Heritage Abbotsford Society Archives Policy[1] and Procedures

Original created by Anneleen van Dijk, 2014-05-04
Last Updated on 2021-12-15

---

[1] 1[1] Policy template used is the Maple Ridge Museum and Community Archives' "Archives Policies and Procedures Manual_Draft_v.3" written by Kelly Stewart.

Table of Contents
Archives Policy:

1.0   Statement of purpose

The Heritage Abbotsford Society, hereafter referred to as "the Society", organized under the Societies Act of BC, Reg. # S-16269, has been created to collect, preserve, research, exhibit, and interpret all those artifacts that best serve to illustrate the culture, founding, settlement and development of the entire district now known as the City of Abbotsford from settlement up to and including artifacts older than 40 years from the current date. The Mission of the Society is to collect, record, preserve and share the stories of Abbotsford. Functions of this mandate are to preserve, study and exhibit artifacts, and to educate and entertain the public.
The purposes of the Society are:

a. To maintain and operate a community museum and Heritage House based on a collections policy reflecting the history and development of the Abbotsford region, including collection, exhibition, conservation and preservation of artifacts, archives, heritage buildings and sites.

b. To enhance public understanding and preservation of the history and development of the Abbotsford region.

c. To work with the City of Abbotsford, its citizens and organizations to support and enhance heritage resources and programming.

d. To stimulate public interest and encourage historical research in local history.

e. To provide advocacy for heritage issues on behalf of the City of Abbotsford, its citizens and/or organizations.

The purpose of the Heritage Abbotsford Society Archives, hereafter referred to as "the Archives", as a part of the Society, is to identify, acquire and preserve material of archival and/or informational value relating to the history and development of the Abbotsford region and to make such records available to the public.

2.0 Acquisition policy

2.1 Geographical area
The Archives acquires material created in, imported to, or directly concerning the Abbotsford region.

2.2 Material
The term "material" is defined as any kind of recorded information, regardless of physical form or characteristics. "Material" includes, but is not limited to, documents, records, photographs, films, machine readable magnetic and optic media, published and unpublished manuscripts, maps, plans, and sound recordings.

The Archives acquires material of archival and/or informational value. Material acquired by the Archives is classified as either "archival" or "non-archival (reference)" material.

2.2.1 Archival material
Archival material is 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 their continuing value. These records provide evidence of the activities of their creator in carrying out his/her/its everyday affairs. Examples of archival material include, but are not limited to, letters, journals, scrapbooks, photographs, etc.

2.2.2 Non-Archival (reference) 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. Non archival material includes, but is not limited to, published materials such as books, magazines, pamphlets, sheet music, etc.

Some materials which may not have provenance to the Abbotsford region but do provide informational or historical context may be added to the educational collection as articulated in the Society's Collections Policy.

The Society also collects and makes accessible library materials such as reference books dedicated to the history of the Abbotsford region and its environs.

2.3 Modes of acquisition

Material is acquired by the Archives through the receipt of either gifts or loans, or by purchase. Each acquisition must be documented. All acquisitions must be accessioned in accordance with the Accessions Policy (section 3 of this document).

2.3.1 Gifts

The receipt of outright gifts is the preferred mode of acquisition for the Archives for the following reasons. First, it is the simplest legal arrangement. Second, it enables the Archives to ensure permanent public access to the material. Third, permanent storage in the Archives will likely extend the life of the donated material.

2.3.2 Loans

Incoming Loans:
Material may be accepted on a pre-determined, short-term basis when offered to or requested by the Archives for the purpose of exhibition or duplication. No material shall be accepted for long

term (more than 1 year) or permanent loan without the explicit recommendation of the Archivist. All loan transactions shall be for a contractually agreed upon (specified) period of time with options for renewal.

Outgoing Loans:
Material may be loaned or borrowed by other institutions or organizations for specific display or study purposes for a specified period of time, not to exceed one year. Applicable environmental conditions (contractually outlined by the Archivist) must be met and materials must be displayed in secure, locked cases or be accompanied by a staff member or trained docent.

If unusual restrictions are placed on a proposed incoming or outgoing loan the Archivist must approve the loan. Materials will not be loaned or taken in on loan if it is doubtful that they can withstand travel, climate changes and/or the circumstances of exhibition. The Archivist has the responsibility to monitor a loan. All materials loaned for reproduction in print or for the enhancement of an organization or commercial establishment shall be on the basis that the Society will be acknowledged as the owner and source of the material. This acknowledgment shall preferably be in print.

2.3.3 Purchases
Material may be acquired for the Archives by purchase through funds from the Acquisition Fund. The Archivist may recommend material for purchase, which must be approved by the Executive Director.

