

Évaluation

NEWSLETTER OF THE NATIONAL ARCHIVAL APPRAISAL BOARD
BULLETIN DU CONSEIL NATIONAL D'ÉVALUATION DES ARCHIVES

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Table of contents

Board and Committee News

- [Message from the Chair](#)
- [New Chair of the Newsletter Committee](#)
- [Report of the Research Committee](#)
- [Lists of NAAB Board & Committees Members](#)

Announcements

- [Launch of the Database of Archives' Values \(DAV\)](#)

Columns & Articles

- [Dr. Hübner's Hammer Prices](#)
- [The Monetary Value of Negatives](#)

AGM 2022 Reports

- [Board of Directors](#)
- [Ad Hoc Committee on the Monetary Appraisal of Electronic Records](#)
- [Monetary Appraisal Review Committee](#)
- [Newsletter Committee](#)
- [Nomination Committee](#)
- [Professional Development Committee](#)
- [Research Committee](#)

News on Members

- [Obituary – John Moldenhauer](#)
- [Retirement – David Russell](#)

MESSAGE FROM THE CHAIR

Joanna Aiton Kerr, PNA
Chair, NAAB Board of Directors

Greetings fellow appraisers! It is with pleasure that I write my first newsletter submission as the Chair of NAAB. I am looking forward to getting to know NAAB members, learning from your experience and expertise, and working with you as we continue to build upon the work of the Future of NAAB Working Group -- forging a path for NAAB during this tricky era for monetary appraisal in Canada.

By way of introduction, I live in Fredericton NB with my husband, 2 nearly-grown daughters, 2 dogs and 1 very feisty cat. I earned my MAS from UBC and have 22 years of experience working in religious, university, and government archives under my belt, with a little bit of privacy and right to information background thrown in for good measure. I have been with the Provincial Archives of New Brunswick for 11 years in several different roles, Chair of CCA for 4 (term ending November 2022), and involved with provincial councils since 2000. As a graduate of the first NAAB Masterclass, I have been a PNA for just a few short years and only recently participated on my first Panel. My introduction to monetary appraisal, however, goes back nearly 10 years thanks to Burt Glendenning who would, when conducting appraisals for PANB, walk in to my office, hold up some papers or a ledger without providing me with any context and demand "what would you pay me for this?" and then refuse to leave until I provided some sort of answer. What a way to learn! My wild guesses as to value were close to his actual appraisals often enough that my interest in learning "how to do it properly" grew. Thank heaven (or should I say Karen and Marcel) for the Masterclass.

In closing, I'd like to recognize Karen for the hard work and dedication she poured in to her years as Chair. Karen, you steered NAAB through a period of significant change and introduced numerous key initiatives – no small accomplishment. Because of you, NAAB is now better positioned to fulfill its role, to the benefit of all Canadians. A sincere thank you from all of NAAB!

NEW CHAIR OF THE NEWSLETTER COMMITTEE

Brian Hubner, PNA
University of Manitoba Archives & Special Collections

I have been fortunate enough to have been asked to take over from Cheryl Avery the chair of the NAAB Newsletter Committee. Excited as I was to be able to have this opportunity to work with the committee to produce *Évaluation*, I had already contributed a series of articles since the start of the newsletter in 2019. The first was a review of prices paid for Canadian archives over a period of almost 10 years reflecting my interest in what sorts of sales attracted enough attention to be reported in mainstream media. The following year, I wrote two articles focused on what is for me some of the most interesting historical documents and photographs which come onto the market or are appraised for donation, namely those related to Louis Riel. Interestingly, as I write I am appraising another fascinating Riel letter written not too long before his execution in 1885. At the end of 2020, I successfully defended (via “Zoom”) my PhD dissertation (University of Amsterdam) on the topic of “The Ghostly Shadow” in the Archives: An Archival Case Study of the Creation and Recreation of the Hamilton Family fonds at

the University of Manitoba Archives & Special Collections.” The T.G. Hamilton Family fonds is composed mainly of records of the family’s paranormal research. It includes many séance photographs which, when they come on the market, often fetch high prices at auction or sale here and in the U.S. I was able to include a section on Hamilton auction sales in my dissertation. After the accomplishment of being awarded a doctorate, I felt bold enough to ask the Newsletter Committee to have my contributions part of a regular column titled: “Dr. Hübner’s Hammer Prices”. Two more columns have followed and the third is part of this issue.

Thanks to the entire committee, and especially Cheryl and Karen Teeple, for their fine work on this first *Évaluation* of the new committee. You will find a lot more here than my column including information concerning NAAB activities and appraisals. I hope you find this issue both enjoyable and informative.

REPORT OF THE NAAB RESEARCH COMMITTEE

Simon Rogers, PNA
University of St. Michael’s College, University of Toronto

The NAAB Research Committee was developed in 2021 by Marcel Caya, in consultation with Richard Dancy and myself, to examine the rationales behind the terminology used in certain aspects of the monetary appraisal process. Following the publication of further guideline amendments from CCPERB, and the publication of the MAER report [Dollars to Digital: Evaluating Strategies for the Monetary Appraisal of Digital Content in Archival Donations](#), it was determined in consultation with the NAAB Board that the Research Committee could be merged with the Ad Hoc Committee On The Monetary Appraisal Of Electronic Records (MAER) to explore the implications of that report in the broader context of assessing the monetary appraisal process for all archival formats. I also agreed to chair the committee in the summer of 2022 to see this new mandate through for a two-year term. Members of the MAER Committee were polled for their interest in joining the new committee and Jeremy Heil, Curtis Sassur and Jess Whyte agreed to extend their service. Richard Dancy and Yves Lapointe have chosen not to renew their membership but should be commended for their invaluable contributions to the foundation of a new era of thinking about the monetary appraisal process and its application to archival property. New members, Melanie Hardbattle and Francesca Holyoke, as of October 2022, have already begun to contribute to the Research Committee in exciting ways, and we anticipate the addition of a representative from LAC in the fall, in a consultative capacity. The newly structured Research Committee will review the practice of monetary appraisal pragmatically. We will examine the recommendations of the MAER report, the archival sales indexing of realized values in a Canadian context, and historical and contemporary perspectives on the monetary appraisal process. The mandate of the committee, as summarized in its terms of reference, is as follows:

“The Research Committee will include members of NAAB who are interested in advancing the knowledge about all aspects of monetary appraisal of archives in all media. On a longer-term basis, and with the view of creating a manual of best practices on monetary appraisal of archives, the committee will work on researching and developing a framework of guidelines and best practices for monetary appraisal of all types of archival records, including electronic records.”

