

Marion County Historical Society

3.1 Collections Policy

The Marion County Historical Society (MCHS) is a non-profit organization incorporated under the laws of Oregon. It seeks to promote historical research and educational programs through the collection, preservation, study and exhibition of historical information, objects, materials, buildings, sites and monuments relating to Marion County.

- A. Purpose of this Policy
- B. Definitions
- C. Accessions
- D. Deaccessions
- E. Auxiliary Materials
- F. Incoming Loans
- G. Outgoing Loans
- H. Public Access to Collections

This collection policy refers to the artifacts, archives and photographs to be maintained by the Marion County Historical Society. They serve as local examples of history and can be used to interpret Marion County history in a state, regional and national context as outlined in the interpretive plan.

A. Purpose of This Policy:

- A. To establish the policies and guidelines for acquiring material for the collections.
- B. To establish the policies and guidelines for removal of material from the collections.
- C. To establish conditions under which materials may be lent from the MCHS's collections and borrowed from other museums, institutions and private sources.
- D. To establish policies for access to the collections.
- E. To ensure that standards of documentation and collections management for artifacts meet accepted museum standards.
- F. To affirm that the highest ethical standards continue to be met by the Marion County Historical Society, its members, its staff, and its volunteers.

B. Definitions:

Accession: The formal process in accordance with the accession policy criteria used to accept, identify and to record an object as a permanent collection object. The object may either be donated, purchased, exchanged, or acquired by any other transaction whereby it formally becomes the legal property of MCHS.

Accession Process: Written process for the acceptance, donation, documentation, recording, numbering, identifying and storing an item to be accession into the MCHS collection.

Auxiliary Materials: A class of objects (i.e., library books, education objects) which are not accessioned as part of the permanent collection, but serve as a support or resource to the permanent collection for research and/or interpretive purposes. The object may either be

donated, purchased, exchanged, or by any other transaction whereby it formally becomes the legal property of the museum.

Conservation: The application of science to the examination and treatment of museum objects and to the study of the environment in which they are placed.

Deaccession: The formal process in accordance with the deaccession policy criteria used to remove an object from the permanent collection.

Disposal: The process of physically divesting the MCHS of an object in its possession in accordance with the collections policy.

Donor: An individual who has signed over title of ownership of objects to the MCHS free of charge.

Donor Agreement: A contract that transfers title of ownership of an object or objects from a donor to the MCHS. This is sometimes referred to as a Deed of Gift.

Incoming Loan: The temporary transfer of collection objects from another museum, institution or individual to the MCHS for stated purposes. The transfer does not involve a change of ownership.

Object Found in the Collections (OBIC): An object that lacks any significant documentation of accession status.

Permanent Collection: A group of objects which have been selected in accordance with the museum's mission and accession policy criteria by means of a formal process, which the museum holds legal title, and thus, is held in public trust.

Outgoing Loan: The temporary transfer of collection objects from the museum to another museum, institution, or individual for stated museum purposes. The transfer does not involve a change of ownership.

Preservation: The act or process of applying measures to sustain the existing form, integrity, and material of a building or structure, *collection artifacts* and the existing form and vegetative cover of a site. It may include initial stabilization work, where necessary, as well as ongoing maintenance of the historic building materials.

Provisional Deposit: Any object deposited with the museum for consideration as a potential donation or purchase for the MCHS's purposes.

Restricted Cash Donation: A donation of monies designated for a specific purpose stipulated by the donor at the time is given to the MCHS.

Unrestricted Cash Donation: A donation of monies which is not targeted for a specific purpose by the donor at the time it is given to the museum.

C. Accessions

I. Every effort shall be made to accept only those objects into the permanent collections which fit the MCHS mission statement, have potential use in the research or interpretation of Marion County's history, and warrant a long-term commitment toward their preservation. MCHS will consider the collecting focus of other historical/cultural organizations in Marion County when accepting objects into the permanent collections. Accessioning is undertaken in order to fulfill the responsibilities of holding objects in public trust. It ensures proper documentation and management of the objects.

II. An object shall be considered for accessioning into the permanent collections only if it meets the following criteria:

- A. An object must be unique, significant or originate in Marion County or West Salem and have a demonstrated and noteworthy significance to places, people or events in the region.
- B. An object must be in reasonably good physical condition or can be conserved within MCHS resources;
- C. An object must be sufficiently complete to convey historical information.
- D. An object must have free and clear title, and shall be offered without restrictions imposed by the donor.

III. No object shall be knowingly accepted or acquired which has been illegally imported into, or collected in, the United States contrary to any applicable law, regulation, treaty, or convention.

