

# **Mandate and Acquisition Policy for the Salt Spring Island Historical Society Archives**

## **1. Mandate**

The Salt Spring Island Historical Society administers the Salt Spring Island Historical Society Archives (the Archives) under the direction of the Archives Manager. The Archives is a repository of information for Salt Spring Island.

The mandate of the Archives is to collect and preserve archival materials that

- *illustrate the growth and development of Salt Spring Island; or*
- *that pertain, in whole or in part, to activities within the boundaries of the Salt Spring Island Local Trust area.*

## **2. Acquisition Policy**

### **2.1 Geographical Area**

The Archives acquires materials that pertain in whole or in part to activities within the boundaries of the Salt Spring Island Local Trust area.

### **2.2 Archival Material**

The Archives acquires both public and private records by gift or bequest and is held in trust for future generations. To this end, the historical collection includes textual records, photos and other visual records, maps, plans, architectural records, sound recordings, and oral history tapes.

In accordance with the Resource Binder for Small Archives (ANLA 1998), "Archival materials are usually original, unique and unpublished items, which are judged to be of permanent significance. They are non-current records that document the activities of an individual or an organization. They are preserved because they illustrate issues of administrative, legal, historical or cultural significance."

Although various materials are potentially archival, all records are not maintained simply because they are "one of a kind" or old. Archivists appraise materials to determine their value to users. Appraisal will determine whether potential donations fall within the mandate of the Archives.

### **2.3 Disposition of Non-Archival Materials**

Material that is not considered to be archival in nature may, with the permission of the donor, be passed on to an appropriate repository.

## **2.4 Modes of Acquisition**

The Archives acquires materials through the receipt of gifts or through loans. All acquisitions must be accessioned in accordance with the Accessions Policy of the Archives.

## **2.5 Gifts**

The receipt of outright gifts is the preferred mode of acquisition for the Archives for the following reasons:

- ❑ It is the simplest legal arrangement.
- ❑ It enables the Archives to ensure permanent public access to the material (in accordance with its mandate).
- ❑ The permanent storage in the Archives of the donated material will likely extend its life.

## **2.6 Loans**

Material may be accepted on a predetermined, short-term basis when offered to or requested by the Archives for the purpose of exhibition or duplication. Due to the legal issues involved, the Archives Manager (or designate) must personally authorize each loan.

## **2.7 De-accessioning**

In some cases, material in the Archives' holdings may fall outside of the guidelines of this policy. In such cases, it may be desirable to remove said material from the Archives' holdings. If the material has already been accessioned, then the material must be formally de-accessioned in accordance with the Accessions Policy. Disposal of de-accessioned material must follow the disposal instructions that were determined during the accessioning process. Where no disposal instructions have been specified by the donor, the Archives Manager (or designate), after consultation with the Accessioning Committee, has the authority to destroy, return, transfer, or donate de-accessioned material. A written record will be maintained at the Archives outlining the de-accessioning of all materials.



## **APPRAISAL**

***Appraisal is the process of determining the archival value of possible acquisitions, and their suitability to your institution.***

### **WHY APPRAISAL?**

#### **1. MANDATE OF THE ARCHIVES**

Appraisal determines whether potential donations fall within the mandate of the archives. A mandate is complemented by an ACQUISITIONS POLICY which carefully details the types of records accepted, and the content (or subject) of the records.

#### **2. VOLUME OF RECORDS**

An archives can not <sup>accept</sup> retain all materials transferred or donated to the institution.

#### **3. ACCESSIBILITY OF RECORDS**

If the volume of materials is too great, the archivist(s) cannot adequately examine, arrange and describe the records. If the records are unprocessed, access to the materials by researchers must be restricted.

#### **4. SPACE CONSIDERATIONS**

Because properly monitored space is expensive and relatively scarce for most archival institutions, appraisal is necessary to identify the significant materials.

#### **5. USER NEEDS**

*Researchers require reliable and accessible information. Appraisal identifies significant materials, reduces unnecessary retention and expedites access.*

## DETERMINING VALUE

When a collection comes to the archives and we are set with the task of deciding what to keep and what not to keep the following questions are important to ask of ourselves:

□ ***Administrative Value***

Important administrative documents include mission statements and mandates, official minutes, policy and procedures manuals.

□ ***Legal Value***

Important legal documents include enabling legislation, acts of incorporation, registration (companies and trade unions), deeds and wills.

□ ***Fiscal Value***

Some fiscal records are routine housekeeping (invoices, work orders) while others are significant papers of lasting value. Important fiscal records include accounting procedures, financial statements, financial reports and ledgers.

□ ***Historical and Cultural Value***

How can historians, demographers, genealogists and others use these records?  
This is often of the most importance to the users of an archives.

To sum up, appraisal is subjective. Archivists differ on collecting strategies and the wisdom of predicting future research interests. A ***formal acquisition policy*** and ***periodic reevaluation*** encourages archivists to question their collecting priorities.