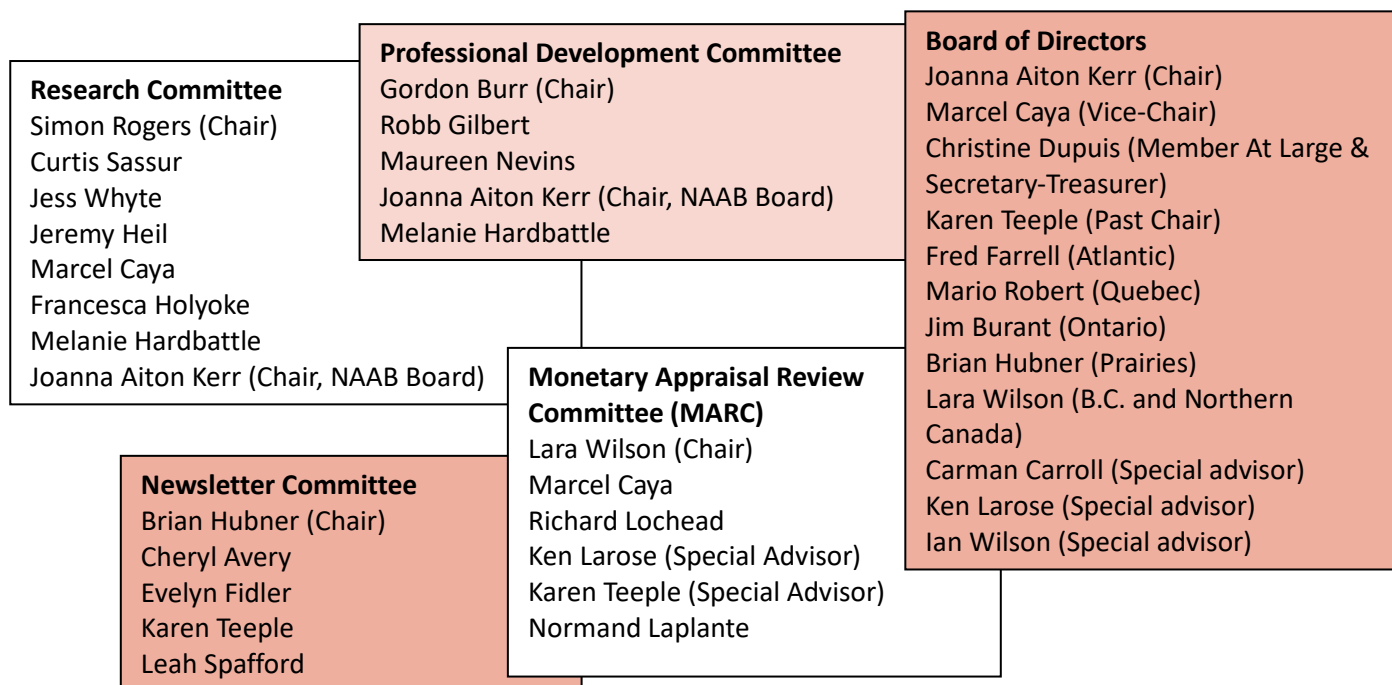
It is my sincere hope as chair of this committee that we will give fair hearing to a broad range of perspectives on the monetary appraisal process in archives and across the cultural landscape. I would like to personally invite members of the archival community to contact me any time regarding any aspect of monetary appraisal, and to help us with their knowledge, experience and insights to make this aspect of archival practice as open, sensible and trustworthy as possible. I am very excited to begin this new project with such a fine group of collaborative and creative thinkers. Any readers are invited to contact the chair at: simon.rogers@utoronto.ca for further information or comments.

LISTS OF NAAB BOARD & COMMITTEES MEMBERS

To all NAAB members:

Please take a few minutes to familiarize yourself with the 2022-23 NAAB board and committees. You will notice in the following list some familiar names and some new names, all of whom will bring fresh ideas and approaches to the work of NAAB. I know we will all work hard in the coming months and years to overcome some of the challenges NAAB is facing and become more resilient and active than ever. As new chair of the Newsletter Committee, I and the other committee members hope to make *Évaluation* increasingly informative and relevant. We are always looking for new members to participate on these committees!

Please note the merger of the MAER Committee with the Research Committee.



LAUNCH OF THE DATABASE OF ARCHIVES' VALUES (DAV)

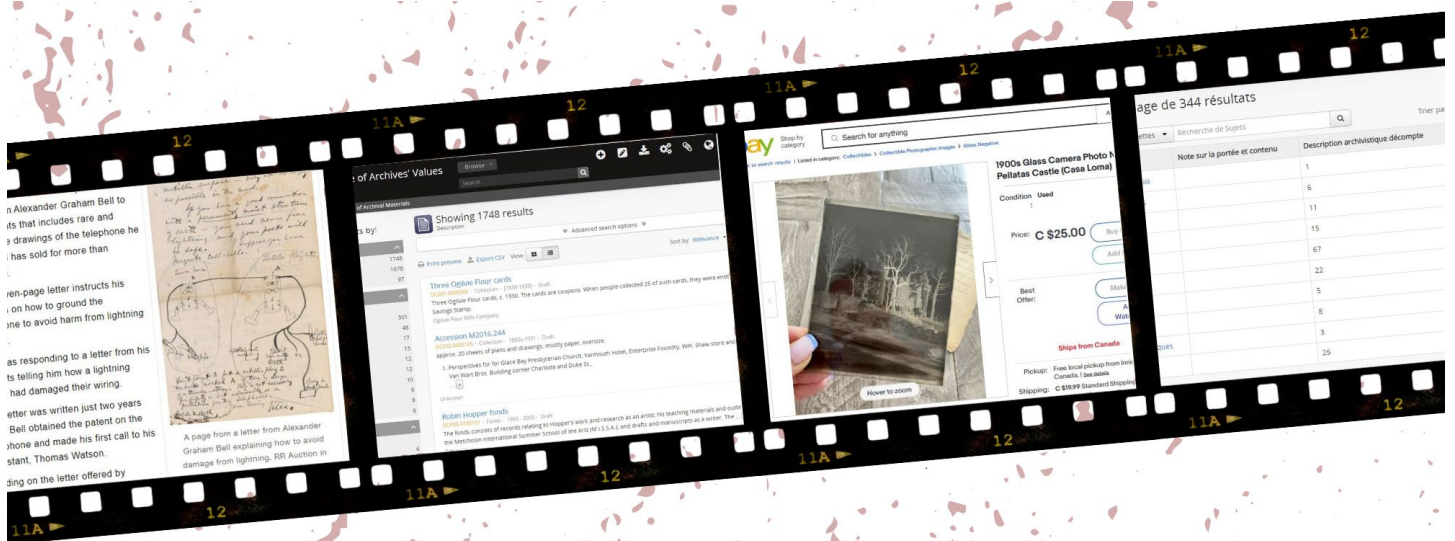
DAV is an online research tool created by the National Archival Appraisal Board (NAAB) in partnership with the Canadian Council of Archives (CCA). Development was funded in part by the Council of Provincial and Territorial Archivists (CPTA). The purpose of DAV is to provide access to sales (market) information and purchases of archival materials by archives across Canada. Reputable dealer listings (values) may also be included, as well as relevant international market information.

