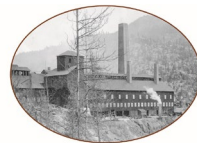


TRAIL MUSEUM & ARCHIVES

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
Revised JULY 2020
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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 1977, the name was changed to the Trail Historical Society. In that year, 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 Trail Riverfront Centre, the City of Trail assumed responsibility for staffing the delivery of museum and archives services. A Memorandum of Understanding signed in 2017 between the board of the THS and the City of Trail details the new relationship between the parties: the THS retaining ownership of the Collections and TMA staff delivering all heritage services within the Trail Riverfront Centre. Members of the THS remain active collaborators, contributors, and advisors to the City with respect to the Collections.

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. As a Canadian museum and archival repository, the TMA and THS will follow the codes of conduct and ethics developed by the Canadian Museums Association and Association of Canadian Archivists, respectively.

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

3. SCOPE OF COLLECTIONS

3.1 GEOGRAPHIC AREA

The Collections consist of historical textual documents, photographs, artifacts, multi-media, and digital records pertaining to the history of Trail, its people, and events. In some instances, the geographic scope broadens to include the Lower Columbia/South Kootenay region, and, on occasion, expands to the West Kootenay. Where collections and/or fonds necessitate the retention of content outside of the defined geographic area, exceptions may be considered.

3.2 TIMEFRAME

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

3.3 SUBJECT MATTER

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

- First Peoples¹
- Columbia River
- Early Settlement
- Municipal Issues (politics, infrastructure, core services)
- Demography (including immigration)
- Socio-Cultural Matters (including the Arts)
- Sports and Recreation

¹ Future consideration may be made for transfer to a sanctioned central repository for Indigenous content,

- Industrial and Commercial Heritage
 - Persons of historical interest and/or importance
- Items not relevant to the Collections will not be considered for accessioning in the Collections.

3.4 USE OF COLLECTIONS

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

4. CATEGORIES OF THE COLLECTIONS

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

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

4.2 Additional collections and registers in and under the care, custody and/or management of the TMA 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;
- Italo-Canadese Archives;
- West Kootenay Power Photograph Collection;
- and West Kootenay Power Archival Collection.

Custodial agreements were signed in 2023 between the Italo-Canadese and the City of Trail, as well as the Colombo Lodge and the City of Trail. These agreements define the terms of custody and responsibilities of both parties.

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 statements and approved subject matter);
- Physical condition;
- Rarity within the current Collections (not duplicated);
- Complementary and/or relevant to other items in the Collections
- 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 with signed documentation. Any item or digital file 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. Where possible, copyright should be identified.

5.3 REFUSAL

Items or digital files 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 will 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 approved acquisitions 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 no 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;
- k. Copyright has been identified

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

A collection element (artifact, archival record, digital file) may be deaccessioned if:

- It is outside and/or is irrelevant to the TMA and THS mission statements and Collection Acquisition Policy.
- It is duplicated in the Collections and other examples are sufficient or better-suited to the mission statements and Collections Acquisition Policy.
- It lacks physical integrity (inherent vice, incomplete, broken, poor or unsalvageable condition) and/or has deteriorated to the point where it is unusable or unsafe (for exhibition or research).
- There is a more appropriate repository for it at another institution.
- It has failed to retain its documentation or authenticity, or has been lost or stolen and remains lost for over five years.
- It was illegally or unethically attained.
- The expenses involved in its care and storage are costlier than its collection value, as it relates to the mission and activities.
- It is not an original historical or natural specimen.
- It is subject to legal and ethical standards (i.e. Repatriation).

Restriction: *In order to be considered for deaccession, full legal ownership of the object must belong the Trail Historical Society.*

6.2 DISPOSAL

In the best interest of the object, museum and public, deaccessioned collection elements may be disposed of in one of the following ways:

- It may be transferred to another internal collection (i.e. Education Collection, Didactic Collection).
- It may be transferred to another museum, library or public institution.

