

Stewart Bell Jr. Archives
Handley Regional Library & Winchester-Frederick County Historical Society

Collection Development Policy

Mission

The Stewart Bell Jr. Archives collects, preserves, and facilitates access to materials documenting the history and culture of the City of Winchester and Frederick County, Virginia, as well as the Northern Shenandoah Valley region more broadly.

Organizational History

In 1979, the Handley Library and the Winchester-Frederick County Historical Society mutually agreed to establish an archive, located at the Handley Library, to house, preserve, and manage access to materials collected by both organizations. The Joint Archives Committee, a board consisting of members appointed by the Library and the Historical Society, oversees operations, policies, and procedures of the Stewart Bell Jr. Archives.

Since its founding, the Archives has continued to develop its collections through acquisition of manuscript and archival materials, maps, historical newspapers, publications, genealogical records, images, oral histories, and ephemera. These collections support historical and genealogical research into the people, history, and culture of the Winchester-Frederick County area and the Northern Shenandoah Valley.

Statement of Purpose

This document provides a framework for selecting materials to ensure that acquisitions are consistent with the mission, priorities, and resources of the Stewart Bell Jr. Archives. It is intended to be used in conjunction with current policies and procedures. It complies with standard practices of archives and special collections repositories as defined by the Society of American Archivists and other professional organizations.

What do we collect?

The Stewart Bell Jr. Archives actively seeks original manuscript and archival materials, as well as secondary sources, which document the history of the Winchester-Frederick County area. This includes those parts of Frederick County that have since become counties in Virginia and West Virginia (Berkeley, Clarke, Grant, Hampshire, Hardy, Jefferson, Morgan, Mineral, Page, Shenandoah, and Warren). Materials from the Lower Shenandoah Valley, Virginia, adjoining states, and some national material will be considered if they provide a broader context for research.

Collection Strengths and Developing Areas

The Stewart Bell Jr. Archives holds a wide range of materials that further the understanding of the civic, social, religious, cultural, political, and economic history of the Winchester-Frederick County area from the first period of European settlement in the mid-1700s to the present.

Collection strengths include manuscript and archival collections documenting the area's early history in the mid to late-eighteenth century, the Civil War period, African American history, church and organizational histories, and business records. Material is held in all formats, including photographs, maps, microfilm, historic newspapers, and oral histories. In addition, the Archives holds numerous genealogical collections, published genealogies, and compiled genealogical records.

We seek materials that expand on our strengths and build on areas of emerging strengths. Materials that speak to the experience of groups typically underrepresented in the archival record, and materials that document the diverse communities that shaped and continue to shape this region's history are desired additions to our collections.

Selection Process

The Archives Manager is responsible for reviewing all items offered for donation and may actively seek material to acquire through auction or private sellers. In most cases, the Archives Manager will determine what will be accepted based on criteria established by the Collection Development Policy and approved by the Joint Archives Committee. The Archives Manager may consult the Joint Archives Committee in instances where the material offered is not aligned with the Policy or offered for purchase above the amount authorized for acquisition expenditures.

Materials collected include, but are not limited to:

- Manuscript material to include personal and family papers such as letters and other forms of correspondence, diaries and journals, professional papers, legal documents, scrapbooks, photographs, and ephemera.
- Archival records of organizations (institutions, businesses, civic groups, and churches) that illustrate the purpose, activities, and policies of the organization in question.
- Genealogical records to include family histories, family groups sheets, pedigree charts, family Bible records, and other material that documents the history of individuals and families with ties to the Winchester-Frederick County area.
- Maps (original and published or reprinted)
- Photographs, with identification. Original photographic prints and negatives are preferred but the Archives will make and accept digital scans.
- Yearbooks for public and private schools within Winchester and Frederick County.
- Newspapers published within the Lower Shenandoah Valley (not the *Winchester Star*).
- Audio-visual materials.
- Rare books. Winchester imprints are specifically sought.
- Monographs and other scholarly works.

Material in all formats will be considered, but acquisition of audio-visual and "born digital" material may be limited. The Archives does not have a program for reformatting commercially available or privately created disk or tape formats. Outmoded, discontinued or dated formats will usually not be acquired.