While DAV has been accessible to PNAs since early 2022, this summer, NAAB launched the Database of Archives' Values (DAV) by offering access to archival institutions for a yearly subscription fee. DAV currently contains 1750+ entries of archival values, 25% of which were submitted by Canadian archival institutions from their acquisition records. Access to this important database is tightly controlled and each subscriber must be validated by NAAB's secretariat before access is granted.

The launch was announced to the broader archival community on the ARCAN-L listserv and by email outreach to key contacts. Following the launch, the NAAB secretariat planned a series of six (6) demo sessions to introduce interested parties to this new monetary appraisal tool and encourage institutions to subscribe. Demo sessions, held in English and French from July through October, have allowed us to spread the word about the availability of the database and to give community members an in-depth tutorial on how to use it. Over 30 community members attended these sessions.

The purpose of this series of demo sessions is to promote the usefulness of our monetary appraisal tool to institutions and to give them enough information to determine whether their staff would benefit from having access to DAV to carry out their duties. The response to the launch has been quite positive and demo session attendees asked thoughtful questions about the content and functionality of the tool. Their suggestions and feedback will help us improve the usefulness of this important tool.

Are you interested in learning more about DAV? Please contact Charlotte Forbes at naabcoordinator@archivescanada.ca

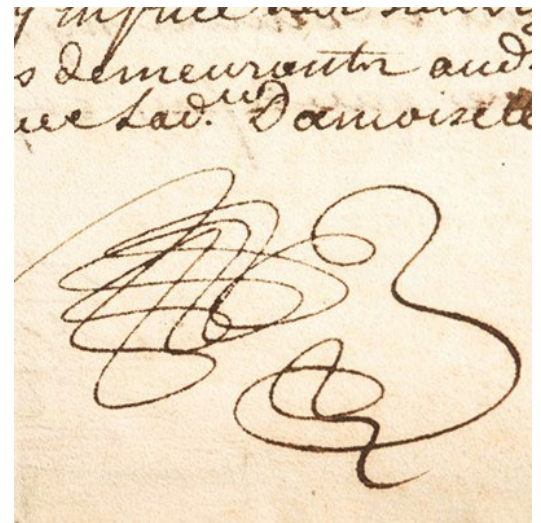


DR. HÜBNER'S HAMMER PRICES

"The Le Moyne de Longueuil Family Auction of 2019"

Dr. Brian Hubner, PNA
University of Manitoba Archives & Special Collections

This edition of "Hammer Prices" looks at the prices paid at an online auction at A.H. Wilkins Auctions and Appraisals (Toronto) on 24 September 2019.¹ The documents in question were passed down in the Le Moyne de Longueuil family from the late 17th to the 19th century. Charles le Moyne came to New France from Normandy to serve as a soldier and administrator and for his efforts was awarded the seigneurie of Longueuil in 1672. His oldest son Charles (II) le Moyne de Longueuil was made Baron de Longueuil by Louis XIV in 1700 following his own successful military career. This was the first title of baron awarded to a native-born French-Canadian in New France, and is still inherited by the Le Moyne family, the only title from the French regime still recognized today in Canada.²



Example of a document from the Le Moyne de Longueuil auction

The family was very prominent, in this period, in the military, government, and judicial affairs of the Royal Province of New France, and then the Provinces of Quebec, and later Lower Canada. The first letter of the collection dates from 1693, and the collections of historical documents span from then to the early 19th century. Of the early documents several are signed by Louis XIV, then Louis XV, succeeding them were the British military governors of Quebec including Guy Carleton and Frederick Haldimand. There are many legal documents related to land ownership, births, marriages, and deaths. For a listing of the lots and the prices paid see the chart below:

Lot; and # of Documents	Dates	Description of Document(s)	Pre-Auction Estimate	Price Realized
1. (1)	1693	Letter signed by Louis Phelypeaux Pontchartrain (with red wax seal)	\$1,000-\$1,500	\$2,640
2. (1)	1692	Letter signed by Louis XIV to the lieut. of the King (on vellum)	\$2,000-\$3,000	\$3,840
3. (1)	1700	Letter signed by Louis XIV awarding the title Baron de Longueuil to Charles Le Moyne	\$2,000-\$3,000	\$9,000
4. (1)	1775	Copy of Letter (1700) of Louis XIV, signed by the clerk of the Archives	\$1,000-\$1,500	\$1,680
5. (1)	1704	Louis XIV signed letter of Command to New France (on vellum)	\$2,000-\$3,000	\$5,520
6. (1)	1704	Letter signed by Louis XIV appointing Lord Macart to the Superior Council (on vellum)	\$2,000-\$3,000	\$4,320

¹ The auction results appear to have been taken down by A. H. Wilkens but a basic description remains: https://www.ahwilkins.com/Auctions/205_Specialty_Documents_Collection_In_Conjunction_With_Fine_and_Decorative_Arts [site accessed 23 August 2022]

² There is also extensive biographic information on the family, for example in the *Dictionary of Canadian Biography*, http://www.biographi.ca/en/bio/le_moyne_de_longueuil_et_de_chateauguay_charles_1E.html [site accessed 23 August 2022]

7. (4)	ca. 1768 – 1796	Letters signed by the governor-generals of Quebec, Frederick Haldimand and Guy Carleton	\$2,000-\$3,000	\$3,120
8. (5)	ca. 18 th century - 1768-1796, one dated 1775	Letters to and from Gov.-Gen. Guy Carleton (on parchment)	\$800-\$1,200	\$3,840
9. (4)	ca. 18 th century – 1768-1796, one dated 1774	Letters signed by Gov.-Gen. Guy Carleton	\$1,000-\$2,000	\$3,600
10. (group of 6 documents)	ca. 1775-1788	Letters signed by Lt.-Gen. Ricard Prescott	\$800-\$1,200	\$2,400
11 a. (group of 6 documents)	ca. 1785-1788	Letters signed by Lt.-Gov. Henry Hope	\$800-\$1,200	\$900
11 b. (1)	1704	Contract of Marriage between Paul Le Moyne de Maricourt and Gabrielle-Françoise Aubert de La Chesnaye [historical note: at the time Gabrielle-Francoise was 17, and Paul died 5 weeks later]	\$300-\$500	\$900
12. (1)	1767	Signed Passport of Baron de Longueuil issued by Louis XV (on parchment)	\$2,000-\$3,000	\$2,640
13. (3)	3 letters dated from the late 1700s to 1801	Letters written to or from royal persons of France and England in the period	\$600-\$800	\$570
14. (4)	2 of the letters are dated 1774, and 2 1776	Letters disputing the title of Baron de Longueuil	\$2,000-\$3,000	\$1,200
15. (5)	18 th century documents (one dated 1723)	Land documents related to Quebec	\$800-\$1,200	\$2,040
16. (1)	1737	Signed letter of Louis XV appointing Paul Bécart de Granville et de Fonville, a Captain	\$2,000-\$3,000	\$2,880
17. (5)	ca. documents from the 1 st half of the 18 th century	Legal documents signed by Jean-Baptiste Adhemar royal notary of Quebec	\$800-\$1,200	\$960
18. (6)	18 th century	Property documents related to the Le Moyne family	\$800-\$1,200	\$780
19. (6)	18 th century, one dated 1753	Financial documents and letters related to the Le Moyne family	\$600-\$800	\$1,800
20. (6)	Late 18 th to early 19 th century, one dated 1839	Parish birth and baptismal documents related to the Le Moyne family (on parchment)	\$300-\$400	\$1,140
21. (4)	19 th century	Four parish death certificates, one a copy, related to the Le Moyne Family (on parchment)	\$300-\$500	\$240
22. (7)	18 th and 19 th century	Parish and legal documents issued to Joseph Le Moyne	\$800-\$1,200	\$840

