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1. GENERAL STATEMENT

Collections Development and Management are integral parts of the operation of the Whitchurch-Stouffville Museum (Museum). It is an ongoing activity that enables the Whitchurch-Stouffville Museum & Community Centre (WSM&CC) to fulfil its Vision, Values, and Mission Statement (2012) and the collection serves as the core around which the Museum's education, interpretation, exhibition, collection development and community service activities can be developed.

The term "collection" is used in this policy to mean those historically-significant artifacts that are acquired to contribute to an understanding of past human behaviour, customs, activities, special events, institutions and personalities that make up the rich and diverse heritage of our community.

The Museum applies each year for a Community Museum Operating Grant through the Ontario Ministry of Tourism, Culture and Sport. This policy complies with the policy and operational guidelines of the grant program.

2. LEGAL AUTHORITY

The Museum is the repository for a collection that is representative of the history of the communities of Whitchurch and Stouffville, under the trusteeship of the W-S Museum Advisory Committee (Committee) which is appointed by the Town of Whitchurch-Stouffville Council. The collection is held and managed in the public trust.

3. COMMITMENT

The Museum is committed to managing its collections to ensure the highest level of informational value of the collection as well as the best possible balance of care for and use of the collection. The Museum is committed to both caring for and documenting as completely as possible, the objects in its collection. The Museum is equally responsible for making its artifacts and the information pertaining to them accessible for the education and enjoyment of the public.

3.1 Responsibility of Staff and Volunteers

The Museum supports the collection management duties conducted by staff and volunteers, in order to fulfill the Museum's Vision, Mission and Values Statement and its role as public steward of the collection.

To this end:

- The Curator will ensure that policies, guidelines, and procedures are developed and implemented. The Curator is responsible for ensuring that anyone who works with the collection is aware of these policies and

procedures. Staff and volunteers will follow these procedures and policies in a consistent manner.

- Staff and volunteers will strive to maintain objects in the collection and collections records in an environment conducive to preservation. The Curator will ensure that the collection is inspected regularly for evidence of damage or deterioration. (Any staff member or volunteer who discovers a preservation problem or damage to the collection must report it immediately to the Curator.)
- All staff is responsible for maintaining the security of the collection.
- The Curator will ensure that artifacts having the potential to be hazardous to the public, staff, volunteers, the environment, or the collection will be properly handled, stored, and/or de-accessioned, as required. All safety regulations (WHMIS) will be followed.
- The Curator will ensure that staff and volunteers who have physical access to the collection are trained in and use appropriate care and handling procedures.

3.2 Ethics

The Museum acquires artifacts and/or collections only if it has adequate resources (human, financial, temporal, spatial) to document, preserve, store, research, exhibit, and interpret the artifact/collection being considered.

The Museum does not acquire material:

- That has questionable, undetermined, or unethical history of ownership
- That has been collected, sold or otherwise transferred in contravention of any municipal, provincial or federal legislation
- That may constitute a conflict of interest related to the issue of personal collection.

4. DEVELOPMENT OF THE COLLECTION

The development of the Museum's collection follows the focus established in the Vision, Values, and Mission Statement (2012).

Development of the collection will meet both the immediate and long-term objectives of the Museum.

Development will build on strengths and address weaknesses in the collection – as determined by curatorial staff – and will take into account current and future projects and needs.

It is recognized that priorities may change over time and according to storage

capabilities, future exhibitions, and deficiencies in the collection. The purchase and/or conservation of objects is supported as resources allow.

The responsibility for the development of the Permanent Collection resides with the Curator who will assume an active role in maintaining community connections, including contact with potential donors. In instances where the acceptance of an artifact will significantly impact operating activities and/or incur costs not currently anticipated by the Museum's five year capital forecast, the Committee will be consulted prior to any formal offer of acceptance is issued. The Curator shall reserve the right to decline any object offered to the Museum if the item does not comply with the Museum's stated purpose of direction according to this policy.

The responsibility for the development of the Hands-On collection resides with the Curator, with input from the Program Coordinator.

There are four categories in the Museum's collection, including:

4.1 Permanent Collection

These are authentic, historical objects in complete or nearly complete condition that are not to be used other than for display and research. The majority of objects being acquired for the Museum's collection will belong within this category.