Currently, the Archives cannot store, preserve, and provide access to a large amount of born digital materials. Individuals or organizations offering digital records should contact the Archives Manager to determine the best course of action.

The Stewart Bell Jr. Archives may not accept everything that is offered because of constraints on space, staff time, and resources. Please note that duplicates, empty binders, folders, covers, picture frames, irrelevant material, and publications neither by nor about the collection creator will be disposed of during processing. In addition, there are several categories of material that will generally not be accepted.

Types of Material Generally Not collected by the Stewart Bell Jr. Archives

- Material that duplicates items already held in existing collections.
- Material readily available online through databases and other websites will not be accepted.
- Original materials are preferred. Photocopies and facsimiles of materials are accepted under special circumstances (i.e. the original materials are no longer in existence or are damaged beyond repair.) The Archives will not accept copies of materials held at another collecting institution.
- Unidentified photographs will be accepted on a case-by-case basis depending on whether they can be identified through other means or their intrinsic historical value. A small number of unidentified photographs in a larger collection may be acceptable.
- In most cases the Archives cannot accept complete family Bibles because of space considerations. Exceptions will be made for Bibles printed in Winchester. The Archives will scan and preserve family Bible records.
- Large, framed items, artwork and artifacts are rarely accepted. Smaller artifacts may be considered if they have historical value and are part of a larger collection of records or papers.
- Plaques, awards, and trophies are usually not accepted. A list of honors or awards attached to the collection finding aid will serve to document accomplishments.
- Day-to-day financial records (particularly from the twentieth century onwards) such as bank statements, canceled checks, receipts, invoices, and daily balances. Annual financial reports will usually suffice.
- Material that is in unstable condition, or will require undue expense to be stabilized, will generally not be accepted. The Archives must be able to provide ongoing professional care for the incoming material that will not compromise its ability to care for other parts of its collection.

Acquisition Process: Conditions and Terms of Acceptance

Material must fit the current Collection Development Policy. All material will be appraised for historical and research value before being accessioned into a collection. The Archives Manager will determine the appropriate placement of all newly accessioned material according to archival standards and the established processing procedures of the Stewart Bell Jr Archives. The

Archives is not able to promise that material will be placed on exhibit, used in a specific manner, or added to a particular collection as a condition of accepting the gift.

The Archives will comply with all local, state, and federal laws in deciding whether or not to accept items into its collections.

Organizational Records

Before the Archives accepts materials from a currently operating organization or institution, the group's governing body must pass a motion stating that it would like to house its records in the Stewart Bell Jr. Archives. A copy of the minutes with a record of the approved motion then needs to be attached to the Deed of Gift. Any materials added to the collection thereafter will be appraised and accessioned according to current policies and procedures.

Sample Motion:

"We move to house the records of [name of organization] in the Stewart Bell Jr. Archives, Handley Regional Library & Winchester-Frederick County Historical Society."

Material is acquired through the following methods:

Donation: Most materials are accepted via donation. The donor must be the owner of the collection or be authorized by the owner to transfer the title of the collection to the Archives. The donor must sign a deed of gift, transferring title to the physical property to either the Handley Regional Library System or the Winchester-Frederick County Historical Society.

In most cases, donations are accepted in the Archives by appointment during normal operating hours. The Archives Manager may be able to make home or office visits to review material in advance of donation.

The Stewart Bell Jr. Archives makes every effort to process materials in a timely manner, but it cannot guarantee the availability of materials to researchers by a given date.

The Stewart Bell Jr. Archives endeavors to make collections freely accessible to researchers. Material with blanket restrictions on access will not be accepted. However, the Archives will make reasonable and equitable restrictions for limited periods.

Gifts to the Stewart Bell Jr Archives are deductible from taxable income in accordance with provisions of Federal Income Tax laws. Archives staff cannot advise donors on tax matters, nor can they provide appraisals to establish the tax-deductible value of the donated items. Donors may wish to seek the advice of a professional appraiser and/or tax attorney at their own expense.

Material may be digitally reformatted, and existing digital content may be migrated to new technical environments, as appropriate, for preservation and/or access.