2.4 Disposal of Acquired Material
In some cases, material in the Archives holdings may fall outside the guidelines of section 2.1 and 2.2 of the Acquisition Policy and/or other current Archives policy. In such cases, it may be desirable to remove said material from the Archives holdings or transfer the material to the Educational Collection. If the material has already been accessioned, then

the material must be formally deaccessioned. Disposal of deaccessioned material must follow the disposal instructions that were determined during acquisition. Where no disposal instructions have been specified by the donor, the Archivist has the authority to destroy, return, transfer, sell or donate deaccessioned material. In all cases, the decision to deaccession and dispose of material in the Archives holdings rests with the Archivist and an appropriately trained member of staff. Any funds received from the sale of material are to be deposited in an Acquisition Fund and these funds are to the used exclusively for the purchase of material for the Archives.

3.0   Accessioning Policy

3.1   Each acquisition must be accessioned. Care must be taken to document each accession ensuring that relevant information regarding the provenance of the material is not lost. Each accession must be documented, first with a temporary custody receipt and then through the creation of an accession record.

A deed of gift form must be signed by the donor and the Archivist, providing a description of the gift and transferring ownership of the material to the Society. The Deed of Gift form (once signed) becomes the Society's document of ownership.

The Archives will only accession material for which it can provide proper care and may refuse to accept material encumbered with conditions imposed by the donor regarding use or future disposition. Income tax receipts for donations will only be issued to donors accepting the responsibility of providing an independent appraiser to determine the value of their donation.

4.0   Arrangement and Description

4.1   Arrangement

4.1.1   A fonds must be accessioned before it is arranged.

4.1.2   Arrangement proceeds from the general to the specific.

4.2.1   Arrangement is based on the principles of respect des fonds and respect for original order.

4.3.1   The Archives recognizes 5 levels of arrangement: repository, fonds, series, file, and item.

4.2   Description

4.2.1   Arrangement precedes description.

4.2.2   The Archives recognizes 7 levels of description: repository, thematic group or collection, fonds, series, sub-series, file, and item.

4.2.3   The Archives uses the Canadian Archival Standard *Rules for Archival Description* as its descriptive standard.

5.0   Access

5.1   The Archives is open to researchers during set times determined by the Executive Director or designate, or by appointment.

5.2   All researchers must register, providing their name, address, signature, and their research topic.

5.3   The Archives will not divulge to others the researcher's name, personal information, or the subject he or she is researching without the researcher's permission.

5.4   Researchers are granted access to all finding aids (or records created in PastPerfect) and reference material and to holdings which are not

restricted by law or regulation, or by agreement made by the Archives with the creator and/or donor of the records.

5.5   Researchers must abide by the terms of access and the regulations governing the use of the archival facilities and records. Access may be restricted to a researcher if it is determined that the materials will be physically abused or used in a libelous or otherwise illegal manner. The Archives may restrict access to records that invade the privacy of individuals, contain libelous or defamatory statements or allegations, are unprocessed, or are in fragile or poor condition. For records in fragile or poor condition, the Archives will attempt to provide research copies whenever possible.

5.6   Copies of archival records or reference material for private study only will be made under the fair use provisions of the Copyright Act. Copies of records are not to be further reproduced, sold, or published without the permission of a representative of the Archives.

5.7   Researchers are permitted to quote the text of records for private research and study, within the fair use provisions of the Copyright Act. If the research results in publication, researchers are expected to identify the records and acknowledge the Archives.

5.8   Costs related to the reproduction of material will be passed on to researchers. A schedule of fees will be made available to users.

Heritage Abbotsford Society Archives Procedures

1.0   **General**

It is the responsibility of the Archivist or designated staff member to ensure that materials donated to the Heritage Abbotsford Society Archives, hereafter referred to as "the Archives" are acquired, arranged and described, and cared for in accordance with the Archives Policy.

2.0   **Acquisition Procedures**

2.1 Gifts

When material is offered to the Heritage Abbotsford Society, hereafter referred to as "the Society", for donation, assess the material to determine whether it meets the Society's mandate and complies with the Archives policy.

> **2.1.1** If the material offered meets these requirements, then proper care must be taken to ensure the donation is documented. Complete a Temporary Custody   receipt (on paper or in the PastPerfect catalogue), including relevant information regarding provenance, provided by the donor or depositor (if different).
>
>> **2.1.1.1** Make 2 copies of the Temporary Custody receipt.
>>
>> **2.1.1.2** Give one copy to the depositor.
>>
>> **2.1.1.3** Place the other copy with the donation.
>>
>> **2.1.1.4** File the original receipt

> **2.1.2** If the offered material does not meet these requirements, return the material to the donor.