23. (1)	18 th century	Two-page legal document outlining Le Moyne inheritance	\$300-\$500	\$570
24. (6)	Late 18 th century	Letters written to Joseph Le Moyne by prominent persons	\$300-\$500	\$1,140
25. (6)	1777-1802	Military related letters written to Joseph Le Moyne	\$500-\$700	\$1,800
26. (5)	18 th century	Assorted military documents	\$600-\$800	\$2,400
27. (6)	18 th century, one 1716	Historical and military related documents (some on parchment)	\$500-\$700	\$2,640
28. (3)	ca. Mid-18 th century	Military documents related to Gaspard-Joseph Chaussegros de Léry?	\$1,000-\$1,500	\$1,920
29. (group of newspapers and list of stockholders)	18 th and 19 th centuries (the stockholders list is from the late 19 th century)	Assorted 18 th and 19 th century newspapers from Britain and Canada, includes a list of stockholders	\$400-\$600	\$540
There are approximately 120 documents (the number of newspapers is not given), in 30 lots dating from 1692 to the early 19 th century. A few are dated latter such as some of the parish documents, a stockholder's list, and the newspapers.			Total estimate (averaged): \$38,000	Total realized: \$67,860

As you can see, the total realized by the auction was almost twice that of the estimate. Only four lots were sold below estimate and even those were close and generally these lots contained routine documents not associated with prominent persons. The highest selling lots (single documents) were those signed by the reigning French monarch.

Take care until the “Hammer Comes Down” again.

THE MONETARY VALUE OF NEGATIVES

Brock Silversides
A-V Archivist, Edmonton

For some time now, appraisers have had a difference of opinion as to whether negatives really do have a monetary value, and if – as for many other types of archival records - there really is a marketplace. Negatives have admittedly not been very present in the marketplace, nor been highly sought after in the past - as opposed to the photographic print. Traditionally art galleries and private collectors of photography have made a point of acquiring vintage prints, not negatives. The prints have been considered the finished work of a photographer. He or she has made the choices of paper surface, tinting or toning, dodging or burning or manipulation, and of course selective cropping or framing – all of which is seen as the final manifestation of the photographers’ vision.

At best, the negative was seen as simply the raw material from which the final work was made from. To many people, it has even been seen as superfluous. How many of you know amateur photographers who, once a print or set of prints were made, simply threw out the negatives? As it reflects a complete reversal of tones and colours, it is difficult to “read,” to understand, to fully appreciate, and it is definitely not displayable. The negative does not give obvious visual gratification.

But many arguments can also be put forward for the importance of the negative. They are the first generation of an image, meaning the finest quality iteration. They are less “mediated” and usually offer more visual information than is in the final print. Groups of negatives tend to include outtakes and alternate takes, which in many cases are just as interesting and historically valuable, sometimes more so than the frame selected for printing. And multiple negatives – just like multiple prints – can give greater context to a particular shoot, an assignment, or a photographic project. And a negative has one big advantage: it can be used to make any number of positive prints, and is the best iteration from which to do a digital scan.

Most appraisers instinctively know that negatives have an immense intrinsic value. They also realize that this type of visual document can have tremendous research and historical value, as well as potential exhibition and publication values. And finally, in the digital image-dominated last two decades, negatives have also become desirable legacy artifacts. Many appraisers have tried to translate these nebulous values into some kind of reasoned justification, but it has not been easy to then turn this into a convincing and credible monetary value.

An early approach, and one that I feel still has considerable merit, attempted to incorporate replacement values – i.e. the cost of purchasing negative film, plus the cost of processing to arrive at a per item value. This was not particularly difficult to do – by consulting period manufacturer or retailer catalogues or even advertisements in magazines and newspapers, you could figure this out with some accuracy. Then - with evidence of a reasonably thoughtful selection and weeding process, and an accurate count of the negatives - a base value range was easy to arrive at. This was relatively straightforward until film technology was superseded by digital technology in the decade between 1990 and 2000. Both the materials and the processing became rare and expensive specialty items and specialty services, which skewed the prices and made those values more difficult to support.

Too often though, appraisers and appraisal panels did not look beyond the simple math and take into account the fact that these negatives have visual content, and content should play the major role in determining value. So while replacement cost ensured a minimum value which surely was and still is justifiable, it also resulted in many collections being woefully undervalued. It can still be a useful approach though, especially for very large collections of negatives. But it can also be problematic if replacement value is considered as the sole criteria.

Just as for photographic prints, a market value for negatives can generally be adapted from comparables – meaning the value of similar items being offered and purchased in the marketplace. These sales comparison values can be accessed from a large variety of vendors: from the international auction houses which deal in high-end fine art photography such as Christies, Sothebys, and Phillips, to reputable commercial galleries such as Stephen Bulger in Toronto – who has in the last decade sold negatives to institutions or collectors), to the large number of smaller regional sellers that deal in local and vernacular photographic works.

Negatives first started populating the auction marketplace by accompanying a vintage print (which is a way of guaranteeing the prints authenticity and exclusivity), but shortly after were added on their own merits. They really came into their own within the largest (and ever-growing) free access on-line marketplace – eBay - which deals in every type and level of photographic works. For the past decade most of the movement in this type of collectible has been on eBay. eBay listings may be the most responsive to the collector’s market and, it can be argued, are the most immediate reflection of that market. eBay figures provide an amazingly accurate ballpark – likely the best balance between what a seller wants for their image, and what a buyer is ultimately prepared to pay. And sellers on eBay either take bids or are frequently fine tuning their asking prices by simply re-posting to find the real market.

There are still many doubters about the eBay market – archivists, archival managers, occasionally even the photographers themselves, appraisers, and of course certain government bodies – all of whom are seemingly reluctant to, or just cannot acknowledge that the archival marketplace is a unique animal and is NOT like the fine art marketplace. They insist that ONLY a proven auction sale from a well-known auction house or gallery can reflect a true market value. eBay CAN - but for the most part – does NOT reflect the fine art market. In the same way, the fine art photography market CAN, but most of the time does NOT relate to the material that most archives are acquiring, so to expect fine art values to be the benchmark

for archival photographs misses the point. The two worlds rarely meet, and to force the appraisal of one type of property through the lens of the other is an artificial situation, and does not add to the credibility of the appraised value.