4.2 Hands-On Collection

These objects may be duplicates of items in the Permanent Collection or modern reproduction that may be used as interpretive tools for education, exhibition, and special event purposes.

4.3 Props Collection

These are objects for which no donor information, no collection records nor an accession number could be located. Duplicates, samples or models of objects that may be useful for exhibit and education programming but have no significant historical value in and of themselves, will also be considered props.

4.4 Restoration Collection

Items that are to be used in the restoration of an artifact in the Permanent Collection, or as replacement parts for artifacts in the Permanent and Hands-On Collections.

5.0 ACQUISITION

The acceptance and retention of any item in the Museum's collections will be

based on the importance and relevance of that item to the stated Vision, Values, and Mission Statement (2012), as well as on the resources available to the Museum to care for the item. The Museum cannot guarantee that items accepted into the collection will be exhibited.

The Museum collects objects, photographs, and printed and audio-visual material pertaining to the history of its local communities.

Each year, the Museum will allocate a portion of its resources including personnel, space, equipment, materials and budget for the purpose of caring for and managing the collection.

5.1 Criteria for Acquisition

Priority will be given to the following:

- 5.1.1 Those items, documents and artifacts that have been made, sold or used in the Whitchurch-Stouffville area that best serve to illustrate the natural history, human settlement and historical development of Whitchurch and Stouffville. The parameters for collection will be to collect items created 45 years prior to the present date or earlier.
- 5.1.2 Secondary to this are artifacts that are typical of Whitchurch and Stouffville as a community in Ontario and Canada.
- 5.1.3 Objects and articles that, although outside the scope of the foregoing paragraphs, are considered to be useful in future developments of the Museum, its exhibits and interpretive programmes. Consideration must also be given to the possibility of obtaining a particular object at a later date when it does fall into the accepted time frame parameters.
- 5.1.4 No acquisition will be made where conditions are set that restrict the use or disposition of an artifact in fulfilling the purpose and aims of the Museum.

The Museum will strive to acquire artifacts that are generally complete and in good condition and for which provenance is well documented. The decision to acquire an artifact will be based on the following considerations. The item should:

- Constitute an exemplary sample of an aspect of Whitchurch or Stouffville history currently not represented in the collection. (Provenance and other documentation must be taken into account when evaluating duplicate status.)

- Be in good to excellent condition (Some exceptions may apply in the case of a unique item in poor condition.)
- Be well documented
- Be directly relevant to current research, exhibit or interpretation programs
- Not pose a threat to users, including staff, volunteers, and guests, or other artifacts in the collection

5.2 Approval Process for Acquisition

Acquisitions are the responsibility of the Curator, in consultation with the Program Coordinator and/or the Manager of Leisure & Community Services (Manager), where appropriate.

The prospective donor or vendor must be issued a *Temporary Acceptance Receipt* (TAR) at the time artifacts are received by the Museum. If the artifact is rejected, the owner will be notified and given thirty days to retrieve the object. As noted on the TAR, if the owner does not retrieve the object within thirty days it will be disposed of in accordance with the Museum's guidelines and procedures.

A Gift Form must be signed to prove the transfer of ownership if the artifact is accepted.

5.3 Methods of Acquisition

5.3.1 Gift or Bequest

A gift or bequest may be accepted from any source, including a staff member.

For gifts that require the issuance of a tax receipt, please see Appendix 1.

5.3.2 Purchase

Artifacts may be purchased by the Curator. Purchases over \$500 must be approved by the Manager.

5.3.3 Exchange

The exchange of artifacts between institutions is an established and useful means of developing and improving a collection. Exchanges may be arranged by the Curator with approval of the Manager.

Exchanges may be made provided that:

- Both parties are in full agreement with the terms and conditions.
- Both the acquisition and the disposal of artifacts are documented for the permanent records.

- The removal will be approved through the deaccessioning process.

5.3.4 Transfer

The Museum may acquire artifacts from other institutions. The transfer must be supported with documentation.