## **The Rubber Hits the Road!** **(aka Pack Rats Prepare Yourselves!)**

Useful guidelines when considering potential donations:

### **1. Age**

An old document or photograph may not necessarily be significant. If an item is undated or unsigned, its information content may be of little or no value. If the photograph has had extensive water, insect or mould damage, its archival value may not warrant expensive conservation measures. Age may detract rather than enhance archival materials.

A more useful criteria may be **rarity**.

### **2. Uniqueness**

*Does the acquisition consist primarily of duplicates generated by other administrative levels or by other agencies?*

When appraising a potential acquisition, determine if the materials are original. The archivist must know if and where the originals have been preserved. If duplicates, does the material have additional information which alters its informational content or is it an attachment to another record.

*Is the information found in other sources, or in a published format?*

### **3. Quantity**

You must determine whether your archives can afford a large acquisition. If there is not enough space or enough staff to do a proper appraisal or to catalogue the items, perhaps it should go to a larger repository.

### **4. Medium**

Information may be recorded on a variety of physical material – paper, parchment, film, magnetic tape or electronic record. Many of these types of material are fragile and require expensive storage space and preservation measures.

### **5. Integrity of Fonds**

Does another archives hold records by the same creator? When possible, it is important to avoid dividing collections or fonds among institutions.

### **6. Client Use**

Would researchers consider our archives as the natural custodian?



## **Methods of Evaluation and Selection**

1. Eliminate duplicates.
2. Separate the archival and non-archival material  
If possible, transfer non-archival material to an accredited museum, library or heritage centre.
3. Consider sampling  
For example:  
Chronologically: retain one year out of ten  
Alphabetically: retain surnames commencing with certain letters  
Regionally: retain records pertaining to a certain area or region

## **Re-Appraisal and De-accessioning**

Recently, archivists have accepted that systematic, on-going reappraisal of past acquisitions is essential in developing accessible holdings which reflect the archives' mandate and which maximize scarce preservation monies. If the reappraisal determines that the specific items or fonds are not of archival value or that they fall outside the mandate of the institution, the archivist removes these materials permanently from the repository.

## **Standard Questions**

1. Does the material fall within the scope of the current acquisitions policy?
2. If the material is outside the mandate of your archives, is it better suited to another institution?
3. Has the material deteriorated beyond real usefulness?
4. Does our archives have proper storage space for the materials? If not, is there a provincial repository which can preserve the originals and provide you with copies for client use?
5. Are these archival materials used by your clientele?

## **What are the Options when De-accessioning?**

1. **Transfer** to a more appropriate archives, library or heritage centre.

### **2. Sale**

Many archivists do not suggest sale of items as it creates dangerous precedents.

#### **Important to Remember:**

- ❑ De-accessioned material may not be sold to archival staff or their immediate families.
- ❑ Proceeds from the sale of de-accessioned materials shall be used to preserve or to develop archival holdings.

### **3. Return items to the donor or the successors**

#### **Important to Remember:**

Donors may be insulted that their contribution is not being valued. This is why it is so important that documents be signed and donors be made aware of the possibility of de-accessioning.

### **4. Destruction**

If the materials are of no archival value and we have explored the above options, we may decide to destroy the de-accessioned items according to accepted institutional procedures. Before destroying the items, however, consider if they may be used for exhibits, display tables or school tours.

**We must carefully document all records destroyed, indicating the reasons, the date and if possible, have a witness.**





## GIFT AGREEMENT

Received from: Mr., Mrs., Miss \_\_\_\_\_

Received from: Mr., Mrs., Miss \_\_\_\_\_

Surname

First name

Surname

Postal Address \_\_\_\_\_

Postal Address \_\_\_\_\_

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

Telephone \_\_\_\_\_

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

The Salt Spring Island Archives gratefully acknowledges receipt of the objects listed below:

Accession Number \_\_\_\_\_

Accession Number \_\_\_\_\_

Description and condition of documents(s):

Description and condition of documents(s):

Restrictions

Restrictions

I, the undersigned, being the lawful owner of the objects listed above, hereby transfer by gift/sale my full title to and interest in the same to the Salt Spring Island Archives forever. The Salt Spring Island Archives shall hereafter have and retain exclusive and absolute physical ownership of the object(s). Copyright is transferred to the Salt Spring Island Archives and moral rights to this material are extinguished unless otherwise indicated. Archival material may be placed, loaned, or disposed of in such a manner as the Salt Spring Island Archives may deem advisable in accordance with Archives policy. The Salt Spring Island Archives will display the object(s) if and when it deems feasible. Gifts are deductible for income tax purposes.

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

Accepted on behalf of the Salt Spring Island Archives

Date \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

Objects &amp; archives not retained by the Salt Spring Island Archives are to be disposed of in the following manner:

Returned to donor \_\_\_\_\_

Sold for fundraising \_\_\_\_\_

Transferred to other institution \_\_\_\_\_

Initial \_\_\_\_\_

Name of Institution \_\_\_\_\_