There are a few other key differences between the two markets. Auctions are dated and deadlined events. Auction firms tend to have more informed and selective buyers and sellers, and much better histories and descriptions of the properties. The offerings are more curated, and tend to be centred on artistic works associated with the founders and notable practitioners of photography, and are aimed at connoisseur clients. Their work is professional and admirable, and the prices, accordingly, tend to be higher. And once they are finished one may have to pay a subscription to see the realized prices. A few sites I am currently finding very useful are Swann Auction Galleries, Invaluable, Heritage Auctions, and one that is an umbrella for many auction establishments – Live Auctioneer.

Ebay is definitely not exclusive, and not curated in the traditional sense. On eBay, anybody – whether they know anything about a property or not – can throw anything up – and it will very likely find its market audience and its price. There clearly is no bias against any aspect of photography. eBay asking prices are generally lower, but frequently are more realistic, for both professional and amateur photographic material. With eBay the offerings can be posted for a short time, or even continuously until something sells or the seller gives up. When it comes off the site, the links to the offering will be broken after a few days, so it can be difficult to find out if it was sold and what it sold for, - although it will indicate if it was simply re-posted with a different asking price.

You can ignore eBay, denigrate it or look down on it – but that is not going to stop what has become the majority of the collecting world - from using it. And when you will not acknowledge its presence in the appraisal process, that is a prime example of tunnel vision, and you cannot see the fuller picture.

One other problem from the established auctions - there can be a problem finding specific values. There are rarely pure item values – and by that, I mean they regularly batch negatives with many other related items in a larger lot (for instance contact sheets or exhibition prints, vintage cameras, or textual documents like business papers) so it can be almost impossible to tease out the prices just for the negatives.

These issues aside, I just want to repeat - for many years there has been plenty of evidence of a real and documented market for negatives – both individual images as well as groups of images. This is especially true of current trending subject matters such as First Nations, World War II, railroading, car racing, sports figures and events, and images of media celebrities and popular musicians. Negatives of other more mundane but historically important subject matter (buildings, businesses, farming scenes, industries, advertising and product shots, etc.) are also increasingly entering the marketplace, and there is even now value evidence for those images that previously were considered to have no value whatsoever by appraisers – portraits of ordinary people or even the unidentified portrait. For the most part, ALL of these are much more likely to be found on eBay.

And the values for negatives are slowly, but surely, creeping upwards. There are two reasons for this: first, it is an all-but-obsolete process and very few new ones are being made. When there are finite numbers of any type of creative or historic property, people are going to want to acquire some. Second, anyone can now scan negatives themselves. They no longer have to print them or have them printed commercially, or scanned commercially – all of which used to be deterrents. Many collectors who bought the negatives are now selling multiple digital prints made from those very negatives, so these can also be seen as revenue generators which of course makes them even more desirable. And of course this is what many archival institutions are now doing with their negative collections.

Monetary values vary widely in both marketplaces, and that is based on a number of factors: the size of the negative (and thus the resolution or quality), its age, its physical condition, whether there is fading or colour shifting, the reputation of the photographer, the press agency or studio, and – primarily – by the desirability of its visual content at the time of the sale or purchase. So even definite, documented sales figures are not bulls-eyes – they are still part of a range, and only a starting point for a final appraisal figure.

I have assembled a large number of examples from both the auction market and eBay; these are available on the NAAB website, at: https://naab.ca/resources/Documents/ExamplesAuctionMarketAndEbay_BSilversides.pdf.

Note: some of the value links may be broken or rendered obsolete by the time this article is published, as items sell quickly, get taken off the market, or get re-posted.

Examples are provided by type:

- Paper Negative (Calotype, waxed paper, various non-standard sizes: 1830s-1860s)
- Glass Negatives (wet plate, dry plate, 8x10, 5x7, 4x5, 3x5 etc.; 1860s-1920s)
- Large Format – Film (sheet film, 11x14, 8x10, 5x7, 4x5, etc.; mid-1920s – present)
- Medium Format – Film (1901-present)
- Small format (roll film – usually cut into strips; 1910s-1990s)
- Colour (sheet and roll film, all sizes; 1935-present)

To sum up: there IS without any doubt whatsoever an undeniable market for photographic negatives, and it is growing. There are three approaches to giving value to photographic negatives – cost replacement, and the two different sales comparisons: the eBay market, and the auction market. For very large collections – cost replacement appears to work well and provides a consistency across many and varied collections.

For smaller, more curated lots of negatives, appraisers should give consideration to both sales markets – eBay to provide the all-important ballpark, and then the auctions to provide solid comparable values – IF they can be found, and IF they can be related in a meaningful way to the negatives under your consideration. But sometimes the opposite works better: using the auction values for the ballpark, then eBay to narrow it down to a reasonable figure.

None of the three approaches is entirely satisfactory. I personally feel at this time the eBay market is more likely to be relevant to archival negatives... but until there is a new, wider consensus about the unique nature of the archival marketplace (as opposed to the fine art photographic marketplace) – and of the place of photographic negatives in it – one - or two of them in tandem - will have to do the job.

NAAB AGM 2022

The Annual General Meeting for NAAB was held on Wednesday, March 30, 2022 from 12:00 p.m. to 1:30 p.m. ET via Zoom. The following reports from the Board and Committees were completed, translated and made available at the time of the AGM. Since then some of the committee chairs have changed hands and the names of the new chairs are reflected on the list of 2022-23 Board and Committees on p. 3.

NAAB AGM 2022 REPORT FROM THE BOARD OF DIRECTORS

Karen Teeple, Chair

This Annual General meeting marks a major milestone in NAAB's forty plus years of existence and provides an opportunity to highlight some of our accomplishments and insights to the year ahead.

To begin, NAAB's "renewal" goes back to March 2016 when the *Future of NAAB Working Group* was established to develop a framework to guide NAAB towards the implementation of a new business model that would enable it to better meet its objectives in the future. The committee oversaw the amendments to the bylaws to comply with the new federal law requirements for not-for-profit organizations and developed a new mission statement as follows: *To foster public trust and build capacity for expert monetary appraisal services to Canadian institutions holding archival records*. This preparatory work by the committee was the impetus for the change in the governance model. I'd like to acknowledge and thank the committee members for the role they played in getting NAAB to where it is today. These members were: Dominique Foisy-Geoffroy, Sophie Morel, Richard Lothead, Jim Burant, Gabrielle Prefontaine, Christina Nichols (CCA) and myself as Chair. Also, a special thanks to Marcel Caya and Ken Larose who were always generous with their time in providing advice, guidance and encouragement throughout this transition period.

On July 25, 2018 a Transitional Board of Directors was appointed and with that came the responsibility of establishing a voting system for the next election period. And here we are – with an expanded membership and a new slate of directors.

With few exceptions, NAAB has met monthly since 2018. During these past four years we have weathered several changes and experienced many achievements, all of which are critical components for a growing organization. We have developed a new organizational structure and tapped into a pool of talent with our increased membership. Our achievements are significant and reflect a more robust organization in terms of governance, membership, policies and procedures, programming and services.

