

TRAIL MUSEUM & ARCHIVES

our reflections. our connections.

COLLECTIONS MANAGEMENT POLICY

DEVELOPED IN COOPERATION AND
CONJUNCTION WITH THE
BOARD OF THE
TRAIL HISTORICAL SOCIETY



TRAIL HISTORICAL SOCIETY

SEPTEMBER 2017

1. INTRODUCTION

1.1 MISSION STATEMENTS

The mission of the Trail Museum & Archives (TMA) is to actively engage community residents and visitors in the pursuit of knowledge, appreciation and understanding of local and regional history.

The mission of the Trail Historical Society (THS), legal owner of all Collections exhibited, interpreted, utilized, accepted by and stored in the TMA and offsite locations, is to collect, preserve, display and otherwise make available for use, objects, printed materials and historic records relating to the history of Trail and to the Kootenay region in general. Additionally, it is to encourage interest in the history of Trail through making provision for the public use of the Collections, insofar as this is compatible with the preservation of these materials.

The THS and the TMA work collaboratively to unite these missions and provide cultural resources to the community.

1.2 ORGANIZATIONAL HISTORY

The THS was organized in 1953 as a branch of the BC Historical Association (now the BC Historical Federation). In 1978, the name was changed to the Trail Historical Society. In 1977, the Trail Museum was founded in City Hall and in 1978, the Trail City Archives was established. In 1988, the THS assumed responsibility for the Sports Hall of Memories in the Trail Memorial Centre, as well as its vast collection of sports heritage. As a result, the THS owns and identifies three distinct collections: artifact (museum), sports (Sports Hall of Memories), and archival. The THS hired its first staff member in the late 1990s and, with the construction of the Riverfront Centre, the City of Trail assumed responsibility for staffing the delivery of museum and archives services. A Memorandum of Understanding signed between the board of the THS and the City of Trail details the new relationship between the parties: the THS retaining ownership of the collection and TMA staff delivering all cultural services within the Riverfront Centre. The THS remain active collaborators, contributors, and advisors to the City with respect to the Collections, exhibitions, and programming.

1.3 STATEMENT OF PURPOSE

This document is designed to guide staff of the TMA and THS Board of Directors on matters pertaining to the use, growth, and preservation of the Collection's current cultural and historical content, as well as the process by which future acquisitions and accruals are incorporated into the Collections.

2. AUTHORITY

2.1 STATEMENT OF AUTHORITY

Final responsibility for the Collections lies with the THS, as the legal owner. TMA staff act as registrars, curators, exhibitors, and interpreters in keeping with industry standards on behalf of the Trail Historical Society. The Cultural Advisory Committee, consisting of stakeholders from the City of Trail, the TMA, and the THS will work collaboratively to solicit and vet potential artifacts, documents, photographs and related material which further the mission of both the TMA and the THS.

TMA staff, under the guidance of this document, the Collections Strategy and the Cultural Advisory Committee, will perform all curatorial, interpretive, and registrar duties. In extraordinary situations, whereby an acquisition requires further consideration, the THS will be directly consulted. Individuals directly responsible for the care and use of the collections are: the Collections Coordinator (TMA) and the Museum Manager (TMA).

3. SCOPE OF COLLECTIONS

3.1 GEOGRAPHIC AREA

The Collections consist of historical textual documents, photographs, artifacts, and multi-media pertaining to the history of Trail, its people and events. In some instances, the geographic scope broadens to include the Lower Columbia region, and, on occasion, the West Kootenay.

3.2 TIMEFRAME

The Collections date to as early as the 1860s and continues to accrue items relevant to the culture and heritage of Trail, its people and events.

3.3 SUBJECT MATTER

Subjects relevant to the Collections include (but are not limited to):

- First Peoples
- Columbia River
- Early Settlement
- Municipal Issues
- Demography (including immigration)
- Socio-Cultural Matters (including the Arts)
- Sports and Recreation
- Industrial and Commercial Heritage

Items not relevant to the Collections will not be considered for accessioning in the permanent collection.

3.4 USE OF COLLECTIONS

The Collections are intended for exhibition, interpretation, and programming, but also scholarly and academic research for the purpose of cultivating an understanding of Trail's history.

4. CATEGORIES OF THE COLLECTIONS

4.1 The THS Collections are separated and recorded in three distinct registers:

- Sports Accessions;
- Museum Accessions;
- and Archives Accessions (all textual records, multi-media, and photograph, and books/publications).

