

## 1. AUTHORIZATION

1.1 Under the terms of the Lease Agreement between the City of Vernon and the Society of March 28, 1977 and subsequently updated to March 2037, the Society was given the right to use the O'Keefe Ranch inventory for the term of the Ranch Tenancy. Any disposition of the original collection will require the approval of the City of Vernon. The society is required to maintain and care for the O'Keefe Ranch Inventory and to exhibit and display the historical artifacts on the O'Keefe Ranch grounds in a manner designed to accommodate, educate and entertain the public.

1.2. Through its Constitution, the Society establishes the right to acquire and maintain artifacts through donation, purchase and loan.

## 2. ACQUISITION

2.1. It shall be the responsibility of Management, Curator and Staff, as agents of the Society, to obtain and keep accurate records of artifacts and the condition of their acquisitions; and to evaluate artifact's significance and quality when proposed for acquisition or for removal from the collection.

2.2. All accessions to the collection shall have direct bearing on one or more of the component themes of the O'Keefe Ranch & Interior Heritage Society as identified in strategic plans.

2.3. All accessions shall adhere to one or more of the component time frames indicated below:

2.3.1. O'Keefe family artifacts, photographs and textual documents may be accepted dating up to 1977 with primary emphasis on the occupancy of Cornelius O'Keefe (1867-1919);

2.3.2 Domestic General Store artifacts may be accepted dating up to fifty years prior to the current date;

2.3.3. Items reflecting North Okanagan history (non-agricultural) may be accepted dating up to fifty years prior to the current date;

2.3.4. Agricultural artifacts, including tools, may be accepted dating up to fifty years prior to the current date;

2.3.5 Interior provincial ranching and heritage items may be accepted dating up to thirty years prior to the current date;

2.3.6. Ethnological artifacts may be accepted from the pre-historical to the present eras, but shall be restricted to those items relating to the Syilx and Secwepemc Nations.

2.4. All accessions shall have a direct relationship to historical development within the North Okanagan.

2.5. Acquisitions shall be recommended by the curatorial staff, and then be subject to a review by the Curatorial Committee, consisting of Management, Curator and at least two directors, before any accession is accepted. Such reviews shall be conducted as and when required. Any material found to be inappropriate may be:

2.5.1 directed to a bona fide museum upon consent of the owner/donor, or

2.5.2 refused by the Curator and Committee and not subsequently directed to another institution

2.6. No artifacts will be accepted with qualifications without Curatorial Committee and Board approval. Valid title to an artifact shall be available or obtainable free and clear of restrictions and/or qualifications before it can be accepted into the collection. If restrictions or qualifications are unavoidable and acceptable, a time limit of one year on such restrictions shall be imposed and noted as part of the artifact's documentation.

2.7. Acquisitions are subject to the laws of Canada and the Province of British Columbia and no acquisition shall be knowingly made which contravenes such laws.

2.8. Donations may be accepted at the discretion of the Curatorial Committee, if they meet the requirements for acquisitions and will become the full legal property of the O'Keefe Ranch and Historic Society or the City of Vernon if added to the original collection.

2.8.1. Donations will be recognized with a letter of appreciation.

2.8.2 Upon the request of the donor, the value of artifacts shall be recognized for the purpose of income tax deductions. Appraisals for items over \$1,000 should be independently obtained in writing from a qualified source. Appraisals up to \$1,000 can be made in-house by the Curator with approved documentation. At the discretion of the Curatorial Committee such appraisals may be paid for by the Society. Possession of a valid receipt of purchase by the donor, dated within two years of original purchase, may be an acceptable substitute for appraisal.

2.8.3 Donations that require a tax receipt over \$1,000 in value will require an independent appraisal at the cost of the donor.

2.9. Articles that have been identified as being required for display purposes may be purchased. Any such articles valued over \$200 are subject to the prior recommendation of the Curatorial Committee and approval of the Board.

2.10 Objects shall not be accepted or otherwise acquired unless they can be provided a reasonable standard of care. Storage, exhibition, and conservation of the artifacts must be subject to certain minimum museum standards to be established by Management and approved by the Board of Directors.

2.11 All proposed acquisitions that qualify for a charitable donation receipt must be reviewed by Management and subsequently presented to the Curatorial Committee with a recommendation from Management or their designate.

### **3. LOANS**

3.1 The Society may borrow artifacts from individuals and institutions but only for a specific purpose and a limited time period.

3.2 Loans may be made to other individuals and institutions for specific reasons and for a limited time only and in compliance with the following sections.

3.3 All loans shall be approved by the Curatorial Committee and shall be adequately documented.

3.4 All artifacts on loan to or from the Society shall be provided adequate insurance coverage.

#### **4. STORAGE AND PRESERVATION**

4.1 It is acknowledged that preservation of the collection shall be an important aspect of the Society's mandate.

4.2 Wherever possible, necessary artifact preservation work shall be undertaken at O'Keefe Ranch. Every effort shall be made to employ adequate museum standards of preservation wherever artifacts are displayed, stored or otherwise dealt with.