New bylaws were approved at the July 2018 meeting and these bylaws created a new governance model to establish a clear organizational structure to facilitate more transparency in practice and process; and to improve the responsiveness and relationships between NAAB and its client institutions. This restructuring involved the establishment of five regions, each represented by a Director from that region. One of the more significant changes in this organizational structure was the creation of a new line of responsibility, that of the regional coordinators whose role it is to manage the NAAB panels in their respective regions and be the first point of contact for institutions requesting appraisals. This change is intended to free up the Directors to focus on governance issues and develop the requisite policies and procedures. There is still work to be done in implementing this model and improving upon the information and communication network.

Another of NAAB's milestones was the launch of the Masterclass, an initiative to implement a credentialing process to encourage archivists to become a Practising NAAB Appraiser (PNA). The first four masterclasses were offered in Fredericton, Edmonton, Ottawa and Toronto in February and March 2019. The last one was held in February 2020, just prior to the outbreak of Covid-19. Organizing these masterclass sessions required intensive work, but the end product was worth the effort, with the emergence of over forty new PNAs from all regions of the country. This increase in the number of monetary appraisers has not only served to broaden the knowledge base of appraisal practices, but has increased the awareness of NAAB's efforts to strengthen its position as a centre of excellence in the realm of monetary appraisal of archives. It is NAAB's intentions that appraisers will use these new skillsets in their respective institutions for internal appraisals, and that they will be competent to do independent appraisals as well as NAAB appraisals.

The increase in membership has also facilitated the creation of several committees that have enabled work to be shared on important issues that further advance the viability and effectiveness of the organization. New PNAs involvement in various committees has allowed them to engage more fully in the operations of NAAB. These committees include the Newsletter committee, the Professional Development committee, the adhoc committee on the Monetary Appraisal of Electronic Records, the Research Committee, the recently created Monetary Appraisal Review Committee (MARC) as well as the Nominating committee, (responsible for the current slate of new Directors). Of course, with the new Board of Directors soon in place, we are always looking for new members to volunteer on committees.

The activities of NAAB have also been significantly enhanced by the development of two databases in the past several years, both of which adapted the AtoM software for its functionality. The first of these is the NAAB database of past appraisals which includes those appraisals dating back to 2014. This database has been instrumental in allowing appraisers

to browse or search its contents to assist them in finding comparable appraisals for similar records they are preparing to evaluate. It has also been an extremely useful source for educational purposes in the NAAB Masterclasses. The other Database of Archives' Values (DAV) has been designed to provide access to sales (market) information and purchases of archival materials by archives across Canada. Both these databases are valuable resources that not only build our capacity for content but also provide more effective tools for appraisers to carry out their work.

However, NAAB has not been without its setbacks. Covid-19 pretty much paralyzed appraisal activity for 2020 and 2021 as institutions closed down and staff were required to work from home. Limited processing of records meant limited, if any, monetary appraisals. Now that institutions are starting to reopen, requests for appraisals are being received though we have yet to see what the "new" workplace looks like and how that will impact on appraisal activity.

In mid to late 2020, the Canadian Cultural Property Export Review Board (CCPERB) revised its Guide for Monetary Appraisals which imposed several changes to the methodology used to determine the fair market value of certified donations. NAAB, along with the Canadian Council of Archives (CCA) and other major stakeholders, took objection to these unwarranted changes. We sent submissions to CCPERB indicating our major concerns about its narrow interpretation of fair market value as well as their focus on providing recent sales comparables as the sole methodology for the monetary assessment of archival property. Despite the number of thoughtful submissions made by the archival community to CCPERB with appropriate recommendations, CCPERB failed to incorporate any of them and continue to confuse "fair market value" with "market prices". This current impasse with CCPERB remains an ongoing challenge for NAAB and further action needs to be explored.

To counter much of the appraisal inactivity during Covid, NAAB decided to launch a series of six knowledge sharing sessions in July and August 2021. This was established to bring everyone together to reconnect on a more informal basis to listen to the stories, experiences and insights of our NAAB pioneers. Despite the fact that it was held over the summer months, these sessions were well attended by approximately 30% of the PNAs and allowed for much discussion and interaction amongst appraisers both young and older.

Looking ahead

As NAAB regains its momentum after the hiatus imposed by Covid, there are some obvious priorities that remain on our radar. One of the key purposes of the virtual Monetary Appraisal Forum of March 7-8, 2022 was to highlight and discuss the report, researched and written by the Adhoc Committee on the Monetary Appraisal of Electronic Records, entitled, *Dollars for Digital: Evaluating Strategies for the Monetary Appraisal of Digital Content in Archival Donations*. It will be the responsibility of the new Board of Directors to assess the recommendations for implementation and to determine the next steps to further build on the recommendations of the committee's report.

Equally important is the work currently being undertaken by the newly established Monetary Appraisal Review committee (MARC). It has long been a major goal of NAAB to standardize the report template to ensure the necessary consistency in form, content and analysis in all regions of the country. Although the committee is still in the early stages of its work, the review of the template and development of accompanying guidelines will be essential to facilitating solid and credible reports.

Further initiatives need to be developed to provide ongoing professional development opportunities to serve archival and heritage institutions. We are hoping to deliver more Masterclasses to other regions of Canada over the next few years pending available resources. To date much of these Masterclasses have been carried out by willing volunteers but suffice it to say much more could be done with additional resources. Other suggestions for training workshops, lecture series and webinars, possibly covering specific media, are waiting to be developed to build on our existing skills and knowledge and we look to our membership to come forward with proposals.

On a final note, on the behalf of NAAB's Board of Directors, I would like to express our appreciation to the Chairs and members of each of the committees for their active participation and interest in helping to make NAAB a more vital and effective organization. On a personal note, I am very grateful to all the Directors on the Board who have provided me with

support and guidance throughout. It has been a pleasure to work with you. And last but not least our deepest gratitude to the NAAB Secretariat for their unrelenting support and commitment to NAAB's continued operations. We're extremely lucky to have such a dedicated team, all of whom make the extra effort to ensure that our operational needs are met while keeping us on track at all times.

NAAB AGM 2022 AD HOC COMMITTEE ON THE MONETARY APPRAISAL OF ELECTRONIC RECORDS (MAER) COMMITTEE REPORT

Richard Dancy and Jeremy Heil, Co-Chairs

The focus of the MAER Committee's work in the past year was on the completion of our final report, *Dollars for Digital: Evaluating Strategies for the Monetary Appraisal of Digital Content in Archival Donations*. A first draft was submitted to the NAAB Board on November 28, 2021; we then incorporated feedback, made revisions, and submitted the finalized report on January 13, 2022.

MAER members also joined with NAAB's Professional Development Committee to help plan the online NAAB *Dollars and Sense* Conference that took place in March 2022. Day One of the Conference was mainly taken up with MAER-related content. Committee co-chairs Richard Dancy and Jeremy Heil gave an overview of the report's findings and recommendations in the opening plenary. Two subsequent workshop sessions made up the

remainder of Day One and were led by committee members Curtis Sassur and Jess Whyte respectively, dealing with themes relating to the report. Committee members Yves Lapointe, Simon Rogers, and Jeremy Heil will also present on MAER's work at the upcoming in-person conference of the Association des archivistes du Québec (May 25-27, 2022).

