

## Preliminary Program

Program can change without notice.

Updated: March 3, 2022

### Day 1: March 7, 2022

10:00 am – 11:00 am

#### Opening Plenary

##### **PLN1 Dollars for Digital: Evaluating Strategies for the Monetary Appraisal of Digital Content in Archival Donations**

The Co-Chairs of the Ad Hoc Committee on Monetary Appraisal of Electronic Records (MAER) will present the findings and recommendations of MAER's recent report.

**Welcome: Karen Teeple** | Chair, National Archival Appraisal Board

**Opening Remarks: Leslie Weir** | Librarian and Archivist of Canada, Library and Archives Canada (LAC)

**Moderator: Christina Nichols** | Executive Director, Canadian Council of Archives

**Speakers: Richard Dancy** | Systems and University Records Archivist, Simon Fraser University Archives; Co-Chair, MAER Committee

**Jeremy Heil** | Digital and Private Records Archivist, Queen's University Archives; Co-Chair MAER Committee

11:00 am – 11:10 am

#### **Health Break** ☕

11:10 am – 12:30

##### **PLN2 Approaches for Appraising Electronic Records**

This session is a learning workshop, intended to introduce possible approaches for appraising electronic records and spark conversation amongst participants in smaller groups and one person in each group will be invited to report back to the larger group.

**Moderator/Speaker: Curtis Sassur** | Archival & Special Collections, University of Guelph, MAER Committee Member

**Discussion Groups Facilitated by: Richard Dancy** | Systems and University Records Archivist, Simon Fraser University Archives; Co-Chair, MAER Committee

**Jeremy Heil** | Digital and Private Records Archivist, Queen's University Archives; Co-Chair MAER Committee

**Jessica Whyte** | Digital Assets, Librarian, University of Toronto Libraries, MAER Committee Member

12:30 pm – 13:30 pm

Lunch Break 

13:30 pm – 15:10 pm

### **PLN3 Looking Forward: Future Work on Electronic Records**

A facilitated feedback and brainstorming session, intended to generate and prioritize recommendations for future work by NAAB and appraisers on electronic records. Participants will be divided in small discussion groups and one person in each group will be invited to report back to the larger group.

**Moderator/Speaker: Jessica Whyte** | Digital Assets, Librarian, University of Toronto Libraries, MAER Committee Member

**Facilitated by: Richard Dancy** | Systems and University Records Archivist, Simon Fraser University Archives; Co-Chair, MAER Committee

**Jeremy Heil** | Digital and Private Records Archivist, Queen's University Archives; Co-Chair MAER Committee

**Curtis Sassur** | Archival & Special Collections, University of Guelph, MAER Committee Member

15:10pm - 15:30pm

**Day 1 - Closing Remarks: Karen Teeple** | Chair, National Archival Appraisal Board

## **Day 2: March 8, 2022**

10:00 am – 10:55 am

### **Plenary**

#### **PLN4 Plenary: Perspectives for Monetary Appraisal**

The monetary appraisal of donations of significant documentary heritage in electronic formats is closely related to continuing discussions amongst archival institutions, NAAB and CPERB regarding the monetary appraisal of archival fonds. Ian Wilson will discuss the nature of the specialized marketplace for archival fonds and outline ideas on how the cost of ownership might provide the key to determining the fair market value of fonds in any medium.

Before the 1970's, UK archives were largely considered the financial responsibility of their owners and custodians. Since then, archival collections have benefitted from a range of government tax incentives, grant funding sources and protection from export through mechanisms often originally devised to secure, acquire, catalogue and conserve works of art and museum objects. James Travers outlines these measures and the challenge to them posed by the digital shift.

**Opening Remarks: Joanna Aiton Kerr** | Chair, Canadian Council of Archives

**Speakers: James Travers** | Cultural Property Manager, The National Archives (UK)

**Ian Wilson** | Retired, Former Librarian and Archivist of Canada, Library and Archives Canada (LAC)

10:55 am – 11:10 am

**Health Break** 

11:10 am – 11:55 am

**Concurrent Sessions**

**S1 Archives - Preparing an Internal Monetary Appraisal for CRA Receipts**

Decades ago, it rarely occurred to a donor of archival materials to ask for an income tax receipt from their local archives for the value of a donation. Now, in-house monetary appraisals by archivists, for modest values, are becoming more commonplace and even expected. As an archivist, how do you begin this process, what documentation is required, how do you justify your valuation and how do you protect your institution from the risks associated with charitable receipting?