4.2 Additional collections and registers in and under the care, custody and/or management of the THS for the purpose of public access (and thereby receive the same consideration and treatment as the permanent Collections) include:

- Teck Cominco Textual Collection;
- Teck Cominco Photograph Collection;
- Colombo Lodge Archives;
- West Kootenay Power Photograph Collection;
- and West Kootenay Power Archival Collection.

5. ACQUISITIONS & ACCESSIONS

5.1 CRITERIA

Items are considered for acquisition on the basis of specific criteria, which include the following:

- Usefulness and purpose (as per the mission statement(s) and approved subject matter);
- Physical condition;
- Rare to the current Collections (not duplicated);
- Exhibition quality;
- Historical value;
- Established provenance;
- Custodial capacity (space, resources);
- Financial capacity to purchase (where necessary);
- Financial capacity to appraise for tax receipting purposes;
- And, most importantly, clear title.

5.2 TRANSFER

The transfer of ownership from a donor to the THS, via TMA staff, may be conducted through gifting (donation), bequest, or purchase; however, the process of transfer must include outright ownership and title to the THS. Any item acquired for accession into the

Collections must become the property of the THS, void of restrictions (unless legally or ethically necessary), and may be exhibited, loaned, retained or disposed of at the discretion of the Trail Historical Society, at the recommendation of TMA staff.

5.3 REFUSAL

Items considered for acquisition will be assessed thoroughly using the criteria per Section 5.1, with significant emphasis on custodial capacity that currently impacts the TMA and the THS, specifically with respect to storage. Should an item be considered too cumbersome or too great a burden on resources (financial or otherwise), the TMA and the THS would decline the donation. Considerable attention will be given to avoiding duplication in the Collections, which is grounds for refusal.

5.4 ACCEPTANCE

The final decision will ultimately lie with the THS. A monthly reporting schedule will ensure the Collections Coordinator reports accurately all temporary donations that meet the criteria per Section 5.1. The THS will instruct the Collections Coordinator to formally accept and accession temporary donations into the permanent Collections. The THS will adhere to the following guidelines:

- a. The item is useful to the mission of the THS and the TMA;
- b. The item is of a certain aesthetic quality, useful for research/scholarly endeavours, and possess historical and cultural significance in line with collection subject matter;
- c. The item is suitable for exhibition (where appropriate);
- d. The item requires little to conservation treatments;
- e. The item requires limited extraordinary preservation techniques/storage;
- f. Provenance is clearly established;
- g. The item does not duplicate another item in the Collections;
- h. The item is not bound by financial conditions (i.e. requires conservation treatment, costly appraisal for tax receipting purposes);
- i. Clear title has been established and is freely transferable by the donor;
- j. Formal documentation can be completed in a timely manner.

All formal records must be signed by the donor/title holder. Authorized TMA staff act as endorsed signatories on all gift agreements and transfer documents once an item is approved for acceptance by the THS.

6. DEACCESSIONING & DISPOSAL

Deaccessioning items from the Collections is not undertaken regularly, nor arbitrarily. It is, however, designed to ensure a clear collecting focus, reduce significant costs, and improve the overall effectiveness of the Collections and the mission(s).

6.1 CRITERIA

Items may be removed from the Collections for the following purposes:

- No longer/has never supported the mission of the THS;
- Does not meet the acquisition criteria;
- Duplicates another item/object within the Collections;
- Has deteriorated in physical or aesthetic quality beyond the threshold of reasonable conservation treatment;
- Cannot be stored adequately, safely, or cost effectively;
- Clear ownership is indeterminate.

6.2 DISPOSAL

Items approved for deaccessioning by the THS may be disposed of in the following manners:

- Transferal, without compensation, to a suitable repository (ideally locally);
- Destroyed, if the item is beyond the point of repair or if it poses a hazard to other items in the Collections or person (contamination);
- Returned to the previous owner (if stipulated on gift documentation);
- Sold at public auction.

Items must not be offered, given, or sold to any private individuals from within the THS, its committees, or its membership. The same policy applies to staff of the TMA and the City of Trail.