Purchase: The Archives Manager's budget for purchasing materials is \$100.00. Purchases over \$100.00 must be approved by the Collections Sub-Committee of the Joint Archives Committee.

The Collections Sub-Committee consists of five members approved by the Joint Archives Committee. The Chair of the Sub-Committee will be a member of JAC, but other members do

not need to be part of JAC. The JAC Chair and the Archives Manager serve in non-voting, advisory roles.

The Collections Sub-Committee is responsible for appraising the historical and research value of potential acquisitions, determining if they fit within the scope of the Collection Development Policy, and setting a maximum price for purchase, up to \$5,000.00.

Meetings of the Collections Sub-Committee may take place in-person or virtually when the need arises. A quorum consists of three voting members.

Transfer of custody: Material may be accepted by transfer from the collections of another institution.

Loan: The Archives may accept temporary loans of material for periods of one year or less. Long term loans are generally not accepted. Exceptions to this policy must be reviewed by the Archives Manager and discussed and approved by the Joint Archives Committee. All loans will be subject to the terms of the “Loan Policy.”

Orphaned Collections and Conversion of Unclaimed or Old Loans: Orphaned collections are those collections which lack documentation and clear provenance. These may derive from undocumented door stop donations or material “found in collection.” Unclaimed and/or old loans are those items that are accompanied by some evidence of documentation of a loan.

Any such items may be accessioned into the permanent collections of the Stewart Bell Jr. Archives if they meet the acquisition criteria. Orphaned items will be recorded as either “undocumented donation” or “found in collection.”

Old loans shall become property of the Stewart Bell Jr. Archives if they have a documented history of being in its collections for five (5) or more years and attempts to locate owners are unsuccessful or untenable. This is in accordance with Code of Virginia, Chapter 26. The Archives may use these items for research, exhibit, and educational purposes while possible ownership is being researched. The Archives Manager is responsible for documenting all efforts to establish the source of materials.

Purpose and Use of Collections

Collections belonging to the Stewart Bell Jr. Archives are primarily intended for use for study and research, and other educational purposes which may in some cases lead to publication. The Archives may use material for exhibits or educational programming. Material may be loaned to other organizations for exhibit. The Archives may publish materials for scholarly purposes and to further its mission.

Deaccessioning and Disposition

The re-evaluation of previous appraisal decisions is an ongoing part of collections management undertaken to identify materials that would not be accepted under current policy or materials that are no longer appropriate to the repository’s mission. The Stewart Bell Jr. Archives may deaccession items from its collections under certain circumstances and with careful

consideration. Items may be considered for deaccessioning based on the following criteria:

- The material falls outside the scope of the Collection Development Policy.
- The material is a duplicate or excessively redundant copy of material already in the collection.
- The Archives has acquired an example of the material that is in better condition and/or has better provenance.
- The item has deteriorated beyond a point where it can be reasonably conserved.
- If, according to current professional standards, the Archives can no longer properly maintain and care for the material.
- The material threatens the health or safety of staff, visitors, or other collection items and this condition cannot be remedied.

Deaccessioning Process

Archives staff may propose candidates for deaccession. The Archives Manager will describe reasons for deaccessioning and recommendations for disposition in the deaccession record. The Joint Archives Committee shall review each candidate for deaccession before voting to reject or approve the recommendation. Decisions shall be recorded in the Committee meeting minutes, and a copy placed in the relevant control folder. The Archives Manager is responsible for maintaining a permanent record of any deaccessions and their disposition.

Disposition

The decision about the method of disposition is separate from the decision to deaccession and is determined by the Archives Manager.

The Archives Manager will attempt to return deaccessioned materials to the donor only if required by the deed of gift. Items, may be transferred, sold, or destroyed if good faith efforts to contact the donor are unsuccessful.

When deaccessioned materials are of historic value, the Archives Manager will try to place them with another museum or collecting institution where they will be accessible to the public.

Material that is deemed extremely deteriorated or a health hazard will be destroyed.

Deaccessioned materials destined for sale must only be sold at venues to which the general public has access.

Deaccessioned materials will not be given to or sold to Stewart Bell Jr. Archives employees, volunteers, or their immediate families.