IV. The MCHS will not accept objects which contain flammable, unstable, perishable, or toxic materials such as medicines, foodstuffs, household cleaners, toiletries or lubricants. It will be the responsibility of the donor to remove such material before the object is brought to the MCHS for consideration.

V. An object considered for accessioning must be reviewed and approved by the Archival Administrator. While reviewing the object, the Archival Administrator may consult with other people who may be knowledgeable about the object or its significance. Appropriate forms will be completed and signed for all artifacts accepted for accession. All accessions will follow MCHS accession process.

VI. The donor must transfer unconditional title for all objects to the MCHS.

VII. The MCHS and its staff shall not make verbal or written appraisals for tax purposes of objects donated. Donors shall bear the cost of appraisals made for tax purposes. The donor's appraisals, if any, will take place before title to the material is conveyed to the MCHS.

VIII. Objects shall not be accessioned into the MCHS's permanent collections unless the MCHS can provide for the storage, protection, and preservation of the objects under conditions that ensure their physical integrity and availability, in keeping with professional standards.

IX. MCHS staff, board members and contractors and consultants providing collections services will abide by the American Association of Museums Code of Ethics with regard to personal collecting and shall avoid any apparent conflicts of interest in collecting. All potential conflicts of interest should be declared to the Executive Director.

D. Deaccessions

I. The removal of objects from the permanent collections shall be undertaken only after careful consideration. The objectives of the deaccessioning process are to ensure that the collections are representative of the MCHS's mission; to safeguard the permanent collections, staff and public; to reflect changes in the MCHS's mission or collection policy; or to maintain sound collection management practices.

II. An object may be considered for deaccessioning from the MCHS permanent collection only if it meets one or more of the following criteria:

- A. An object does not fall within the scope of the MCHS accession policy and/or cannot serve a foreseeable purpose for research, exhibits or educational purposes;
- B. An object is found to be a clear forgery, replica or reproduction that lacks historic significance;
- C. An object is potentially hazardous to other objects or to human health;
- D. An object is a duplicate of other objects in the collection which are of higher quality, are in better condition, or are more representative of objects used in Marion County in the past;
- E. An object cannot be cared for properly by the MCHS.
- F. An object is in danger of deterioration or destruction and is beyond the resources of the museum to stabilize or conserve.
- G. An object is used for destructive analysis which is deemed to be of more value to the MCHS than retaining the object intact.
- H. An object falls under the primary interpretive goals of other Marion County historical, cultural or archival facilities who have the ability to preserve the item.

III. An object cannot be deaccessioned from the permanent collection without the approval of the Archival Administrator, whose decision will be approved by the MCHS Board of Directors.

IV. A deaccession form must be filled out for each object or set of objects falling under the same donor number. Only the Archival Administrator and Board President may sign this form.

V. Methods of disposition for museum-quality *and high quality useful* objects are to be sought in the following order:

- A. Exchange with or donate to other museum, public or educational institution which intends to make the object accessible to the general public, giving priority to institutions within Marion County, the Willamette Valley and Oregon, in that order.
- B. Use as an auxiliary materials object.
- C. Sale to commercial dealers and private individuals, preferably at a public auction or sale, only in the event that no institution is willing to accept the object.

VI. MCHS staff and board members will not purchase objects deaccessioned from the MCHS unless they are offered at public auction or sale. Under no circumstances is ownership of deaccessioned objects to be transferred directly to members of the staff, the MCHS board of directors, Marion Historical Foundation board of directors or contractors and consultants providing collections services within two years of their service. These individuals may participate in public auctions or sales, however.

E. Auxiliary Materials

I. Objects can be accepted or reclassified as auxiliary materials in the MCHS collection only if they meet the following criteria:

- A. They do not meet the criteria for accessioning into the permanent collections, or are duplicates of other objects in the collection which are of higher quality, are in better condition, or are more representative of objects used in Marion County in the past.
- B. They are not valuable, rare or historically significant.
- C. They have a foreseeable use in hands-on educational programs or living history demonstrations.
- D. They relate to places, people or events in Marion County or West Salem.

II. Auxiliary materials are subject to handling and use, and therefore are exposed to significantly greater wear and deterioration than artifacts in the permanent collections. Such objects are also subject to a greater risk of breakage because they are repeatedly handled and used. They should not, however, be misused or purposefully mistreated. Auxiliary materials should be used by the public under staff or trained volunteer supervision to ensure that such use is within the framework of an educational program. Every effort should be made to install respect and care for historical objects under the jurisdiction of the MCHS.

III. Educational objects to be used for educational purposes should be in sufficiently good condition and sufficiently representative of objects used in Marion County in the past that they serve to effectively teach the public about Marion County history.

IV. A reclassification of an artifact to the auxiliary collection requires deaccessioning the item. When an artifact is assigned to the auxiliary collection, an "E" will be added to the catalog number on the item and their respective records.

F. Incoming Loans

I. The MCHS may seek incoming loans of artifacts which complement those in its permanent collection, which are related to the history of Marion County, or which are exemplary of artifacts used by past residents of Marion County. Artifacts will be taken on loan only if they serve a specific purpose, either for temporary exhibit or for study in relation to a current MCHS research project, and are for a specific period of time.

II. The cost of storage, security, transportation, insurance, the artifact's condition, ability to withstand shipment, the lender's restrictions, and problems of provenance or copyright shall be considered before accepting any loan. The loan must be approved by the Archival Administrator. An incoming loan agreement form must be signed by the Archival Administrator and an authorized representative of the lending institution.

III. The MCHS will not provide free storage or conservation treatment to artifacts loaned to it after term of loan. No long term or permanent loans will be accepted unless the objects are deemed necessary, are unavailable under any other conditions, and are offered by another museum. If the artifacts on long term or permanent loan should be offered as a donation by the lending institution, all regular accession procedures will be followed.

G. Outgoing Loans

I. The MCHS may lend artifacts from its permanent collection to appropriate borrowing institutions which propose a specific use of the artifact. The loans will only be for a specified period of time.

II. Requests for outgoing loans shall be in writing by an authorized representative of the requesting institution. Such requests must state:

- A. The intended use of the artifacts;
- B. The period for which they are requested;
- C. The environment in which they will be housed (temperature, humidity, light, and protection from biological infestation);
- D. Provisions that will be made to ensure the artifacts' security during the loan, including transportation, delivery, insurance and display.

III. In evaluating requests for the loan of artifacts, the MCHS Archival Administrator will consider:

- A. The artifact's condition and its ability to withstand shipment. Artifacts which are extremely rare or fragile, or are in need of extensive conservation may not be considered available for loan;
- B. The current needs of the MCHS.
- C. The restrictions set forth by the borrower and the borrower's ability to care properly for the artifact.

IV. Artifacts may not be removed from an MCHS exhibit for an outgoing loan unless a replacement can be found for the object and it is deemed by the Archival Administrator that such a loan would be in the best interest of the MCHS.

V. All objects on loan must be housed in acceptable environmental conditions by the borrowing institution, as similar as possible to those in which they are housed by the MCHS. All objects on loan for public exhibit must be placed in locked or otherwise secured cases or exhibit spaces. Artifacts on loan for research must be kept in an area of restricted access. Objects may not be altered, embellished, modified or dismantled in any way. No mounts which leave marks or evidence on the artifacts, or could potentially harm its physical integrity, may be used.

VI. If the loan of an artifact receives favorable consideration from the Archival Administrator, an outgoing loan agreement form will be completed and signed by the Archival Administrator and an authorized representative of the borrowing institution. The borrower must be another *bona fide cultural, historical, scientific or educational institution. In some cases, loans may be granted to another type of institution when the good of the MCHS and the edification of the general public will be served by such a loan.

VII. Loans of objects valued at \$2,000 or more must be approved by the MCHS board of directors.

H. Public Access to the Collections

I. Public access to the collections will be granted in the context of a legitimate research project, subject to the restrictions imposed by exhibit requirements, the status of outgoing loans, availability of study space, and the availability of staff.

II. Individuals who wish to gain access to the collections must demonstrate that such access is an integral part of a personal, academic or museum research project by filling out a research request form.

III. Access will be limited to only those collection objects which they wish to observe or study in a controlled space such as a workroom. A staff member or a specially trained volunteer appointed by the Archival Administrator must be present at all times when collection objects are being handled by an outside researcher. The condition of the objects must be noted by the staff person before and after access has been granted. A full accounting of all objects to which access has been granted should be made before the researcher is allowed to leave.

IV. Under no circumstances will collection objects be allowed to leave MCHS premises for research or any other purpose without the completion of an outgoing loan agreement by the outside researcher and the Archival Administrator.

V. Under no circumstances will public access be granted to objects which are on loan to the MCHS.

VI. Reference materials from the MCHS research library are non-circulating and must be used on MCHS premises.

VII. The MCHS requests a copy of any paper or publication resulting from access to its collections.

VIII. Copying of materials may be restricted by staff.

Adopted by the MCHS Board of Trustees on

_____ Date

_____ Board President