7. LOANS

The Collections of the THS may be considered for loan to peer institutions and organizations for the purpose of scholarly exhibition or educational use. Loan requests must be made in writing by the borrowing institution and submitted to the THS for review. Terms of the loan agreement will include:

- Borrowing and return dates;
- Proof of insurance by the borrowing institution (both liability and directors' insurance), valid throughout the duration of the loan;
- Transportation details;
- Purpose/nature of exhibition;
- Credit and visible recognition of the loan.

TMA staff will prepare a condition report prior to the transfer of the item(s). At no time may an item be cleaned or altered by the borrowing institution. Items must be returned as delivered. Any costs or necessary treatment incurred upon return as a result of negligence or damaged will be assumed by the borrowing institution.

8. OBJECTS IN CUSTODY

The recurring instance of complete abandonment of property (i.e. item donation) at the former offices of the THS in City Hall was difficult to combat. Items randomly abandoned at the TMA should not be considered for acquisition.

Objects in the custody of the THS and/or the TMA for a period of more than five (5) years without formal documentation (i.e. gift agreements) will be deemed the property of the THS once due diligence is performed to identify the rightful owner.

9. DOCUMENTATION

The THS currently retains basic information data on the current Collections. Formal documentation will accompany each and every acquisition and accession into the Collections. These include the following (responsibility indicated):

- Temporary Receipts (authorized TMA staff);
- Motion to Accept (Board of Directors, THS);
- Gift Agreement (authorized TMA staff);
- Validation/Acknowledgement Record (TMA staff);
- Accession Record (TMA staff);
- Condition Report (TMA staff).

Additional records may include:

- Outgoing Loan Agreements (authorized TMA staff and THS);
- Appraisal Reports (outsourced, where necessary);
- Inventory Records (TMA staff)

10. COLLECTIONS CARE

The care of the Collections is a joint responsibility between staff of the TMA and the THS. As the Collections are stored and exhibited at various locations, the responsibilities must be shared.

10.1 SPECIFIC RESPONSIBILITIES

It is the responsibility of the THS to ensure complete understanding of the Collections Policy in order to practice sound collections management. It is also the responsibility of the THS to ensure spaces outside of the regularly staffed TMA (i.e. Sports Hall of Memories) are monitored for damage, theft, or maintenance.

10.2 EXHIBITS AND ARCHIVES

Permanent, temporary and pop-up exhibits, as well as content within the archival vault and research room within the TMA are the responsibility of the TMA. Staff will routinely monitor the security, cleanliness, and maintenance of exhibits housing the Collections and remedy any issue that would negatively impact the Collections, the safety of staff or visitors, or either organization.

10.3 HANDLING

Professional standards, to the best of the abilities of all parties, will be applied to the handling of the Collections. With respect to the accessioning process, only authorized TMA staff may handle items within the Collections or access their corresponding records. In addition, access by the THS to any storage or exhibition locales outside of the TMA proper must be documented and shared with staff of the TMA. The same policy will apply to TMA staff.

10.4 CONSERVATION

Few pieces in the Collections require significant conservation treatment; however, any item in need of specific scientific treatment must be handled by a professional conservator should the item meet certain criteria for a potentially unforeseen expense.

11. ACCESS & USE

The entire archival collection (textual, photographic, multi-media, books and publications) is in the care, custody and management of the TMA. Aside from artifacts exhibited in the permanent galleries and the Sports Hall of Memories, the balance of the artifact register remains in storage in City Hall and in storage in the Trail City Works Yard.

11.1 ACCESS TO THE ARCHIVAL COLLECTION

Physical access to the archival collection is limited to the TMA staff and, with supervision, authorized appointees of the THS.

11.2 ACCESS TO THE ARTIFACT COLLECTION

Physical access to the Sports Hall of Memories and storage areas in City Hall and the Public Works Yard is limited to TMA staff and authorized appointees of the THS, both parties ensuring the other is aware of said access. No individual of the public may be left unaccompanied in either space. Locked and secured areas of those spaces must be restricted to appointed key bearers and monitored regularly.

11.3 ACCESS TO COLLECTION RECORDS

In order to uphold current privacy laws, legislation and the organizational Privacy Policy, no access (public or otherwise) will be granted to collection documentation, save authorized appointees of the THS and authorized staff of the TMA.

11.4 SAFETY AND INTEGRITY OF COLLECTIONS

The public will be granted reasonable archives access by appointment, established and monitored by the staff of the TMA.

