



Waunakee Area Historical Society, Inc. Collections Management Policy

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Waunakee Area Historical Society, Inc.

Collections Management Policy

I. Introduction and Mission

The Waunakee Area Historical Society Collections Management Policy establishes policies and guidelines for the acquisition, deaccession, loan care, arrangement and use of the Waunakee Area Historical Society collections. The Waunakee Area Historical Society, Inc. (WAHS) is a 501(c)3 non-profit organization.

The mission of the organization shall be to collect and preserve materials and information relating to the history of the Waunakee, Wisconsin area, in order to connect generations—past, present, and future. Located in Waunakee, Wisconsin, the Society was founded in 2026 and organized by a group of volunteers who were interested in preserving the past. The Board of Directors is responsible for the overall administration and curatorial management of the museum.

The Collections Management Policy of the Waunakee Area Historical Society defines how the Society's mission is pursued through collections activity. The policy guides the Board and volunteers in carrying out their responsibilities for collections development, care and access. This policy should be reviewed regularly and includes ethical obligations that transcend legal requirements.

Standard of Conduct and Ethics: All museum personnel and volunteers must adhere to the Code of Ethics established by the American Alliance of Museums (AAM) and the Statement of Professional Standard and Ethics adopted by the American Association of State and Local History (AASLH).

II. Purpose

- a. To locate and collect any material that may help establish or illustrate the history of the Waunakee, Wisconsin area. These materials shall be collected, preserved, and exhibited in accordance with all laws and regulations that may apply to the collection, possession, and exhibition of such materials. Provenance information, including names and dates of an item, is vital to the acceptance of an object for acquisition.
- b. To disseminate historical information to any interested persons, groups, and institutions and to arouse interest in the Waunakee, Wisconsin area by any of the following means: publishing historical materials either in print or electronically; holding meetings featuring workshops, lectures, or informative programs; conducting historic tours; marking or restoring historic buildings and sites; operating a museum or historic site; and/or any other related activity the organization may so choose to undertake.
- c. To make this material available for the appreciation, enjoyment, study, and research of individuals, scholars, and the general public at large.

- d. To accomplish these goals through the establishment of clearly defined and generally accepted collection, conservation, and interpretation policies and procedures.
- e. To ensure that all programs, functions, and events of the organization, including membership, shall be made available to anyone regardless of race, color, age, national origin, marital status, disability, religious or political affiliation, sex, or sexual preference.
- f. To the extent practicable, make its facilities accessible to the public.
- g. That this organization shall have the power to own property, apply for and receive grants, accept bequests, and establish and maintain an endowment fund for carrying out the above-stated purposes.

III. Scope of Collections

The Waunakee Area Historical Society collects items that relate to local history. This includes items that were created in Waunakee, that reflect the history of Waunakee's diverse residents over time, or that have a direct and important connection to an event in local history or to a prominent Waunakee resident.

WAHS curates two types of collections for which collections standards and procedures vary: permanent and education.

The Permanent Collection holds artifacts with the highest interpretive and historical value that WAHS plans to preserve indefinitely and for which the highest standards of care and processing are implemented. Permanent Collection items are subject to formal accessioning and deaccessioning procedures as defined in this policy.

The Permanent Collection includes four broad categories that differentiate items based primarily on their physical characteristics.

1. ARTIFACT COLLECTION

The artifact collection includes three-dimensional objects, including but not limited to furniture, tools, ceramics and glass, textiles and costumes, paintings and other works of art.

2. PHOTOGRAPH COLLECTION

The photograph and media collections include photographic prints and negatives, as well as sound and film recordings.

3. MANUSCRIPT AND ARCHIVES COLLECTION

The manuscript and archive collections include unpublished materials created by individuals, organizations and government entities. Items include personal papers, correspondence, diaries and scrapbooks as well as business and organizational records.

4. LIBRARY COLLECTION

The library collection includes published books, newspapers, and other printed materials. Items include published histories of Waunakee and surrounding areas, materials about local organizations or residents, and books authored by Waunakee residents. The collection also includes locally produced publications like phone books, yearbooks and local newspapers. Additional resources include atlases, plat books, and individual unbound

maps of Waunakee. As with all Permanent Collection items, library items are non-circulating.

The Education Collection includes objects created or acquired for hands-on educational access, exhibits and programming, and research reference. Such items may duplicate items in the permanent collection, be of lesser quality or historical significance, or be intended for short-term use. Education Collection items are not accessioned, are provided lower standards of care, and are not subject to formal accessioning and deaccessioning procedures. These items are minimally inventoried to ensure they are not mistaken for Permanent Collection items. The Education Collection includes three broad categories:

1. HANDS-ON MATERIALS

Hands-on materials are items designated for frequent hands-on use by the public. Such items will eventually be consumed through this use and may be disposed of when no longer suitable for this purpose.

2. EXHIBIT AND PROGRAM MATERIALS

Exhibit and program materials, sometimes referred to as props, are pieces disposed of when no longer suitable for this purpose, used in exhibitions or events for interpretive purposes. Such items may be disposed of when no longer suitable for this purpose.