With this, MAER's terms of reference come to end, and our mandate expires on March 31, 2022. We've had three years to work together to explore issues relating to monetary appraisal of digital archives. It's been enjoyable, and we thank the Board for that opportunity and the CCA Secretariat for all their logistical and administrative support.

NAAB AGM 2022 MONETARY APPRAISAL REVIEW COMMITTEE (MARC) REPORT

Lara Wilson, Chair

The Monetary Appraisal Review Committee (MARC) was formed in the fall of 2021, as a standing committee of the NAAB Board of Directors; and NAAB Chair Karen Teeple distributed a message to appraisers and client institutions, informing them of the new structure and process.

MARC undertakes review of reports written by NAAB panels in order to provide recommendations to enhance the nature and content of appraisal reports. Currently MARC's main activity is the review of reports to be submitted for CPERB cultural property certification application. Any fundamental issues that may compromise the integrity of the monetary appraisal services to Canadian archival institutions are identified. During its work, MARC members review, discuss and consider whether current archival monetary appraisal reports conform to best practices and standards.

MARC membership:
Lara Wilson, Committee Chair
Marcel Caya
Normand Laplante
Karen Teeple

Ken Larose, Special Advisor
Richard Lohead
Curtis Sassur, joined 2022

The first meeting of MARC was held on 14 November 2021 via Zoom. Subsequent meetings were held on 22 December 2021 and 14 March 2022, to review NAAB panel reports submitted by NAAB appraisal panel chairs.

Future work of MARC will include:

- review findings and develop recommendations for the standardization of report writing templates or guidelines
- review of sample non-CCPERB NAAB panel reports for consistency
- consider current practices and evolving landscape, and make recommendations for development or changes to best practices, policies or tools for NAAB panels; and
- make recommendations for the professional development needs for PNAs and others engaged in archival monetary appraisal

NAAB AGM 2022 REPORT OF THE NAAB NEWSLETTER COMMITTEE

Cheryl Avery, Chair

Among the earliest conversations I had with Karen Teeple regarding the work of the transitional NAAB Board was the question of how best to keep PNAs informed about the work of Board and its committees. We also wanted to help ensure the information and expertise so evident at the Masterclasses could be made more widely available, possibly expanded upon, and any questions answered. We hoped to offer additional resources for appraisers, and to keep the community up to date on what had become a challenging relationship with CCPERB.

And so the NAAB newsletter was born.

We have produced five issues of *Évaluation*. The first issue was sent out in November 2019; and the latest, this March. It is published in French and English; normally

issued twice a year (spring and fall); and to date, has been available only to PNAs. We intended it to become publicly available two years after its initial publication date, and toward that end have begun the process of obtaining an ISSN.

From the start, it has been a team effort. Brian Hubner has been a faithful columnist; Sophie Morel and Marcel Caya have reviewed the French versions to ensure appraisal terms survived translation; and we we could not have managed without the many talents of Isabelle Alain. Karen Teeple and all the committee chairs provided regular updates; and the newsletter committee members provided suggestions, proofread, and edited...Simon Rogers came up with our perfectly bilingual name, and Leah Spafford suggested “Dear NAABy.” Evelyn Fidler provided an expert editorial eye.

Our collective thanks to everyone who took the time to contribute articles.

NAAB AGM 2022 NOMINATION COMMITTEE REPORT

Christine Dupuis, Chair

The nomination committee was created to provide the Board of Directors with recommendations for the membership of the Board of Directors and committees.

The committee is composed of Christine Dupuis, Chair, Karen Teeple and Cheryl Avery, with the administrative support from the secretariat.

The members of the nomination committee met a couple times in the past year to prepare recommendations of candidates for the election of the Board of Directors.

Proposed slate of candidates for 2022 elections

Chair = Joanna Aiton Kerr* (2 years),
Vice-Chair = Marcel Caya (1 year),
Secretary-Treasurer = Christine Dupuis (1 year),
Director for Atlantic = Fred Farrell (2 years),
Director for Québec = Mario Robert (2 years),
Director for Ontario = Jim Burant (1 year),
Director for the Prairies = Brian Hubner (2 years),
Director for BC and the North = Lara Wilson (1 year)

Special Advisors:
- Carman Carroll
- Ken Larose
- Karen Teeple (past Chair)
- Ian Wilson

*Starting later in the fall. Karen Teeple will stay on until the fall.

NAAB AGM 2022 ANNUAL REPORT OF THE NAAB PROFESSIONAL DEVELOPMENT COMMITTEE

Gordon Burr, Chair

The committee was established in 2020 with myself as chair. The other members are Dominique Foisly-Geoffroy, Regina Landwehr, David Sharron (left in 2021) and Melanie Hardbattle. Karen Teeple, Chair of the NAAB Board of Directors is the Board representative on the committee and the administration of the committee is supported by Christina Nichols, CCA Executive Director and Louise Charlebois, CCA Staff (Recorder).

Over the past year we have been meeting monthly to evaluate existing professional development course content from other organizations, developing new webinars, and creating a multi course curriculum framework based on an online course model for new PNA's.

In support of these activities, Christina Nichols and Melanie Hardbattle have designed and distributed a NAAB survey to gather information from both current and prospective PNA's to elicit their input on the future direction of the PD program. The survey was distributed and evinced 112 responses from both current (32%) and prospective (68%) PNA's.

Since May of 2021 we have been working on a NAAB training manual (Book of Knowledge) and are awaiting the results of our application for funding to further this project.

We are also developing educational seminars for current PNA's and presented a very successful 2021 summer series of six events.

The PD Committee also served as the Program committee for the NAAB 2022 March Monetary Appraisal Forum *Dollars and Sense*. We met regularly from October 2021 to February 2022 with the NAAB Ad Hoc Committee on the Monetary Appraisal of Electronic Records (MAER) along with members of the Chelsea Group to create the programming for this event.

NAAB AGM 2022 RESEARCH COMMITTEE REPORT

Marcel Caya, Chair

The idea of creating a research committee emerged mostly from the need to share the research potential of the increasing membership of NAAB, not only with PNAs, but also with member institutions. Its need mainly became apparent during the preparation for the Masterclasses, as I tried to include in my concluding remarks a few paragraphs on the future of the knowledge base that we share as a group. I also had in mind the projected manual that we all want to draft eventually to standardize our practices. Such a project can only be undertaken on the basis of solid research on the peculiar nature of appraisal for archival records. The deciding factor mostly came during the drafting of the response to the CCPERB's communication document which negated the particular nature of the appraisal of archival fonds and imposed a guide that totally ignores the possibility to attribute a dollar value to donations of archival fonds rarely found in collectors' usual marketplaces.