No access will be granted to any individual (scholar, student, research, genealogist, etc.) who may compromise either the physical or intrinsic integrity of any aspect of the Collections. Access to the Collections will be granted during typical working hours and coordinated and

supervised by TMA staff. Extraordinary enquiries and requests will be brought to the attention of the THS immediately.

Use of the Collections for scholarly purposes or publication must be accompanied by a *Permission for Use* application, vetted and approved/denied formally by authorized TMA staff. Digital, high-resolution copies will be made available by TMA staff for a nominal fee, payable to the City of Trail. Any and all use of images provided must be published unadulterated and/or unaltered, complete with full acknowledgement of both the THS and the TMA, with a gratis copy of the publication (see *Permission for Use application for further conditions*).

Documents of a sensitive nature (i.e. records pertaining vital statistics or documents restricted by the donor) may be withheld from public view at the discretion of the TMA staff, with full consideration given to the nature of the enquiry or scholarly topic. This measure will ensure the privacy and wishes of the donor, uphold current privacy laws, or serve to protect living individuals. TMA staff will report any incidents where access is denied to specific documents to the THS. Any disputes with respect to access will be mediated jointly.

12. RISK MANAGEMENT

12.1 SECURITY

The Collections are currently divided between four (4) locales:

- Trail Museum & Archives (1505 Bay Avenue);
- Sports Hall of Memories (1051 Victoria Street);
- Trail City Hall (1394 Pine Avenue);
- Trail City Works Yard (3370 Highway Drive).

It is the responsibility of both custodians to mitigate threats of vandalism, theft, and damage through specific security measures and ongoing monitoring.

12.2 INSURANCE

As per the Memorandum of Understanding between the City of Trail and the THS, the City of Trail will wholly insure the Collections (both exhibited and in storage on City of Trail property) belonging to the THS. It is incumbent upon the THS to ensure accurate valuations are assigned to items in the Collections.

12.3 INVENTORIES

Inventories should be conducted every five (5) years to reconcile records and documentation with the corresponding item. This will also make certain that security measures and environmental controls are functioning appropriately and effectively. TMA staff will undertake inventories and accurately report to the THS any discrepancies between records and the Collections.

13. ADDITIONAL STEWARDSHIP ISSUES

13.1 COLLECTIONS MANAGEMENT

With the City of Trail assuming responsibility for the staffing and operational management of the TMA in the Riverfront Centre, all collections management, registrar duties and records management are undertaken by staff of the TMA. Any changes to this model must be readdressed in a review and revision process of the *Memorandum of Understanding* and agreed to by the City of Trail and the THS.

13.2 DECISION MAKING

TMA staff will act as trusted and principal advisors to the THS on matters pertaining to the acquisition and deaccessioning of Collections items. Authorized TMA staff assume a reasonable amount of license and discretion with respect to use and access of the Collections in their care and custody.

13.3 REPORTING

TMA staff will report monthly to the THS on matters requiring board approval (i.e. acquisitions, extraordinary requests), access to the Collections offsite, and any other matter of urgency pertaining to the Collections.

TMA staff will report annually to the THS any statistical data pertaining to the Collections, including visits, research enquiries, and extent of use (i.e. publications).

14. APPRAISALS, ITEM IDENTIFICATION, & RESEARCH SERVICES

14.1 APPRAISALS

Appraisals are required for the purpose of insurance and outgoing loan documentation and agreements. Professional, non-biased appraisers must be commissioned for this work on any item of value over \$1,000.00.

14.2 ITEM IDENTIFICATION

Artifact and/or document identification, where authenticity is in question, must be undertaken by a qualified professional. Endeavours to identify an item will be the responsibility of TMA staff.

14.3 RESEARCH & ARCHIVAL SERVICES

As per the *Memorandum of Understanding* and Operating Model, TMA staff will undertake all research-based services. All fees associated with this service will be incurred by researchers based on the current fee structure. Service revenue will be directed to the operations of the TMA.

15. POLICY REVIEW & REVISIONS

15.1 COMPLIANCE

Policy compliance is the responsibility of the THS and the TMA jointly.

15.2 REVIEW

Any party may recommend policy review when circumstances arise where further or amended detail within this document is necessary. All parties must approve recommended amendments.

15.3 REVISION

Following a review process and an assessment of recommended amendments, TMA staff will undertake the revisions. The revisions will be formally approved by TMA and the THS and subsequent versions of the Collections Policy will include the date of revision.