3. REFERENCE MATERIALS

Reference materials include research papers, articles, notes, and other resources derived from the Museum's collections and/or compiled and shared by Museum staff, volunteers, or members of the public. Such items offer context to the Museum's collections and are used by staff and volunteers to conduct research at the request of members of the public.

IV. Acquisitions and Accessioning

The WAHS Board of Directors (BOD) manages the acquisition of collections for the WAHS which includes gifts, bequests, exchanges, transfers or other means according to the following guidelines:

1. The BOD will collect items related to the history of Waunakee and the surrounding area. All items must be approved and accepted by the BOD. No items will be accepted with restrictions on them.
2. Objects must possess interpretive value to local or country history.
3. Materials should be useful for exhibition, research or scholarship.
4. Items that do not meet the guidelines indicated in 1-3 of this section, but are supplies/materials that are useful for displays, etc. and are not artifacts, are not covered by these guidelines.
5. Only those objects that can be properly stored, preserved and cared for will be accepted. The BOD may choose not to accept items which are not relevant with the mission of the WAHS, items that are in poor condition, items that duplicate similar items in the collection, or items that cannot be properly stored or cared for.
6. It is intended that accessioned objects shall be acquired to be a permanent part of the

collection as long as they retain the physical integrity, their identity and their authenticity and as long as they remain useful for the mission and purposes of the WAHS.

7. The BOD accepts objects under the following conditions: No guarantees shall be made that the artifacts be retained by the WAHS in perpetuity, that the object will be exhibited by the WAHS, or that it will be used by the WAHS in any specific manner. The BOD reserves the right to make exceptions to this policy in the best interest of the WAHS, only for extraordinary circumstances which greatly benefit the WAHS at the discretion of the BOD after a recommendation for the exception from the Collections Management Committee (CMC), and only after a written request for such an exception which shall include an explanation of the circumstances and basis for the exception.

8. No BOD member shall appraise any artifact; however, staff may render impartial assistance to donors seeking independent qualified appraisers.

9. A Deed of Gift (legal document of conveyance) signed by the President of the WAHS BOD with an adequate description of the object and the conditions of transfer will be made for all acquisitions.

10. The CMC will ensure, through research, that each object is thoroughly researched and certified as authentic and that it serves the mission statement of the WAHS before the object is accepted into the collection.

11. No BOD or committee member shall accept any object for collection. The BOD approves and accepts all items for collection and records the approval in their official minutes. Once an object is accepted into the collection, the BOD or an CMC representative will provide the donor with a Deed of Gift.

12. The BOD may accept items from outside of the Waunakee area, at their discretion, as long as the items represent the historical objectives of the collection.

13. Abandoned property is any object for which a formal loan request, or any paperwork, does not exist. In such cases, the BOD shall be guided by the state's abandon property laws. Generally, such objects become the property of the WAHS if a good faith effort has been made to determine ownership of the item(s) and none can be determined, or notification is made to the last known owners at their last known address, and no reply is received from the query (Wisconsin State Statute, Chapter I71.30-I71.33 for unclaimed property.)

14. Appendix A to this policy is the Artifact Field Receipt Form and Artifact Acceptance Checklist which shall be reviewed and approved by the Artifact Committee.

15. An Artifact Field Receipt Form shall be completed at the time of donation for an artifact or group of artifacts offered by a donor to WAHS and provided to the Chair of the Collections Management Committee (CMC)

16. The Chair of the CMC shall complete the Artifact Acceptance Checklist and provide it, and the completed Artifact Field Receipt to the WAHS BOD to decide to accept or reject all or part of the artifacts offered by the donor.

Accessioning Checklist

Accessioning is the act of making an item part of the permanent collection. Items offered to the Museum must meet the following criteria before accessioning can take place:

1. Does the item document the history of the village or its residents?

Items must contribute to the understanding and interpretation of Waunakee area history and be consistent with the purposes of the Museum as stated in the Mission.

2. Can the museum properly care for the item?

The Museum must be able to adequately provide for exhibit or storage to ensure the item is protected, preserved according to professional standards, and available for Museum purposes.

3. Do we have full background information on the item?

The origin, ownership, and chain of custody of the item is documented to prove provenance and relevance to Waunakee area history.

4. Will we have full ownership of the item?

The item must be an unrestricted gift with proper documentation, to be used at the discretion of the Museum.

5. Is the item in good condition?

The item must be in good to excellent physical condition. Exceptions will be made only for items of significant historical value.

6. Does the item duplicate or complement existing holdings?

Duplicate items are typically not accepted. Exceptions may apply to replace a lower quality item or for use in the Education Collection. Items that complement or fill gaps in existing collections are typically suitable for accessioning unless the above criteria are not met.

Museum staff may decline to acquire offered items if those items do not meet the above criteria. Museum staff may also accept items for uses other than addition to the permanent collection or education collection.