5.3.5 Found in the Collection

Un-accessioned objects that have been treated as artifacts over time but for which acquisition documentation cannot be found are designated “found in the collection.” These objects will be accessioned and are represented by a “0” in the donor section of the accession number (i.e. 2016.0.1).

6. DOCUMENTATION

The Museum must accurately and thoroughly document the collection to realize its value and significance. Documentation is essential for collection development, research, preservation and interpretation. Documentation is the responsibility of the Curator and other staff or volunteers, as appropriate.

Documentation will include information in written, electronic, audio visual or graphic form pertaining to the identity, locality, provenance and transfer of legal title of artifacts in the collection and other related information regarding significance, function, description and condition.

When being integrated into the collection, each artifact must be described in sufficient detail to enable the detection of any deterioration. Any change in condition or treatment to an artifact will also be documented.

The Museum will use consistent, professional standards, methods and procedures to document the collection. Documentation must be maintained as a permanent record. Temporary or permanent change in the status of an artifact such as an outgoing loan, on exhibit or deaccessioned must be thoroughly documented.

Normally documentation itself is not considered part of the collection. Legal documents dealing with acquisitions must be kept in hard-copy form with duplicate copies being stored in two separate buildings. An electronic copy will also be stored on the Museum’s server. Copies of electronic records must be maintained and stored off-site. Documentation should be maintained in a secure and stable environment.

7. PERMANENT COLLECTION CARE

The Museum has a responsibility to preserve its collection in perpetuity, with the exception of objects designated as the Hands-On Collection. This includes artifacts in storage, on exhibit, used for research, on loan and in transit. All staff and volunteers will be trained in proper and current methods of care and handling of the collection, as it pertains to their area of work. In all of these activities, staff will comply with WSM&CC Conservation Policy.

The preservation of the collection is the direct responsibility of the Curator and other staff as appropriate. All staff, volunteers, and Committee members share the responsibility.

A complete inventory of all artifacts in each storage and exhibit location will be conducted on a rotating basis at a maximum interval of seven years.

8. USE OF AND ACCESS TO THE COLLECTON

The Whitchurch-Stouffville Museum is committed to long-term preservation of artifacts. A balance must be struck, however, between the preservation of the collection and its use for research, exhibition, and educational, promotional and commercial purpose.

Access to the collection is provided through exhibitions, programs, events, collection records, research files, visual resources and consultation with curatorial staff. The Freedom of Information pursuant to the Municipal Act and Protection of Privacy and Copyright legislation restricts access to some information. The collection must be organized and managed in such a way that it is readily accessible for all purposes consistent with the annual and long range work plans of the Museum.

The Museum acknowledges that access to and use of the collection by staff and public increases the risk to artifacts and requires appropriate controls; therefore, access to the collection will be governed by the Museum's Conservation, Exhibition and Research Policies, as well as The Occupational Health and Safety Act and other relevant municipal, provincial, and federal legislation.

8.1 Staff/ Volunteer Access

The level of staff access to the collection is determined by the Curator. Staff and volunteers who handle artifacts must be appropriately trained and supervised.

8.2 Public Access

Other than research requests, all other requests for access will be considered individually and at the discretion of the Curator.

As noted in the Research Policy, the W-S Museum must be credited for any use of its collection.

8.3 Hands-On/ Props/ Restoration Collection

The decision to designate an artifact to any of these collections will be made by the Curator or Program Coordinator. The items should be in good to excellent condition, be either original or reproduction, reflect the programming needs of the Museum, be safe to use, and not contravene any legislation.

Since these items are collected with the intention of enhancing experiential learning during programming, they may be handled by staff, volunteers, and the public. That being said, materials in these collections are managed according to the Museum's collection management procedures and to professional standards – with the exception that the item's description and condition reporting may not be as detailed as that done for the Permanent Collection.

These items are collected and managed separately to maintain the integrity of the Permanent Collection.

The Museum may transfer artifacts that are deaccessioned from the Permanent Collection into either of these collections at the recommendation of the Curator and approval of the Advisory Committee. The reason for this change of status must be documented.

Tax receipts are *not* issued for artifacts donated to these collections. When an item from either of these collections is no longer needed, useful or in poor condition, it may be disposed of as deemed necessary by museum staff. It does not undergo a formal deaccession process, but the status change must be documented.

