriate method of disposal may be destruction. Two ODHS staff or volunteer members should witness the destruction.

Under no circumstances will deaccessioned objects be acquired by members of the governing body, staff or their families, volunteers, agents or friends of the members of the governing body. The final decision for deaccessioning rests with the Collections Committee.

Accession numbers must be removed from the object prior to disposal.

The proposed method of disposal is submitted as part of the proposal to deaccession, and routed for approval to the Collections Committee as outlined above. Final disposition is documented in an object's permanent collection record.

## D. Loans Procedures

### 1. Outgoing Loans

The following criteria apply to all loans from the collections of the ODHS:

- Loans are made only to qualified museum, archive, educational, or research institutions with purposes and objectives similar or related to those of the ODHS. Loans are not made to individuals or students. The Community Heritage Manager must approve any exceptions to this policy. Loans must be requested by an official representative of the borrowing agency.
- The borrower must demonstrate intention and ability to provide appropriate standards of care in handling, exhibition, security, storage, and transportation. The ODHS may require completion of a standard facilities report prior to approval of a loan request.
- The objects must be able to withstand the stress of packing, transport, handling, exhibition, and fluctuations in environmental conditions.
- The loan will be for a specified period of time, dependent on the purpose of the loan, but usually for no more than one year. Loan agreements may be reviewed for renewal annually. The ODHS may request return of an object prior to expiration of the loan agreement; the ODHS will try to provide reasonable advance notice, and provide assistance in securing a substitute object.
- Objects must not be repaired, treated, or otherwise altered without the advance written permission of the ODHS. In an emergency, telephone contact must be made for verbal approval, followed by written permission.
- Damages, whether in transit or on the borrower's premises, and regardless of who may be responsible, will be reported to the ODHS immediately. No action is to be undertaken to correct the damage without the ODHS's approval.
- Outgoing loans must be fully documented. The Collections Manager and the borrower must sign all loans. A completed Loan Agreement form must be in the possession of the ODHS before any physical transfer of objects may occur. The borrower will complete a written condition report upon receipt of objects, and upon preparation of objects for return.
- The borrower will insure objects at the value specified by the ODHS, to be in effect from the time that the objects leave the ODHS until they are returned. In the case of traveling exhibits, responsibility for insurance coverage will be specified as part of the exhibit contract. A *Certificate of Insurance* for the required amount is necessary for completion of the Loan Agreement.
- The borrower must agree to follow any guidelines or specific instructions for exhibition of an object provided by the ODHS.
- When on display, loaned objects must be identified with an approved credit line, provided by the ODHS. Modifications must be approved by the ODHS.
- Loaned objects cannot be transferred to a third party without written consent from the ODHS. Such transfer will require a new loan agreement between the ODHS and the third party.

- Material belonging to the ODHS will not be reproduced in any manner without written permission from the ODHS.
- Loaned objects must be packed and returned in the same manner as received. Any changes in method or materials must be authorized in advance.
- The borrower agrees to pay costs associated with preparing and executing the loan. Such costs will be specifically identified and may include appraisal, conservation, couriering, exhibit preparation, packing, and shipping. An estimate of such costs will be sent to the borrower prior to loan approval.
- Any funds generated by loan fees above and beyond the costs associated with preparing and executing the loan are used only for the continued care and exhibition of the collections.
- Additions or deletions to a loan agreement by either the ODHS or the borrower must be written and agreed to by both parties.

## **2. Incoming Loans**

The following conditions apply to incoming loans:

- The ODHS will not accept indefinite or “permanent” loans. Loans will be for a specified purpose for a specified period of time.
- Prior to receipt of a loan, a Loan Agreement form will be completed and signed by the lender and the Collections Manager, identifying the objects and specifying the purpose and the time period of the loan. A loan agreement may be renewed with the approval of both parties.
- Objects on loan to the ODHS will be processed and cared for according to the same standards as objects in the ODHS’s permanent collections.
- The ODHS will not repair, treat, or otherwise alter loaned objects without express permission of the lender, or the lender’s agent.
- The ODHS will not transfer possession of objects it has received on loan without express written permission of the lender, or lender’s agent.
- Borrowed material will not be reproduced in any manner without express permission of the owner of the original material, or his/her legal agent.
- The ODHS will insure incoming loans for exhibit or research purposes. The ODHS will not insure loans left without appropriate documentation or for identification.
- In case of change of ownership during the specified loan period, legal title must be established by previous owner and/or current owner, and a new loan agreement signed as soon as possible.
- The ODHS will release loaned material upon reasonable notice (60 days) from the lender.

- The ODHS reserves the right to give reasonable notice to the owner that it desires to return a loaned object. Failure to withdraw the loan may result in the object being returned to the owner, stored at owner's risk without insurance coverage, or disposed of.
- Unclaimed loans are handled according to relevant provincial law.
- The ODHS does not accept unsolicited loans; loans which are unaccompanied by information identifying the owner and which are not retrieved after a reasonable length of time may be disposed of or treated as a donation.