- It may be repatriated to a First Nation Community that has a legal claim to ownership of the object.
- It may be sold at auction outside of the Trail area, without invoking the names of the Trail Historical Society/Trail Museum & Archives or the accession number (removed upon deaccession).
- It may be destroyed (complete obliteration of object).
- It may be returned to owner if a tax receipt was NOT issued upon donation.

Restrictions:

- *Items shall not be given, sold or otherwise transferred, publically or privately, to museum employees, officers, trustees or their families or representatives.*
- *All proceeds resulting from the sale of deaccessioned collection elements shall be deposited to the THS Acquisition Fund, to be used only to better preserve the museum and archives collection.*
- *Collection elements will not be deaccessioned intentionally to provide funds for the THS or TMA.*
- *Collection elements shall only be destroyed if the object is unsalvageable or if it is of no interest to any of the above parties. Prior to the destruction of deaccessioned collection elements by physical or mechanical means, all identifying labels and accessions numbers must be removed. The destruction of collection elements must be witnessed and the means entered into the artifact Deaccession Record. The THS and TMA will not destroy any artifact of prime historical, cultural, or scientific value without the proper justification.*

7. LOANS

The Collections 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;
- Details of collections and exhibition management (including security and safety);
- 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 damage 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);
- Digital Database Record (TMA staff).

Additional records may include:

- Outgoing Loan Agreements (authorized TMA staff and THS);
- Appraisal Reports (outsourced, where necessary);
- Documentation/research proving provenance (TMA staff);
- Inventory Records (TMA staff);
- Deaccession 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 this Collections Management Policy in order to practice sound collections management.

10.2 EXHIBITS AND ARCHIVES

Permanent, temporary, and pop-up exhibits, as well as content within the archival vault and research room at City of Trail facilities 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. When staff resources are limited, the THS will be engaged to assess storage areas and off-site exhibits, like the Sports Hall of Memories.

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.

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. Conservation expenses are the responsibility of the THS.

10.5 ENVIRONMENTAL CONTROL

TMA staff will monitor and maintain temperature, relative humidity, pest control, and lighting levels of the archival vault. Artifact storage areas will be monitored to the best of staff ability to avoid drastic fluctuations in temperature, moisture, and light.

11. ACCESS & USE

The entire archival collection (textual, photographic, multi-media, books, publications, and digital records) is in the care, custody, and management of the TMA. Digital content care is supported by the City of Trail IS department. 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 at Endless Horizons Storage in Genelle, BC.

11.1 ACCESS TO THE ARCHIVAL COLLECTION

Physical access to the archival collection is limited to the TMA staff and, with supervision, authorized designates of the THS. City of Trail maintenance may, from time to time, require supervised access. At no time should a researcher or member of the public have access to the archival collection, unless accompanied by TMA staff and with valid reason, like a supervised tour. Digital access is limited to TMA staff and the City of Trail IS department.

11.2 ACCESS TO THE ARTIFACT COLLECTION

Physical access to the Sports Hall of Memories and storage areas in City Hall and the Genelle storage facility is limited to TMA staff and authorized THS designates, 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 City of Trail's Privacy Policy, no access (public or otherwise) may 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 Collections 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 containing vital statistics or documents restricted by the donor) will 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 Regional Airport (9019 Hwy 22A)

- Trail City Hall (1394 Pine Avenue);
- Endless Horizons Self-Storage (875 China Creek Rd, Genelle)

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 2017 Memorandum of Understanding between the City of Trail and the THS, the City of Trail will wholly insure only the Collections (both exhibited and in storage) 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 Collections. 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 Trail 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, deaccessioning), 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), and acquisition totals.

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 \$999.00, including for tax receipting

Appraisals are also vital for accurate insurance coverage. Appraisals will be conducted on the advice of TMA staff and funded by the THS. All appraisal documentation is shared with City of Trail administration, overseer of insurance policies.

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. Expenses associated with identification is the responsibility of the THS.

14.3 RESEARCH & ARCHIVAL SERVICES

As per the *Memorandum of Understanding*, TMA staff will undertake all research-based services. All fees associated with this service will be incurred by researchers based on the current fee bylaw. 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 consideration or amended detail 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 Management Policy will include the date of revision.