V. Deaccessioning & Disposal/Use of proceeds from sale

As stated in the Deed of Gift, the WAHS may use its discretion to dispose of materials no longer considered appropriate for its collections, unless instructions to return unwanted materials to the donor are stated in the Deed of Gift. Items in the cataloged collections can be disposed of only by a two-thirds vote of the BOD. Funds from the deaccessioning and disposal of an object should be used solely for the benefit of the museum's collection, that is, acquisitions to and care for the collection. By no means, however, should the funds be used for the cost of regular museum administration or maintenance. Any funds generated must be used to benefit the collections.

A. Criteria for Deaccessioning

1. The object is no longer relevant or useful to the state mission.
2. The object has deteriorated beyond exhibition usefulness.
3. The object duplicates an object of superior provenance and/or physical condition.
4. The object cannot be properly stored, preserved or exhibited.
5. Any recommendation to remove any object from the permanent collection and to be disposed of in the appropriate manner must be approved by the Collections

Management Committee and the BOD and recorded in the official WAHS minutes.

6. The Collections Management Committee will be required to maintain a list of all deaccessioned objects.

B. Manner of Disposition

1. The manner of disposition will be in the best interest of the WAHS, the public and the WAHS membership.

2. The method used for each object will be chosen by the CMC and approved by the BOD.

3. Methods of disposition:

a. Placement in another tax-exempt public institution by gift, transfer, exchange.

b. Transfer the permanent collection to the research/teaching collection.

c. Public sale.

d. Destruction.

4. Disposition Requirements and Restrictions.

a. No WAHS BOD or staff member who advised on the deaccession process will acquire the deaccessioned object(s) nor will that member's family acquire the objects(s).

b. Permanent removal and disposition of deaccessioned objects shall be done in an ethical and legal manner.

c. Permanent removal and disposition of the deaccessioned objects will be used solely for collections acquisition and preservation.

d. A permanent record of the deaccessioned object and their disposal will be maintained by the WAHS with the other accession records.

E. Deaccessioned items that are sold will be sold at public auction, or at the discretion of the WAHS BOD.

VI. Incoming Loans

1. In order to meet its exhibition, research and educational goals, the WAHS BOD will undertake, as appropriate, incoming and outgoing loans of objects. The BOD must approve all incoming and outgoing loans.

2. All loan transactions will be for a specific period of time with an option for renewal.

3. All objects on loan to the WAHS must be covered by the lender's own insurance.

4. Incoming loans will receive the same care, handling precautions, and security as the WAHS permanent collection.

5. Any object borrowed from the WAHS is the responsibility of the borrowing individual or organization and must be returned in the same condition it was in when borrowed. Objects must not be cleaned, repaired, or altered without written permission of the WAHS BOD.

VII. Access to Collections

The Collections are an educational resource and will be accessible for research. The following guidelines and rules apply:

1. Researchers will bear the cost of reproducing records or of any other services they

request.

2. Researchers are subject to restrictions of normal operating hours, exhibition requirements, availability of space, research requests from other researchers, and staff availability and time necessary to assist the researcher.
3. Rules for handling are established and enforced.
4. Use of an item may be restricted due to its condition or for legal privacy reasons.

VIII. Insurance and Risk Management

For the collection as needed.

IX. Records and Inventory Documentation

Documentation for the collections held by the WAHS includes the physical description of the item(s), the previous ownership of the item(s) when this is known, the history and use of the item(s). The documentation may be electronic or hard copy paper records. The current catalog system is maintained in a software program.

X. Outgoing Loans for Exhibition

Museum holdings may be lent for exhibitions at qualified institutions. Museum staff approves items for external exhibitions with consideration of the following conditions.

1. The item is available and not needed for other WAHS exhibitions or programs.
2. The item is in suitable physical and aesthetic condition.
3. The item can be provided with suitable conditions for its care and safety.
4. The item is presented in a manner that preserves its intellectual integrity, i.e., portraying its intended meaning in proper context.
5. The borrower assumes all costs of the loan, including documentation, transportation, conservation and insurance.
6. The borrower agrees not to use the loaned items for commercial or other revenue-generating purposes.
7. The borrower gives appropriate credit to WAHS.
8. WAHS does not loan items to individuals.

XI. Glossary

Accession: (1) item(s) added to the collection; (2) the act of recording/processing an addition to the collection.

Acquisition: an addition to the collection, by purchase, donation, transfer, exchange, or bequest, for which title is given to WAHS.

Collection: tangible objects owned by WAHS for the public trust and intended to be held for the foreseeable future, to be cared for and accessible.

Deaccession: (1) item(s) removed permanently from the collection; (2) the process of removing an item permanently from the collection.

Preservation: measures that prevent or delay future degradation of collections, e.g., the provision of environmentally sound and secure storage, the restriction of access to fragile items.

Provenance: the place of origin or source, the history of transmission of ownership. **Restriction:** limit or restraint on the use of an item.

Prepared by: WAHS BOD Committee and Collections Management Committee (2026)

Adopted by the BOD