## **E. Ethics Policy**

The policy established here provides ethical guidelines for all ODHS staff, trustees, and volunteers regarding activities relating to the collections. This policy is congruent with and in addition to a national standard for Museum and Archives ethics, provincial and federal government laws and regulations, and other policies or codes that may govern the activities of specialties within the heritage profession.

### **1. Museum and Archives Collections**

The ODHS will acquire or accept an object only when it can determine with reasonable certainty that the object has not been unethically obtained, or obtained in violation of provincial or federal laws, treaties, or international agreements.

If the ODHS inadvertently acquires an object that is subsequently determined to have been received in violation of this policy, the ODHS will make every effort to return the object to the transferor, or, if appropriate, to the proper authority, keeping in mind the preservation of the object. The Community Heritage Manager will make the final decision as to appropriate action in cases of questionable acceptance of objects.

Staff and Board members must conduct their collecting activities within recognized standards that avoid, insofar as possible, the adverse effects of such collecting. These principles apply to the acquisition of objects for all ODHS activities including educational, research, or exhibition purposes.

Removal and disposition of deaccessioned objects from the collections will be done legally and ethically, and must represent the best interests of the ODHS and the public trust in maintaining and preserving the collections. ODHS trustees, staff members, and volunteers may not acquire objects deaccessioned from the collections.

### **2. Personal Collecting**

A possibility for conflict of interest, or appearance of such, exists whenever a staff member, volunteer, or trustee personally collects objects of a type collected by the ODHS. When collecting, these individuals should always consider the interests of the ODHS over their own personal interests. The ODHS has the responsibility to inform its trustees and staff members of its collecting goals and of the potential for conflict of interest.

A staff member, volunteer, or trustee considering the acquisition of an object that may be within the ODHS' collecting goals should inform the Collections Manager or the Community Heritage Manager in a timely manner to determine whether the ODHS is interested in acquiring the object for the collections. If the ODHS does not intend to acquire the object, the Collections Manager will formally decline, in writing, the acquisition of the object, thereby waiving the ODHS's future interest. When it is not possible to consult the appropriate staff in advance, the individual may acquire the object but will disclose the purchase as soon thereafter as possible. If the ODHS wishes to acquire the object, it will reimburse the employee or trustee the amount of the purchase price.

ODHS staff, volunteers, and trustees have an obligation to notify the ODHS of their collecting goals if they might conflict with those of the ODHS.

ODHS staff members, volunteers, and trustees may not use their institutional affiliation to promote their own or an associate's personal collecting or business activities. No staff member may participate in any dealing (buying or selling for profit as distinguished from occasional sale or

exchange from a personal collection) in objects similar or related to the objects collected by the ODHS.

The guidelines outlined above do not apply to objects acquired prior to the adoption date of this policy; objects acquired prior to employment or service on the ODHS's board; or objects acquired through bequests or as genuine personal gifts.

ODHS staff will not store or conserve personal collections on ODHS property, unless a formal agreement is executed with the ODHS for its own purposes. If employees lend objects from a personal collection for an ODHS exhibition or other purpose, they should do so anonymously. Donations from ODHS employees will be treated as normal donations.

### **3. Appraisals**

No employee of the ODHS will make or participate in an appraisal or estimation of the value of an object, either as a service to an individual or as a precondition for a potential donation of an object to the ODHS. Staff may prepare or obtain appraisals for internal use (e.g., insurance, valuation for loans).

It is regarded as a potential conflict of interest for any ODHS employee to engage in appraisals as an outside business or activity. The related areas of identification, authentication, and description may present the appearance of conflict of interest; approval by the Board of Directors should be obtained before pursuing these activities outside ODHS employment.

ODHS personnel will not refer appraisal requests to a specific firm or individual. General help, such as the names of two or three individual appraisers, or referral to appraiser trade associations or societies, may be given. The ODHS's position and the problems created by the practice of appraisal or the recommendation of appraisers should be carefully explained in response to inquiries or requests, e.g., conflict of interest, etc.

### **4. Ownership Rights**

The objects in the ODHS's collections and the associated documentation are the property of the ODHS, and are held in public trust. All materials or items developed and produced by staff while carrying out their responsibilities as employees are considered property of the ODHS. Staff may not duplicate materials developed at the ODHS by them or others for the purpose of resale or personal profit.

### **5. Truth in Presentation**

The ODHS recognizes its responsibility to provide accurate and accessible interpretation of the objects in its collections. Staff will be meticulous in research, documentation, and interpretive presentation to ensure the accuracy of information presented to the public. The ODHS will use its collections, including reproductions when appropriate, in exhibit contexts which are based in current scholarship, and which strive to present an authentic experience.