2.2 Loans
Incoming Loans

2.2.1 Create a catalogue record in the PastPerfect catalogue and assign a unique loan number to the incoming loan. Enter a description of the loan and follow the instructions regarding the cataloguing of incoming loans in the PastPerfect Museum Software manual.

2.2.2 Generate a loan agreement, print, and sign two copies. When the lender has signed and returned one copy, file this original.

2.2.3 It is the duty of the Archivist to monitor the loan and to follow the terms outlined in the loan agreement.
2.2.4 Once the loan period is complete, update the catalogue record and follow the instructions regarding the returning of loans in the PastPerfect Museum Software manual

Outgoing Loans
2.2.5 Create a catalogue record in the PastPerfect catalogue and assign a unique loan number to the outgoing loan. Enter a description of the loan and follow the instructions regarding the cataloguing of outgoing loans in the PastPerfect Museum Software manual.

2.2.6 Generate a loan agreement, print, and sign two copies. When the borrower has signed and returned one copy, file this original.

2.2.7 It is the duty of the Archivist to monitor the loan and to pack materials loaned and prepare them for transport.

2.2.8 Once the loan period is complete, update the catalogue record and follow the instructions regarding the returning of loans in the PastPerfect Museum Software manual

2.3 Purchases
Care must be taken to document all purchases and file all records created by the Archivist or Executive Director.

2.4 Disposal of Acquired Material

2.4.1. After receiving approval to deaccession material, update the applicable catalogue record(s) by following the instructions outlined in the PastPerfect Museum Software manual.

2.4.2 If applicable, follow the disposal instructions that were determined during acquisition.

2.4.3 If the material is to be returned, transferred, sold, or donated, make sure to remove any identifying numbers that connect the material to the Heritage Abbotsford Society.

3.0   Accessioning Procedures

3.1 After receiving approval to accession materials, create an accession record in the PastPerfect catalogue.

Note: Some donations may contain artifacts, ephemera[2], as well as archival material. Although these will be stored and described separately, they should still be linked together in the accession record as they originate from the same donor and may provide meaning to each other.

3.1.1 Provide a description of the accession. For very large donations it may be necessary to create a file list or inventory in Microsoft Word and to link it to the Accession Record using the Multimedia tab in PastPerfect.

3.1.2 Assign an accession number to the material.

3.1.3 Generate a Thank You Letter and 2 copies of the Deed of Gift. Sign both copies and send them with the Thank You Letter to the donor.

3.1.3.1 When the donor has signed and returned one copy of the Deed of Gift, file this original.

---

[2] Transitory material not intended to be kept or preserved. E.g. train or bus tickets, pamphlets, brochures, programmes, advertising leaflets or booklets, bookmarks, greeting cards.

3.2 Process the materials.

3.2.1 Remove paper clips, metal fasteners, elastic bands, etc.

3.2.2 Gently remove surface dirt.

3.2.3 Flatten materials and place in acid free file folders, envelopes, and boxes.

3.2.4 Place the materials in Archives storage.

3.2.4.1 Record the locations of the stored materials in the accession record.

4.0   Arrangement and Description Procedures

4.1 Determine if you are describing archival or non-archival (reference) material. If describing non-archival (reference) material make sure to assign the material with an appropriate ID number (especially for material in the Educational Collection).
4.2 Determine if you are describing a fonds, collection or single item

4.2.1 If you are describing a fonds go to 4.3

4.2.2 If you are describing a collection go to 4.4

4.2.3 If you are describing a single item go to 4.5

4.3 Arrange and describe the fonds.
4.3.1 Identify the series in the fonds by determining the original order of the creator (filing system, subject, alphabetical order, etc).

4.3.2 If there is no original order impose one by identifying the main activities of the creator and arranging the records according to those activities. You can also use the subject or format (medium) of the records.

4.3.3 Create a record in the Archives Catalogue (in PastPerfect) for the fonds and assign it an ID number. Describe the fonds, using the Canadian Archival Standard *Rules for Archival Description*.

>**4.3.3.1** For multi-level description, including series, sub-series, files, and items, follow the instructions in the PastPerfect Museum Software manual. It may be necessary (and preferable) to create a finding aid in Microsoft Word and to link it to the Archives catalogue record using the Multimedia tab.

>>**4.3.3.1.1** Do not repeat information at a lower level of description that has already been provided at a higher level of description.

>**4.3.4** Accruals

>>**4.3.4.1** A fonds may be donated in bits and pieces over time. It is possible to have many different accessions (or accruals) which belong to the same fonds (same creator). Describe these accruals together with the rest of the fonds; do not separate them as individual, unrelated accessions.