9. ELECTRONIC RECORDS RETENTION

The Museum's electronic collections management records will be backed up daily through the Town of Whitchurch-Stouffville's remote servers.

10. LOANS

The Museum borrows artifacts from other institutions or individuals for exhibition or other purposes consistent with the Vision, Values, and Mission Statement. The Museum may also loan items to other institutions. In both cases, loan agreements will be signed and a finite loan period will be determined. No long term loans will be considered. It is the responsibility of the Curator to maintain records of all loan agreements.

Determining the suitability of objects considered for loan, either incoming or outgoing, is the responsibility of the Curator who will consider the following:

- the suitability of the borrower;
- the period of time for which the loan is requested;
- the conditions to which the artifact(s) will be exposed;
- the security that can be provided by the requesting institution;
- the transportation of the artifact(s);
- the public educational benefit and/or good will that will be created through the loan of the artifact(s); and
- the agreement of the borrower that the artifacts will be utilized in a static display only unless the Museum has given written authorization that the artifact can be used for demonstration or another purpose.

The Museum will provide the same standard of care and security for the objects on loan as it does for those in its collection. Conservation treatment will not be undertaken on borrowed objects.

11. INSURANCE

Through the Corporation of the Town of Whitchurch-Stouffville, the Museum provides insurance for its collection and for loans to and from the Museum.

12. DE-ACCESSIONING

De-accessioning refers to the permanent removal of one or more artifacts from the permanent collection. In order to maintain a high quality and relevant collection in accordance with the Museum's Vision, Values, and Mission Statement and current professional standards, occasionally it is necessary to deaccession an artifact. Deaccessioning must be undertaken in accordance with the highest professional standards and ethics. Reasons must be ethical, defensible and objective. Approval is required from the Museum's Advisory Committee.

No member of the Museum Advisory Committee, staff or volunteers or their family members may acquire through any means any artifact deaccessioned by the Museum.

12.1 Criteria for Deaccessioning

As annual collection inventories are conducted, items may be identified for potential deaccession.

Items may be considered for deaccession when it is determined that the item is:

- No longer within the scope or mission or collections mandate
- Beyond the capability of the museum to maintain and preserve
- Not useful for research or exhibition programs
- A duplicate item (Provenance and other documentation must be taken into account when evaluating duplicate status)
- A poor, incomplete, unauthentic, or less important example
- Damaged or deteriorated to the point where it does not serve a useful purpose
- Found to contain hazardous materials that could be dangerous to staff, volunteers, or public or poses a preservation threat to other elements of the collection
- Originally acquired illegally or unethically
- Found to be a forgery, fake or copy with no definable purpose;
- Subject to a request for repatriation
- More appropriate to the collection of another museum

The Museum is free to dispose of items in the Hands-On, Restoration and Props Collections in a manner that the Curator deems appropriate.

12.2 Conditions for Deaccessioning

When an artifact is being considered for deaccessioning, the Museum must ensure that:

- It has clear title to the object or - in the case of poorly or undocumented material - be able to demonstrate that it has made a serious, diligent and documented investigation to determine ownership;
- There are no legal restrictions that prohibit deaccessioning the artifact;
- The reasons for removal of the object from the collection are thoroughly documented in accordance to professional standards and documentation;

12.3 Process of Deaccessioning

A proposal for de-accessioning will be prepared by the Curator and will include confirmation of the Museum's clear title to the object(s); an overview of conditions, if any, as to the use or disposition of the object agreed to upon the Museum's acquisition of the item(s); and whether a tax receipt was issued for the donation. It will also include recommendations for the disposition of the proposed artifacts for consideration by the Committee.

12.4 Methods of Disposition

An effort must be made to keep a deaccessioned artifact in the public domain and in Canada by offering it to other museums or public institutions as a gift or for exchange.

The manner of disposition shall be in the best interest of the Town, the citizens of the Town of Whitchurch-Stouffville, and the maintenance of the Museum's public trust.

Upon approval for de-accessioning by the Board and with the preferred goal of keeping the object(s) in the public domain, disposal of such artifacts will be accomplished in one of the following manners as listed in order of priority.