#### **5. DEACCESSIONS**

5.1 All artifacts presently contained in the collection shall be subject to the following conditions. Artifacts to be retained shall:

- 5.1.1 have a direct bearing on one or more of the component themes of the O'Keefe Historic Ranch;
- 5.1.2 adhere to one or more of the time periods defined in the components;
- 5.1.3 have a direct bearing on development within the geographical boundaries of the North Okanagan;
- 5.1.4 shall be in a reasonable state of repair or restorable to acceptable standards. Multiple copies of artifacts shall only be retained for replacement purposes, for a travelling exhibition, or for in use in exhibitions at the Ranch. Multiple copies will be reviewed periodically to ensure they are still required.

Those artifacts that do not conform will be subject to the de-accessioning process.

5.2 Notwithstanding clause 5.1, all artifacts accepted to inventory of the Society (items donated after 1977) may be considered by the Board for de-accession. Any number of reasons such as inability to provide acceptable level of care or the availability of a superior copy will be considered by the Board from time to time. All donors are to be so informed. Given that artifacts donated to the O'Keefe Historic Ranch were donated in good faith, the staff is ethically bound to advise

individual donors if there is any intention to de-accession their donation and the reason.

5.3 All material under consideration for de-accessioning should:

5.3.1 document the reasons and purpose for de-accessioning for future reference;

5.3.2 take all steps necessary to seek the consent of the donor;

5.3.3 advise other bona fide museums or groups of interest of the availability of the item.

5.4 Should the Curatorial Committee recommend the disposal of any items in such a way to effectively destroy it due to its lack of value, intrinsic, historic, exhibition or otherwise the Committee shall be bound by subsection 5.3.

5.5 Artifact transfer may be carried out with other bona fide institutions on the basis of gift. Artifacts may be considered for sale only with Board approval and the proceeds may be used for direct care of or purchase of additions to existing collection. For example, if the Ranch has five whatnots, two may be sold with the proceeds used to restore the remaining three.

## 6. ARCHIVES

6.1 The O'Keefe Ranch Archives shall serve as a repository of information. Its objectives and purposes shall be:

6.1.1 to collect and preserve material of historical significance to the O'Keefe Ranch and the rural development of the North Okanagan;

6.1.2 to classify, index, catalogue and preserve material deposited within it;

6.1.3 to make the material accessible to the public for reference and research.

6.2 The O'Keefe Ranch Archives shall collect material that relates to O'Keefe Ranch, the rural history of the North Okanagan and interior BC ranching heritage. The material shall include:

6.2.1 Private Papers – either original or copies of original records of individuals, groups, business or others, for example: personal letters, diaries, memoirs, documents, memoranda, and correspondence.

6.2.2 Visual Records – for example: photographs, negatives, drawings, prints, maps and architectural blueprints.

6.2.3 Oral Records – memoirs of individuals primarily produced on tape and mass-produced recordings such as gramophone cylinders, records, piano rolls and tapes.

6.2.4 Published Matter – mass-produced printer matter, for example: books (fiction and non-fiction), pamphlets and brochures.

6.3 Some material, although of historical interest, will not be accepted. This may include archival material deemed unsuitable for reasons of size, condition, relevancy, duplication, unreasonable access restrictions, incompleteness of data or ambiguity of provenance.

6.4 Acceptance of archival material shall be subject to the following:

6.4.1 the decision to accept archival material shall be made initially by the Curator and approved by Management

6.4.2 Archival material not directly related to the O'Keefe Ranch and its mandate is subject to recommendation by the Curatorial Committee and approval by the Board.

6.5 The O'Keefe Ranch archives will accept archival material primarily as gifts and bequests. Loans of archival material will not be accepted unless for short term for the purpose of copying or display.

6.6 All archival material shall become the property of the O'Keefe Ranch & Interior Heritage Society with the exception of short term loans. This involves a full legal transfer. It will be the responsibility of Management and their designate to:

6.6.1 ensure that the donor fully understands that the transfer is permanent;

6.6.2 ensure that by all reasonable means that the donor has legal title to the archival material in question;

6.6.3 provide the necessary forms for legal transfer and keep them on record.

6.7 All archival material shall be made accessible to the public except for:

6.7.1 private papers with restrictions imposed by the donor;

6.7.2 any material restricted for other reasons (such as fragility) by Management or their designate. Archival material shall be available for use only on the premises.

6.8 Copying archival material will be limited by any restrictions for such imposed by the donor or copyright. Photocopying or photographic scanning of archival material will be supplied by request, at a reasonable rate.

6.9 All the foregoing policies and procedures shall be reviewed regularly by the Curatorial Committee and are subject to change by the Board.