4.4 Describe the Collection

>**4.4.1** Create a record in the PastPerfect Archives/Library/Photos Catalogue (depending on the material) and assign the collection with an ID number. Describe the collection, using the Canadian Archival Standard *Rules for Archival Description.*

4.4.1.1 Use the term "collection" in your title instead of "fonds". If relevant, include a qualifier that indicates the type of collection being described. For example, Jane Smiths' royalty collection or David Jones' postcard collection.

4.4.1.2 For multi-level description, including series, sub-series, files, and items, follow the instructions in the PastPerfect Museum Software manual. It may be necessary (and preferable) to create a finding aid in Microsoft Word and to link it to the catalogue record using the Multimedia tab.

4.4.1.2.1 Do not repeat information at a lower level of description that has already been provided at a higher level of description.

4.5 Describe the Item

4.5.1 For a photograph(s), create a record(s) in the PastPerfect Photos Catalogue and assign the photograph(s) with an ID number and photograph number. Describe the photograph(s), using the Canadian Archival Standard *Rules for Archival Description* and follow the instructions regarding the functions of the Photos Catalogue in the PastPerfect Museum Software manual.

4.5.1.1 Write the assigned photograph number on the back of the photograph in pencil.

Note: For preservation reasons, it may not always be possible or preferable to write on the back of the photograph. In this case, write the number on the envelope/file folder enclosing it.

4.5.2 For other single items (e.g. maps, sound recordings, moving images, textual records, compact discs), enter them in the

appropriate catalogue and assign them with an ID number. Describe the item using the Canadian Archival Standard *Rules for Archival Description* and follow the instructions in the PastPerfect Museum Software manual for the applicable catalogue.

4.5.2.1 With a pencil write the ID number on the back of the item or on an unobtrusive part of the item.

Note: For preservation reasons, it may not always be possible or preferable to write on the back of the item. In this case, write the number on the envelope/file folder enclosing it.

5.0 Reference and Access Procedures

5.1 When meeting with a researcher, explain the rules governing the use of the Archives.

5.2 Provide the researcher with a registration form where he/she can record their name, address, signature, and research topic.

5.3 Make finding aids, inventories, indexes, and reference material available to the researcher.

5.4 To prevent accidental mixing of materials, limit the amount of material delivered to the researcher at one time.

5.5 Monitor the researcher's use of the material and once the researcher has completed his/her research, make sure the material is returned to its permanent location.

5.6 If a researcher requests that material be reproduced, the applicable fee must be collected first.

6.0 Definitions[3]

6.1 Accession

The formal acceptance into custody and recording of an acquisition.

6.2 Accrual

An acquisition of archival material which belongs to a unit of archival material in the custody of the repository.

6.3 Acquisition

An addition to the holdings of a repository.

6.4 Arrangement

The process and results of the analysis and identification of documents, in accordance with archival principles, undertaken with the aim of achieving different types of control (e.g., intellectual, physical, etc.).

6.5 Collection

A grouping of documents of any provenance intentionally assembled on the basis of some common characteristic.

6.6 Description

The recording in a standardized form of information about the structure, function and content of records.

6.7 File

An organized unit of documents, usually within a series, brought together because they relate to the same subject, activity, or transaction.

6.8 Fonds

The whole of the documents, regardless of form or medium, automatically and organically created and/or accumulated and used by a

---

[3] Definitions taken from Appendix D: Glossary, *Rules for Archival Description,* Revised Version, July 2008.

particular individual, family, or corporate body in the course of that creator's activities or functions.

Note: [...] that part of a fonds that is actually present in the repository is what is described at the fonds level of description. A fonds is not equivalent to an accession. A fonds may contain two or more accession units; similarly, an accession may contain more than one fonds.

6.9   Item
An archival unit that can be distinguished from a group and that is complete in itself.

6.10   Provenance
The person(s), family (families), or corporate body (bodies) that created and/or accumulated and used records in the conduct of personal or business life. See also Respect des fonds.

6.11   Record
A document made or received in the course of the conduct of affairs and preserved.

6.12   Respect des fonds
The principle that the records of a person, family or corporate body must be kept together in their original order, if it exists or has been maintained, and not be mixed or combined with the records of another individual or corporate body. See also Provenance.

6.13   Series
Documents arranged systematically or maintained as a unit because they relate to a particular function or subject, result from the same activity, have a particular form, or because of some other relationship arising out of their creation or, arising out of their receipt and use.

Policy adopted on:

Executive Director:

Board President:

Last updated: