Policy Title: Research Policy & Procedures	Category: Policy
Policy Type: Curatorial	Approved: April 21, 2025
	Revised:
Monitoring Frequency: Every three years	Starting When: April 2028

Policy Statement

The Western Development Museum (WDM) conducts research on its artifact collection and on the human history of Saskatchewan in the modern period (c. 1870s-present day). The purpose of this research is to accurately interpret the past through collection development, exhibit development, internal and external publications, and education and public programs. Through a commitment to producing and disseminating publicly accessible contributions based on original and compiled research, the WDM will help broaden Saskatchewan people's knowledge of their history as part of its mandate to stimulate interest in the history of Saskatchewan.

The WDM commits to conducting a high standard of research excellence, following evidence-based multidisciplinary research methodologies in history (and other related humanities and social sciences), museology, conservation, cultural heritage management and curriculum studies. The WDM supports research excellence by providing adequate resources to carry out these activities and encouragement to disseminate research to a broad audience and WDM stakeholders through internal and external channels like publications, conferences, media interviews and online media.

Purpose

The *Research Policy* outlines the responsibilities and standards for research that WDM staff, students, interns, and volunteers conduct in the normal course of their work. The *Research Policy* does not outline the conditions of other forms of research the WDM may undertake, such as market or financial research.

The *Research Policy* outlines conditions of internal (staff, students, interns and volunteers) and external (public and other researchers) access to the George Shepherd Library (GSL). The *Collection Management Policies* outline access to Permanent Collection and Operating Collection artifacts and file material(s) for the purpose of research.

The *Research Policy* outlines the copyright regulations for WDM produced materials as well as conditions related to image and photographic use, reproduction requests and licensing.

Scope and Authority

The Curatorial Department manages the above research functions of the WDM and supports other departments with their research needs as required. To support the research activities of the Museum, the Curatorial Department oversees the George Shepherd Library (GSL), a small

non-circulating, non-lending research library housed at the Curatorial and Corporate Services Centre. The Collections Manager manages the GSL.

The GSL consists of books, monographs, magazines, reports, pamphlets, catalogues, manuals, manuscripts, published and unpublished documents, photographs (printed and digital), online subscription services (i.e. ancestry.ca and newspapers.com), and other media types related to Saskatchewan and Western Canadian history, artifacts in the Collection and museology.

Management of, including accessions to and deaccessions from the GSL Collection, is outlined in the *Collections Management Policies*.

The non-accessioned, uncatalogued WDM corporate archive is maintained in the GSL. Staff may deposit materials into the corporate archive by contacting the Registrar. This archive contains promotional, photographic, pamphlet, newsletter and some file material related to WDM exhibits, events, programs and miscellaneous information. It does not contain personnel or financial records. There is no acquisition plan for this archive; its development has always been ad hoc.

The WDM will maintain the collections of the GSL to support the research activities of WDM staff, students, interns and volunteers as well as approved external researchers. Within the limits of its resources, the WDM will arrange and catalogue the library collection to a minimum standard, understanding there is a significant backlog of accessioned, uncatalogued material that was deposited in the library for decades without sufficient resources to arrange it and catalogue it.

Revision and Approval

The *Research Policy* will be reviewed every three years from its effective date. The Chief Curator – Director of Collections & Research will develop the *Policy* in consultation with Curatorial Department staff. Other staff and stakeholders may be consulted. The *Policy* may be revised before that time to make necessary updates and ensure it reflects current standards, ethics and legislation. The Chief Executive Officer approves the *Policy* and any changes to it.

The Chief Curator – Director of Collections & Research will prepare a *Curatorial Plan* for the WDM on a five-year cycle, outlining the curatorial research priorities and thematic areas of focus in accordance with the mandate of the Museum. This should be used in tandem with the *Collections Development Plan*. The Curatorial Committee reviews the *Curatorial Plan* and submits it to the CEO for final approval.

Research Standards

Research undertaken at the WDM will be compliant with the Canadian *Copyright Act*, the *Ethics Guidelines* (2006) and the Mo*ved to Action: Activating UNDRIP in Canadian Museums* (2022) set by the Canadian Museums Association (CMA); the *Standards for Saskatchewan Museums – 6th*

Edition (2022) set by the Museums Association of Saskatchewan (MAS); and the *Statement on Research Ethics* set by the Canadian Historical Association (CHA).

Research projects and materials will be completed using accepted best practices in professional historical research and related disciplines, incorporating a wide range of both primary and secondary sources. Sources must be reputable and ideally peer reviewed. Non-acceptable sources would generally include Wikipedia, social media and other unsourced materials.

The perspectives of many groups will be consulted to ensure an unbiased account of Saskatchewan history. Where possible, community-engaged research partnerships will ensure the voices and perspectives of marginalized groups are properly represented.

To ensure high levels of research excellence are maintained and to foster a research environment at the WDM, the Chief Curator – Director of Collections and Research will hold professional memberships in good standing with organizations such as the Canadian Historical Association and an adjunct appointment in a Canadian university history (or related field) department. The Chief Curator – Director of Collections and Research will keep up to date on research standards and practices and communicate them to WDM staff responsible for performing research activities.

Bibliographies and citations

All bibliographies, footnotes, endnotes and other citations in research documents will follow the *Chicago Manual of Style* and must be fully cited in final submissions saved in the WDM's information management system and other filing locations.

Final exhibit text, education materials, internally published articles, blogs, online content and other collateral may not include all bibliographic citations, or may contain an abridged version, for ease of visitor experience.

The WDM *Style Guide* sets further standards for citation conventions in internally produced products. All WDM-produced material must also comply with branding standards.

Use of Artificial Intelligence in content creation

Artificial Intelligence (A.I.) tools should be used sparingly and carefully in the creation of museum content (i.e. exhibits, programs and content-driven publications). Whole pieces of exhibit text, artifact labels, program scripts, cataloguing records, social media posts, and internal and external publications (i.e. *Sparks* articles) should be original, author-created works.

A.I. may be used to clarify, synthesize, edit, or organize and arrange original texts. A.I. may also be used to streamline and format bibliographic citations. Any use of A.I. in this manner must be carefully reviewed to ensure the information, tone and intent of the original text is maintained.

A.I. should not be used as an historical research tool as the traditional research methods noted above are more reliable.

A.I. generated products and collateral for advertising or marketing purposes will be guided by policies in the Community Engagement Department.

Copyright Adherence in WDM-Produced Materials

The goal of Canadian copyright and plagiarism rules and laws is to protect artists, authors and creators legally and financially from having their work used without their consent "while promoting creativity and the orderly exchange of ideas."[1] While there are allowances in copyright law made for educational institutions, libraries, museums and uses of material where there is no financial gain, the WDM has a moral responsibility to seek permission and give proper credit for works it uses.

When creating material for the WDM:

- Do not use any photo, illustration, or graphic with copyright watermarks across it.
- Do not use photos, illustrations, or graphics found on the internet or books without explicit permission from the creator. This includes materials produced by companies at any time in history; these remain copyrighted materials (i.e. a John Deere tractor advertisement produced in 1900 is still copyrighted).
- Do not copy or reproduce whole texts from the internet without permission. This includes things like craft instructions and recipes.
- Do not use material from websites with copyright declarations without explicit permission from the website's owners.
- Do not use material from the collections, exhibits, or websites of other libraries, archives or museums without asking for explicit permission from the organization. This includes photographs of other museums' exhibit content. A credit line is required.
- Do use any photographs that have lapsed into the Public Domain. Photographs produced before January 1, 1949 are almost always in the Public Domain. Credit the archive or other institution wherein the image is held even when the photograph has lapsed into the Public Domain.
- Do use any WDM-produced images and photographs created at any time in history as we own that copyright. Credit the WDM.

Oral Histories

Oral history research on artifacts in the Permanent Collection is a regular part of museum cataloguing. Prospective artifact donors will be informed by the Registrar prior to signing a donation agreement that they may be asked to share more about an artifact's history with the Research Associate. They may decline but this may affect the ability of the WDM to accept their donation if information about its history is limited. Information obtained in the course of oral

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[1] "Understanding Copyright - The Basics," Government of Canada. Accessed at: https://www.ic.gc.ca/eic/site/cipointernet-internetopic.nsf/eng/h_wr02281.html?Open&wt_src=cipo-cpyrght-main&wt_cxt=learn on March 14, 2025.

history research on artifacts is stored in the restricted artifact file, collections management software and the WDM's information management system.

The WDM may engage in oral history projects outside of the normal course of artifact and cataloguing research. Oral history projects will be developed and completed using community-engaged research practices and ethics derived from sources such as university ethics standards, standards from the CMA, MAS and/or CHA.

WDM staff and students, and interns will be trained in oral history methods prior to engaging with participants in oral history projects either by their own previous post-secondary study or under the supervision of the Chief Curator – Director of Collections and Research supplemented with professional development.

The WDM will be sensitive to the unique needs of participants in oral history projects, particularly for historically marginalized groups. The WDM will provide information about community counselling services to participants when dealing with sensitive or difficult histories. The United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) will be activated and complied with when Indigenous participants are involved in oral history projects.

The WDM will ensure oral history participants understand the nature of their participation and the value in the creation of historical knowledge for the benefit of future generations. Oral history project participants will be invited to complete and sign an oral history participation agreement designed for each project, which will outline the terms of their participation (i.e. their consent), moral rights, copyright, project goals, outcomes and intended outputs, future use and freedom of information, confidentiality, data protection and privacy controls, and be offered a mechanism by which to decline or withdraw at any time. Signed agreements will be stored in the WDM's information management system. Consent forms and interviews (including videos, photographs and transcripts) will be accessioned into the GSL Collection and stored in the WDM's information management system and in the collections management software.

Research Inquiry Terms of Service

The Curatorial Associate oversees public research requests and inquiries in person, by mail, email and phone. The Content Specialist will assist the Curatorial Associate with internal staff requests in certain cases such as with programming staff. Other Curatorial Department staff, and sometimes staff in other departments, will be asked for their assistance or expertise in handling a research inquiry that pertains to their line of work (i.e. a steam question may be forwarded to the Chief Steam Engine Operator).

The service standard to complete research requests and inquiries is two to four weeks. Some inquiries take longer due to the availability of materials or complexity of the question(s).

The Curatorial Associate may use the GSL Collection, the Permanent and/or Operating Collections and files, and/or external resources to answer the research inquiries, or may forward the researcher to a more appropriate museum, archive, library, or holding company.

The WDM will not conduct genealogical or any other lengthy research for researchers. A maximum of two hours will be spent per research inquiry.

The Curatorial Associate will record all research requests, inquiries and visits to both the GSL and the Permanent and/or Operating Collections on a tracking sheet stored in the Office 365 system and arrange the information by fiscal year for reporting purposes.

George Shepherd Library (GSL) Use

As part of its public trust responsibilities, the WDM will make the GSL Collection accessible, with some conditions of use.

Standard practices of library and archival handling and care of the GSL Collection will be communicated to all users. Material will be returned in the same condition it is lent. Failure to return materials in an acceptable condition, or if willful damage is noted, will result in loss of access to and use of the collections.

The WDM reserves the right to restrict access to the GSL Collection to ensure its preservation.

Internal use of GSL Collection – WDM staff, students, interns and volunteers

The use of catalogued and uncatalogued material in the GSL is self-serve for staff, students and interns. Materials may be signed in and out using the sign-out sheet provided, including photographs from the photograph room.

Materials may not leave the building without permission of the Collections Manager and only for defensible reasons such as for use in an exhibit or at another location for an approved purpose (i.e. a restoration project where a manual is required and making a copy is prohibitive or contravenes the *Copyright Act*). Materials should be returned within one calendar year of signing out. Materials may be renewed for another one-year period, and so on, with no limit.

The use of catalogued and uncatalogued materials by volunteers will be supervised by the volunteer's supervisor, if approved by the Collections Manager and, if necessary, in consultation with the Chief Curator – Director of Collections & Research.

External use of GSL Collection – approved researchers

The WDM will facilitate access to the GSL Collection within reasonable limits for bona fide external researchers (public and other researchers) to support their research efforts.