12.4.1. Internal transfer to the Hands-On, Props, or Restoration Collections

12.4.2 Exchange with another museum or public institution

12.4.3 Gift to another museum or public institution. Institutions located within York Region will be provided with the first right of refusal. Where more than one institution expresses an interest in an item, the Curator and Committee will choose an institution based on how well the item matches the institution's mandate and the ability of the institution to preserve and exhibit/interpret the item to the public in perpetuity.

12.4.4 Sale through a publicly advertised auction sale or by reputable and established dealers. Advertising shall not make reference to the Museum in the case of public sale except if in the judgment of the Curator and Committee such advertisement is of benefit to the Museum.

All funds realized from the sale of de-accessioned items will be deposited into the Museum's Artifact Reserve Fund to be used

for future purchases of artifacts for the Museum's collections.

Under no circumstances will de-accessioned items be sold on the Museum property.

12.4.5 The artifact approved for de-accession will be intentionally destroyed if:

- The object is hazardous and poses a danger to staff, public or the collection
- The object has deteriorated or is damaged to the point where it does not serve a definable purpose
- All reasonable efforts have been made to dispose of the object through other methods

Two witnesses must be present to observe the destruction.

Museum staff will maintain thorough documentation of the disposal process that may include written, electronic, and graphic forms.

Accession numbers and any other museum-related markings will be removed from all de-accessioned objects prior to disposal.

13. REPATRIATION

The Museum will de-accession items of cultural significance for the purpose of repatriation when it can be shown that other communities or governments have a right to this material and in accordance with the principles and guidelines stated in the Canadian Museums Association Ethics Guidelines. Requests for repatriation will be approached with respect and sensitivity and will be resolved on a case by case bases.

14. COOPERATION WITH INSTITUTIONS

The Museum cooperates with other museums, galleries, cultural, and educational institutions, organizations and agencies, in order to avoid duplication and achieve an integrated plan for preservation, interpretation, and documentation of artifacts and local history.

15. POLICY REVIEW

The Committee will review this policy at least every three (3) years, or as required.

**COLLECTION DEVELOPMENT/
MANAGEMENT POLICY
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The Curator will conduct the review, in conjunction with the Policy Review subcommittee and other professional staff, as appropriate. The reviewed version will be submitted to the Museum Advisory Committee for approval and then forwarded to Whitchurch-Stouffville Council for adoption.

Board Approval: May 4, 2016
July 6, 2011
September 6, 2006

Council Adoption: ??, 2016
September 20, 2011
October 3, 2006

Next Scheduled Review: 2019

APPENDIX 1

WHITCHURCH-STOUFFVILLE MUSEUM
PROVISION OF TAX RECEIPTS FOR DONATIONS OF ARTIFACTS

It is important to the Museum that donations of artifacts are received in order to enlarge and improve the Museum's collection. The Government of Canada encourages gifts in kind to museums by offering tax advantages to donors.

The Town of Whitchurch-Stouffville encourages the Community to donate gifts for the purposes of enhancing the services and collection at the Whitchurch-Stouffville Museum by issuing tax receipts in accordance with Revenue Canada regulations. Tax receipts will be issued by the Town's Finance Department, based on the object's *fair market value* and only after the Museum has received the appropriate documentation demonstrating the transfer of ownership to the Museum.

The artifact's *fair market value* will be determined through appraisal by an independent and qualified appraiser which may include a Museum staff member where appropriate.

For donations valued under \$1,000, one appraisal will be sufficient.

For donation valued over \$1,000, two appraisals will be required and the average of the two appraisals will establish the fair market value. Donors will be encouraged to provide one appraisal for items valued over \$1,000 while the Museum will secure the second appraisal. If the difference between the two appraisals is more than 50% of the lowest appraisal, then a third appraisal will be required and arranged for by the Museum. The cost of this appraisal will in most cases be borne by the Museum, as financial resources permit.

If the artifact was purchased within the last 12 months of being donated to the Museum, the original receipt or invoice will be accepted as one appraisal.

Documentation on the appraisal of donation and copies of the Tax Donation receipts will be held on file by the Finance Department and the Museum.