The challenge of CCPERB's *Guide*, which confuses "fair market value" with "market value", made it more urgent to create an initial research committee to see how such a body could work within the NAAB structure. Using the example of the Committee on Monetary Appraisal of Electronic Records, the idea was launched and discussed at the January 2021 Board of Directors meeting. With the agreement of the Board members, Karen Teeple and Marcel Caya drafted the terms of reference for the May 2021 meeting. So far Simon Rogers and Richard Dancy have agreed to serve on the committee; we hope that a few more members can join us.

The main activity of the committee this year was to provide input and revise the response to the *Communication to Archival Stakeholders of CCPERB* entitled "Challenging CCPERB".

A draft work plan is circulated at the moment and will be discussed at our first meeting.

OBITUARY – JOHN MOLDENHAUER (1943-2022)

Elwood H. Jones, Ph.D.
Archivist, Trent Valley Archives
Archival appraiser since 1970

John Moldenhauer, a close friend since 1984, passed away in Cuba on Groundhog Day. In some ways it was a fitting end, but I miss him. The archival community has lost a major supporter and advocate; he may be irreplaceable.

As a librarian at the University of Guelph, one of John's proudest moments was the acquisition of the Lucy Maud Montgomery archives. That position also provided opportunities to give lectures at the Association of Canadian Studies, which in turn helped him build bridges to book publishers and dealers in Britain, and to fish in some of its storied streams.

John Moldenhauer was very knowledgeable on all aspects of the archival appraisal world. A collector since his teenage years, John was then mainly interested in guns and the field sports. He was an avid fisherman who had great skill from his many fishing adventures, but he was also well-read in all aspects of the literature. That knowledge led to his founding of *Rising Trout Sporting Books*, a business which he ran from his home, first in Elmira and later, near Hanover. I visited, and was impressed with his creative use of space for his books. I purchased an 1840s book that caught my fancy for its neat binding workmanship, but the book itself was an encyclopedia of field sports in Britain that I have often consulted. I have a framed lithograph print by my bed that I told John he would love as it was an 1825 shooting contest with clay pigeons. He said they were probably real pigeons, and that is true.

More recently I acquired an eighteenth-century print of a horse that belonged to a prominent British politician, and we quickly established that I had a bargain purchase.

When Trent Valley Archives received an inquiry about an African-Canadian³ gun maker who lived in Peterborough, and married a girl from an area farm, I sought help from John. His helpful response was that our researcher 'will look for a long time for a Canadian-made flintlock sporting rifle. I have been collecting Canadian rifles for over 60 years and have never seen or even heard of an example.' The subject of the query turned out to be only the second black gun maker noted in the sources, and I wrote the amazing story about John Cosley in the Heritage Gazette of the Trent Valley. Cosley was a whitesmith⁴ and barber but did not make rifles.

That inquiry had a more fascinating outcome for me. One of those he consulted about Cosley happened to have a trove of documents related to Peterborough. John asked if I were interested and within hours I drove to John's home, saw the documents and purchased them. The cubic foot of records related to the Mechanics Institute in Peterborough, which was the forerunner of the Public Library. This was a very valuable find. John died a few months later and I am forever grateful about all aspects of that trip.

I interviewed John to be a NAAB appraiser in 1984. He flew from Waterloo to Peterborough and I met him at the airport, had the interview and he became a most valuable archival and books appraiser. We had many adventures in archival appraising, including participating in what may have been the first NAAB carpooling. Many will remember John as a presenter at the NAAB conference in 2007 in which he and David Russell spoke about how to appraise architectural collections.

My confidence in John was probably best demonstrated when NAAB received a request to appraise digital archives related to public opinion polls. I also called on Terry Cook, who was appraising such records at the Library and Archives Canada, and who later wrote about our experiences in a valuable article for *Archivaria*. The third member of the team was a Globe and Mail columnist who was familiar with the business of using such polls. There were many complexities to consider and I was never prouder of the signature NAAB principles that I have described as a process of triangulation.

John gave advice on curious aspects of archival documents that I encountered in Peterborough. One collection had a file of "flies," which seemed like an error but was actually a story that the author intended for a book on *Favorite Flies in Vermont*. John sent me a copy of the book. Peterborough was often a place of comings and goings, and a wide knowledge of history is an asset.

³ John Crosley was identified as an African on the 1871 census.

⁴ A "whitesmith" is a person who makes articles out of metal, normally "light" metal such as tin.

John also was on appraisal teams at Trent Valley Archives, and I recently consulted his observations on the diaries of John Graham Weir which I used as a NAAB case study on how to appraise diaries in the contemporary world. I was impressed with his astuteness and insights.

John was a roving spirit and his annual travels to Cuba and less frequent trips to the museums of Europe were stories that also animated me. He will be missed both as a great friend and a pillar of archival appraisal work.

RETIREMENT – DAVID RUSSELL

Jim Burant, PNA

David Russell has announced his retirement as a Practising NAAB Appraiser after having been a member of the National Archival Appraisal Board for over forty-five years. Born and raised in Montreal, David attended Bishop's University for his undergraduate degree before obtaining an M.A. in Canadian history at Queen's University in 1970, with his MA thesis focusing on The Ontario Press and the Pacific scandal of 1873. He joined the staff of the Archives of Ontario as an archivist in 1969, later becoming the Supervisor of the Private Manuscripts Section, before leaving AO in the mid-1980s.

David became a member of NAAB in 1977, and participated in numerous appraisal sessions for major institutions across Ontario annually. He acted as the Regional Director of NAAB for the National Capital Region from 1984 to 2014, which entailed the organization of appraisal committees when requests for appraisals were made, as well as being part of the Board of Directors for NAAB at a national level. In his career as a NAAB appraiser, he has carried out hundreds of appraisals at LAC and other institutions in his capacity as the chair of numerous NAAB Appraisal Panels, as well as serving on other appraisal committees at various archives in Ontario and Quebec. In addition to his work with NAAB, Mr. Russell has also carried out numerous independent appraisals. David's appraisal reports were models for their incisiveness and elegance of language.

In addition to his work for NAAB, David has been active in the heritage community in his adopted hometown of Delta, Ontario, where he moved after the passing of his father in 1999. In 2013, he established the David Russell Fund for the Department of History at Queen's University which generates income to be used at the discretion of the Head of the Department of History in support of areas of greatest need, including but not limited to chairs, professorships, fellowships, scholarships, bursaries or awards, research, infrastructure or equipment. Russell created this fund both to thank Queen's for the training that allowed him to pursue his career as an archivist in Canadian History, and in remembrance of his late father, Gilbert H.S. Russell.

David is also a great music lover, with a deep interest in Wagner, especially the Ring Cycle, but all opera and indeed classical music of all kinds have always been part of his life. He also has an unparalleled knowledge of Ontario architecture and architects, and a wide interest in many other subjects. David's discursions about music, history, his lived experiences and so much more are filled with insight, humour and charm – many of us who have worked with him over the years will miss those conversations, carried out over a lunch or dinner table or in various boardrooms and offices for so many years.

David will no doubt continue to be active in pursuing his love of music and history. In the meantime, NAAB would like to thank him for all that he has done for NAAB, and for our country's heritage.

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