In-person use of the GSL Collection for external researchers is managed by the Collections Manager in consultation with the Chief Curator – Director of Collections & Research. The

Curatorial Associate will forward requests to the Collection Manager who will ask the researcher to submit the following as application for an in-person visit:

1. A list of materials exclusively available in the GSL and evidence the material is not available elsewhere (i.e. a list of other libraries and archives consulted);
2. Confirmation that they are a bona fide researcher, curator, or museum professional, belonging to a university, college, First Nation/Métis Nation, government department, school board, consultant firm, historical society, museum, library, archives or similar institution; a letter of referral from a supervisor or the institution may be required;
3. A research proposal that describes the research project, brief bibliography and the intended outcomes (i.e. publication, conference presentation, etc...)

Applications will be highly selective due to limited resources to accommodate in-person research visits and the availability of much of the material in the GSL elsewhere. Approved applicants will be limited to two hours per week of research time and three months access at which time they may submit a new proposal. Exceptions to these time limits for visiting scholars residing outside of Saskatoon will be considered on a case-by-case basis and dependent on staff availability.

The use of uncatalogued material for external researchers will be approved at the discretion of the Chief Curator – Director of Collections & Research.

Exceptional cases without application will be considered by the Chief Curator – Director of Collections & Research as they arise (i.e. an external partner researcher working with the WDM may be granted access to GSL materials without application while co-developing a project).

Reproduction

GSL materials, unrestricted or redacted artifact file material, and WDM owned photographs, products, collateral and publications may be reproduced in accordance with the *Copyright Act*.

For most external research requests and inquiries, the Curatorial Associate will recommend reproduction of material rather than application for an in-person visit. Fees for reproduction requests are outlined in the *Reproduction Fee Schedule*.

For external reproduction requests for uses other than personal research, user fees will apply, and a *Terms of Use and Licensing Agreement* will be negotiated and signed, setting out the permissions for use. In cases where the WDM does not own copyright, the researcher must seek copyright permission from the author(s) of the material. The onus is on the researcher to secure copyright permission.

No fees or licenses are required for internal WDM uses. The Curatorial Associate will address any copyright concerns for internal WDM uses.

The WDM reserves the right to restrict reproduction if copyright concerns exist, if the condition of materials is unsuitable for reproduction, if its use would be detrimental to the reputation of

the WDM, or for any other reason it deems fit. The WDM reserves the right to limit photographic reproduction requests to 19 images per external researcher, per year. The final decision to reproduce rests with the Chief Curator – Director of Collections & Research.

Crediting WDM materials

The *Terms of Use and Licensing Agreement* sets out criteria for crediting WDM materials and collections for external researchers and users.

The WDM *Style Guide* sets out criteria for crediting WDM materials and collections in internally produced WDM materials.

Authorship, Copyright and Intellectual Property

As a public research and publishing institution, the WDM must comply with the Canadian *Copyright Act*. The Chief Curator – Director of Collections & Research oversees copyright compliance, shares awareness about copyright and advises the CEO on copyright matters.

Internal copyright questions and concerns may be forwarded to the Curatorial Associate for clarification.

Any 'work' authored internally (i.e. exhibit text or *Sparks* article) during a staff member's employment or student internship with the WDM, as well as WDM volunteers writing for the WDM, will remain the intellectual property of the WDM, unless an agreement with the CEO is negotiated stating otherwise.

Any 'work' authored and published externally (i.e. in a journal or magazine) during a staff member's employment or student internship with the WDM, as well as WDM volunteers writing about the WDM, will remain the intellectual property of the author. In some cases, the author may be 'the WDM' (i.e. a feature in a tourism magazine); in other cases, the author may be the staff member, student intern, or volunteer (i.e. a peer-reviewed history journal).

A shared copyright agreement must be negotiated between the parties for any 'work' co-authored internally (i.e. co-curated exhibit text created in partnership with a community partner). Shared copyright agreements will be reviewed every five years unless the partners prefer another term. Any 'work' co-authored and published externally will remain the intellectual property of the co-authors. In some cases, one of the co-authors may be 'the WDM' (i.e. exhibit text).