**Moderator: Dominique Foisy-Geoffroy** | A/Manager, Governance, Military and Political, Archives Branch, Library and Archives Canada/Government of Canada

**Speakers: Mireille Lebeau** | Archivist, Bibliothèque et Archives nationales du Québec

**Maureen Nevins** | Acting Manager, Literature, Music, Performing Arts Private Archives, Library and Archives Canada

**S2 Monetary Appraisal Report Writing – For NAAB Panels (case studies and databases included)**

The uniformity and quality of NAAB appraisal reports is integral to the credibility of the practice of monetary appraisal across Canada. NAAB has been working towards standards of professional practice for report writing to address a myriad of challenges and achieve greater consistency in its appraisal report, in both French and English. In this session, through case studies and other examples, we will learn about current challenges and consider the interventions being employed.

**Moderator: Gordon Burr** | Chair, Professional Development Committee, National Archival Appraisal Board

**Speakers: Marcel Caya** | Vice Chair, National Archival Appraisal Board

**Lara Wilson** | Director of Special Collections and University Archivist, University of Victoria Archives

11:55 am – 13:00 pm

**Lunch Break** 

13:00 pm – 13:45 pm

**Concurrent Sessions**

### **S3 Evaluation Strategies for Archival Records (Part 1 of 2)**

This session is the first of a two-part session series (sessions 3 & 5) which will focus on specific case studies with a view to understanding the appraisers' approach to monetary appraisal for various types of records. How is the fair market value determined? What are the criteria? What is the significance of "Reasoned Justification" in establishing the value of records? Where are the sales precedents and how are they applied? Come learn from the experiences of seasoned appraisers!

Elwood H. Jones' presentation will focus on the monetary appraisal of a remarkable collection of annual diaries kept by a farmer in Otonabee township near Peterborough. The farmer had strong connections with other farmers in the area and with a variety of businesspeople in Ashburnham and Peterborough. The collection contains 45 volumes of diaries manufactured by Brown Brothers, Toronto, records information about the day-to-day activities of the farmer, and a financial record of his routine spending.

Richard Lohead's presentation will provide an overview of criteria used in determining fair market value of audio-visual records and then provide an example of the evaluation of the oral interviews of a prominent labour activist.

**Moderator: Karen Teeple** | Chair, National Archival Appraisal Board  
**Speakers: Elwood Jones** | National Archival Appraisal Board Appraiser, Archivist, Trent Valley Archives

**Richard Lohead** | National Archival Appraisal Board Appraiser, Former Manager, Moving & Sound Image, Library and Archives Canada

### **S4 CRA - Donations In-Kind and Archival Records**

The Canadian government has promoted donations in-kind of cultural property since the late 1960's and from the outset archival materials were included. The CRA and its predecessors wanted a system that met certain litmus tests. Archival institutions have greatly valued donations-in-kind as a welcome alternative to limited, and often non-existent acquisition budgets, thereby encouraging people to donate archival materials to institutions for the benefit of all Canadians. In this session, we will explore the CRA rules for donations of in-kind property and discuss some of the tips and traps for archives.

**Moderator: Mario Robert** | President, Historical Society of Montreal

**Speaker: Renee Gray** | Senior Policy Advisor, Policy, Planning and Legislation Division, Charities Directorate, Canada Revenue Agency

13:45 pm – 14:00 pm

**Health Break** 

Coffee with the Secretariat (Optional)

Are you interested in the Database of Archives' Values (DAV)? Grab your coffee and join the Secretariat staff for a few minutes to talk about it)

**Christina Nichols** | Executive Director, Canadian Council of Archives

**Isabelle Alain** | Project Manager, Information Technology & Special Projects, Canadian Council of Archives

**Charlotte Forbes** | NAAB Coordinator (Intern)

14:00pm – 14:45 pm

### Concurrent Sessions

#### **S5 Evaluation Strategies for Archival Records (Part 2 of 2 Sessions) (w/case studies)**

This session is the second part of the two-part session series (sessions 3 & 5) which will focus on specific case studies with a view to understanding the appraisers' approach to monetary appraisal for various types of records. How is the fair market value determined? What are the criteria? What is the significance of "Reasoned Justification" in establishing the value of records? Where are the sales precedents and how are they applied? Come learn from the experiences of seasoned appraisers!

