



# MAINE HISTORICAL SOCIETY

## COLLECTIONS POLICY

Adopted by the Board of Trustees  
May 15, 2003

## **Collections Policy    Maine Historical Society**

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## I. MISSION STATEMENT AND OVERVIEW OF THE COLLECTIONS POLICY

### A. Mission

The Maine Historical Society (MHS) promotes the understanding and enjoyment of Maine history. To carry out this mission we collect, preserve, and exhibit important historical resources and treasures; facilitate research into family, local, regional and national history; and provide educational opportunities that engage the public and make history accessible and meaningful.

### B. Process of Establishing Policy

1. This policy was researched and drafted by a work group of the Collections Committee that included staff and trustees. The Collections Committee, composed of staff, trustees, and volunteers actively reviewed and commented on the policy. The final draft was submitted to the Board of Trustees for comment and acceptance. Formal approval of this policy by the MHS Board validates the authority of this document.
2. This collections policy is to be considered a working document. Any errors, omissions, or other necessary changes will be identified and corrected by library and museum staff, presented to the Collections Committee, and approved by the Board of Trustees in a timely manner. An affirmative vote of 75% of the total membership of Board of Trustees is required for approval of changes to this policy.

### C. General Responsibilities for the Collections

1. The Collections are owned by MHS and held in trust by the Board of Trustees. Collection objects are administered and cared for by the professional staff in accordance to the policies and guidelines outlined in this manual.
2. The Board of Trustees of the MHS is responsible for the care and preservation of all collections. On an annual basis, the Board, through its Finance Committee, establishes a budget to support care and development of the collections of MHS.
3. The Executive Director provides leadership and administrative oversight for library and museum operations, manages the staff, and assists in development of project plans, reports, grants, and other documents as required by the Board of Trustees or other agencies.
4. MHS staff reports to the Executive Director, and is responsible for everyday administration of collection-related activities including managing acquisitions, storage and conservation of artifacts, providing public access to collections, and exhibition planning and development. Staff provides reports to the Collection Committee as needed.
5. The Collection Committee of the MHS acts as liaison between the staff and the Board of Trustees. As outlined in this document, the Committee reviews acquisitions and collecting plans; reviews deaccession proposals and presents recommendations to the Board of Trustees; reviews, prepares and recommends collection-related policies; assists in the development of plans relating to collections; and reports its activities to the Board of Trustees.

## II. COMPOSITION OF THE COLLECTIONS COMMITTEE

A. The Collections Committee of MHS is a committee of the Board of Trustees. All members must be members of MHS and all (except as noted) have voting privileges. The members of the Committee are as follows:

1. The President (without vote) and the Second Vice President (with vote) of the Board (ex-officio).
2. Chair is appointed by the President of the Board and, under the MHS By-laws, must be a Trustee.
3. At least four other Trustees are appointed by the President of the Board after consultation with the Chair of the Collections Committee.
4. Up to four, non-trustee members are appointed by the President after consultation with the Committee Chair.
5. The Chair, or one Co-Chair of the Friends of the Collections Subcommittee.
6. The Chair of the Library Resources Committee (ex-officio).
7. The Executive Director, the Curator of the Museum, the Head of Library Services, and the Registrar as staff representatives to the Committee.

### III. ROLE OF THE COLLECTIONS COMMITTEE

- A. The Collections Committee shall oversee all matters relating to the development, care, use, and management of MHS collections. It shall cooperate with other committees, as appropriate, in MHS endeavors.

The Collections Committee shall:

1. Meet at least six times during the year, or as needed, to conduct its business.
2. Every three years, at a minimum, review and/or update the Maine Historical Society Collections Policy and present the revised policy to the Board of Trustees for approval.
3. Review the annual reports of the Curator of the Museum and Head of Library Services which will include listings of donors to the collections, incoming and outgoing loans, and any other collection-related plans or activities deemed significant by staff.
4. Review all deaccessions, and any acquisitions as needed or required by policy.
5. Review regular reports from staff of all new acquisitions.
6. On an annual basis, and in collaboration with staff of MHS:
  - a. Review and update a written statement of collecting interests.
  - b. Review the MHS Conservation Plan.
  - c. Review the plan of work for the Library and Museum in advance of the budgeting process.
  - d. Review procedures for access and use of the collection.
7. Work in support of staff to develop positive and successful relationships with potential donors to the collections (including individuals, collectors, estate executors, businesses, auctioneers, dealers, and other collecting organizations).
8. Be familiar with the collections and collection-related issues.
9. Be familiar with the balance of funds in any dedicated fund for acquisitions.
10. Establish subcommittees and receive regular reports as appropriate.
11. Work collaboratively with the Friends of the Collections Subcommittee to develop, promote, and enhance the collections and collecting resources of the MHS.
12. Prepare and circulate detailed minutes of each meeting to members of the Committee.

#### IV. STATEMENT OF COLLECTING INTERESTS

##### A. Overview

Collections care and development is a central component of the Maine Historical Society 2000 – 2005 Strategic Plan. In the area of *Collections*, the strategic objective is to “dramatically improve the stewardship of MHS collections by providing

- high standards of physical care,
- cataloging controls that facilitate access,
- collecting strategies that stress quality and breadth,
- strong relationships with donors, and
- cooperation with other collecting institutions in Maine."

As a result, staff plans for collections development are based on two concurrent activities: looking inward to understand the strengths of our collections through survey, re-housing, and inventory; and looking outward to identify future collecting opportunities and build relationships with donors, collectors, and other organizations that have a shared commitment to preserve Maine history.

##### B. Current Collecting Interests

MHS will acquire materials with a documented association to Maine history. The standards for collection acquisitions are outlined in this policy in section VIII -- *Acquisitions*. Any acquisitions will be managed on a case by case basis by the Curator of the Museum and the Head of Library Services.

As stated above, the current plan focuses on the care and assessment of existing materials as a way to strengthen MHS collections.

## V. THE COLLECTIONS

The Collections of the Maine Historical Society are organized in two functional areas: the Library, and the Museum.

### A. Library Collections

#### 1. General Collections

Include, but are not limited to, commercially available trade publications such as books, newspapers, periodicals, pamphlets, maps, census data, brochures and ephemera in all format/media including microfilms, video tapes and CD ROM. Preference is given to acquisitions in the following areas:

- a. Works of non-fiction concerning Maine history, biography and genealogy
- b. Works that document and interpret Maine's regional history, particularly in connection with New England and eastern Canada
- c. Works that complement existing collection strengths or supplement existing subjects
- d. Reference works that assist in the research, documentation, and interpretation of all aspects of Collections
- e. Selective fiction relating to Maine

#### 2. Manuscripts and Special Collections

Include unique and rare items from the above categories as well as, but not limited to manuscripts, archives, photographic materials, prints, broadsides, scrapbooks, maps, architectural and engineering drawings, and paper ephemera relating to the history of Maine and its people.

### B. Museum Collections

#### 1. General Collections

Include, but are not limited to, fine and folk art, costumes and textiles, decorative arts, industrial, scientific, and engineering artifacts, militaria, personal artifacts, and archaeological and ethnographic objects relating to the history of Maine and its people.

#### 2. Wadsworth-Longfellow House

Consists of the grounds, the house and contents, including furniture, textiles, ceramics, household equipment, original art, decorative arts, prints, and books.

## VI. COLLECTIONS MANAGEMENT AND CARE

It is the responsibility of Maine Historical Society to protect, preserve and maintain the condition and integrity of the objects and materials in the collection, while assuring reasonable public access. MHS will manage and maintain its collections according to professional standards.

### A. Documentation

#### 1. Library

Library collections shall be recorded, classified, and cataloged in accordance with generally accepted library and archival practices, using contemporary technology.

#### 2. Museum Collections

Objects shall be recorded, classified, and cataloged in accordance with generally accepted museum practices, using contemporary technology.

#### 3. Duplicate Records

A duplicate record for each item in the collections shall be established and maintained. Disks containing library and museum cataloging information and copies of Certificates of Gift shall be stored off-site.

### B. Preservation

1. MHS recognizes the need for adequate storage for all collections, based upon approved professional standards regarding temperature, light, and humidity levels. Every effort will be made to ensure that the conditions of storage, use, and exhibition of artifacts will result in the longest functional life of the artifacts, consistent with the educational goals of MHS.

### C. Conservation

1. The Staff will develop and annually update a conservation plan for the collections and collection-related facilities of MHS, which will be presented to the Collections Committee.
2. The staff shall engage the services of qualified conservators when conservation of objects is required. These conservators should follow the American Institute of Conservation *Code of Ethics and Guidelines of Practice*. Conservation treatment shall be carefully documented, both photographically and in writing.

D. Risk Management

1. Priority shall be given to the safety of staff and patrons.
2. Protection against hazards.
  - a. All necessary precautions must be taken to protect the collections and buildings from fire, vandalism, theft, or damage by natural causes. The buildings shall be equipped with security and fire detection systems, smoke detection systems, emergency lights, and fire extinguishers.
  - b. All staff members shall be aware of the location and operation of extinguishers and be fully versed in emergency plans.
  - c. The buildings shall be maintained to prevent damage from natural causes. Museum collections will be kept in locked storage rooms, off limits to the public.
  - d. All MHS buildings shall be armed with motion detectors and alarms which are activated whenever the building is vacant.
3. Insurance
  - a. The Maine Historical Society shall carry fine arts insurance on its collections, providing appropriate coverage on site, off site, and in transit. The amount of liability coverage shall be reviewed annually upon policy renewal.