Brock Silversides' presentation will look at the monetary value of photographic negatives and their significance. Brock will also demonstrate the documented markets and potential ways of comparing various categories of negatives.

Stephen Lunsford's presentation will focus on an analysis of an appraisal of an archive of printed and manuscript documents where no direct sales precedents are known. The resulting analysis is the basis for a "reasoned justification" of the appraiser's opinion of fair market value for an archive related to the Chinese in British Columbia.

**Moderator: Karen Teeple** | Chair, National Archival Appraisal Board

**Speakers: Stephen Lunsford** | National Archival Appraisal Board Appraiser, Rare Book Dealer

**Brock Silversides** | National Archival Appraisal Board Appraiser, Former Director of Media Commons, University of Toronto Libraries

#### **S6 Archival Institutions - Donor Relations and Canadian Cultural Property Export Review Board (CCPERB) Applications**

CCPERB's revised *Guide for Monetary Appraisals* has imposed significant changes to the methodology used to justify the appraised fair market value of archival fonds and in most cases influential Canadians no longer have the same incentive to donate their records to a designated Canadian institution. In this discussion, panelists will discuss how these changes are affecting the donor relation strategies at their institutions.

**Moderator: Melanie Hardbatt** | Acquisitions and Outreach Archivist, Simon Fraser University Archives and Records Management Department

**Panelists: Krisztina Laszlo** | Archivist, Rare Books & Special Collections, UBC Library

**Loryl MacDonald** | Associate Chief Librarian for Special Collections & Director of the Thomas Fisher Rare Book Library, University of Toronto

14:45 pm – 15:00 pm

**Health Break** 

15:00pm – 15:45 pm

### Concurrent Sessions

#### **S7 Evaluation Strategies for Digital Records, including Graphic, Cartographic and Architectural Materials, and for Audio-Visual records.**

The three presenters will discuss both archival appraisal and monetary valuations, drawing on their experience as both archivists and evaluators, and in particular with their work with archival records that have been previously acquired by LAC. Included will be PowerPoint presentations and online resources for use in evaluation strategies.

**Moderator/Speaker: Jim Burant** | Director, Ontario Region, National Archival Appraisal Board

**Speakers: David Brown** | Manager, Library and Archives Canada

**Ken Larose** | President, Metaphrase Inc.

#### **S8 Strategies for the Monetary Appraisal of Archival Cultural Property**

Stakeholders in the archival community have indicated additional support would be welcome in order to understand how best to locate sources of market data, to extrapolate fair market value based on that data, and to formulate a reasoned justification in support of the proposed fair market value. CCPERB is developing information resources in order to offer some strategies on these fronts.

**Moderator: Marcel Caya** | Vice Chair, National Archival Appraisal Board

**Speakers: Kelly Juhasz** | Principal, Fine Art Appraisal and Services

**Mijin Kim** | Executive Director, CCPERB, Administrative Tribunals Support Services of Canada

15:45 pm – 16:00 pm

**Health Break** 

16:00pm – 17:05 pm

### Closing Plenary

#### **PLN5 Cultural Diversity and Monetary Appraisal in Canada**

In the Closing Plenary of the Forum, Ry Moran will draw from his extensive first-hand experience at both the Truth and Reconciliation

Commission and the National Centre for Truth and Reconciliation to consider multiple pasts, presents, and futures enmeshed in the work of truth and reconciliation and will explore how human rights-based frameworks provide a path forward.

**Opening/Closing Remarks: Joanna Aiton Kerr** | Chair, Canadian Council of Archives

**Speaker: Ry Moran** | Associate University Librarian – Reconciliation University of Victoria