## VII. PURPOSE AND USE OF THE COLLECTIONS

- A. The collections of the Maine Historical Society are preserved and maintained by the Society to further its mission and goals and may be used in the following manner:
1. Exhibition
  2. Loans to other museums, educational or cultural institutions
  3. Study, research, or other scholarly purposes
  4. When appropriate, selected objects may be used for educational programs
  5. For commercial reproduction when that use will not damage the items
- B. The collections may not be used for any purpose that does not further the goals of MHS. Inappropriate uses include, but are not limited to:
1. Use of objects as decoration or as props at social and theatrical events that are sponsored by MHS or otherwise.
  2. Reproduction of objects in publications or productions by outside agencies when the goals of the publication conflict with the MHS mission and goals.
  3. When in question, appropriate or inappropriate use of the collections will be determined by the Executive Director, and if needed, the MHS Board of Trustees.
- C. Collection objects are held in public trust in perpetuity by MHS. To protect the relationship between MHS and the public, and to preserve the historical integrity of each object, the monetary value of the collections will not be listed on balance sheets or other financial reports designed to show those objects as financial assets or collateral resources of the organization.

## VIII. ACQUISITIONS

### A. General Statements

1. As defined in the Society's mission statement, MHS actively collects and preserves material that "promotes the understanding and enjoyment of Maine history."
2. The MHS seeks additions to its collections that will further the Society's mission.
3. Potential acquisitions will be accepted only if the material is relevant to the MHS mission and statement of purpose. The relevance of an article to the collection can be shown through its provenance, which defines its association to Maine's history.

### B. Criteria

1. The MHS will collect materials that document the state's heritage.
2. Materials may be collected that have documented associations to individuals, residences, businesses, and other organizations that are or have been active within the boundaries of the State of Maine.
3. Materials without documented associations to individuals, residences, businesses, and other organizations may be collected if they were made in Maine, and clearly marked as such.
4. Materials may be collected if they are representative or typical of materials that were made and/or used in Maine, if that association is documented through historical research or in scholarly publications, and if that documentation is available for the collection record.

### C. Physical Condition of Materials

If it is determined that a museum or library material is relevant to the collection, the material must then be evaluated based on the following physical considerations:

1. The Society must be able to provide adequate care for the material as determined by established, professional standards.
2. Care for the material must not compromise the Society's ability to care for other portions of collections.
3. The material must be of the highest possible quality in terms of stability and condition.

### D. Terms and Conditions

1. The owner of the materials offered to MHS must have clear and legal title to that material. Clear title must be transferred to MHS with the gift. Whenever possible, all copyrights, where they exist, will be transferred to MHS.
2. No materials will be knowingly or willfully accepted by MHS if the material was illegally imported, or illegally obtained in the United States, as determined by local, city, state, federal or other laws, regulations, treaties, or conventions.

3. No material will be knowingly or willingly accepted by MHS where there is evidence that its collection involved the illegal destruction of historic sites, buildings, structures, or artifacts.
4. MHS will not accept any material with the condition that it must be displayed in an exhibit.
5. Gifts to the Society will be made without encumbrance of any restrictions. Any proposed restrictions on donated articles must be approved by the Executive Director, the Collections Committee, and the Board of Trustees prior to acceptance.

E. Authority

1. The Executive Director will act as the representative of the Board of Trustees when approving acquisitions. In some instances, the Director may delay approval of an acquisition pending formal review and approval by the Collections Committee or the Board of Trustees.
2. Acquisitions are identified by the Curator of the Museum and the Head of Library Services. The Executive Director will sign the Certificate of Gift, thereby completing the acquisition.
  - a. The MHS Certificate of Gift is the legal article of conveyance.
3. The Collections Committee is responsible for review of acquisitions that require special consideration. Such considerations include:
  - a. Materials that may not clearly meet the collecting criteria
  - b. Materials that will require exceptional use of institutional resources
  - c. Materials which are to be accepted with restrictions or unusual donor conditions
4. MHS staff is responsible for processing all acquisitions for the collections, completing all administrative tasks relating to this process, and providing the Collections Committee with a report of all acquisitions.
5. The Collections Committee will keep the MHS Board of Trustees informed regarding matters relating to collections acquisitions.

## IX. ACQUISITION METHODS, FUNDING AND PROCEDURES

The collection objects may be acquired by purchase, donation, bequest, or transfer.

### A. Purchases

1. Purchases shall be made from current budget allocations, monetary gifts for such purposes, income from designated funds, or special allocations by the Board of Trustees from operating or unrestricted funds.
2. Approval Procedure:
  - a. On an annual basis, a budget for acquisitions is established in the operating budget for the Library and Collections Department. These funds are managed by the Curator of the Museum or Head of Library Services and used at their discretion for acquisitions to the collections.
  - b. Recommendations for purchases that require the use of restricted funds, and are under \$2,500 shall be approved by the Executive Director.
  - c. If the purchase price exceeds \$2,500, the recommendation shall be submitted to the Disbursements Committee for approval.
    - i. The Disbursements Committee consists of the Executive Director, the Head of Library Services, the Curator of the Museum, the Chair of the Collections Committee, and the Chair or a Co-Chair of the Friends of the Collections subcommittee.
    - ii. The Chair of the Collections Committee will report to the Collections Committee, the Executive Committee, and the Board of Trustees as needed.
  - d. If the purchase price exceeds \$20,000, the Disbursements Committee will submit their recommendation to the Executive Committee of the Board of Trustees for approval.
3. The Collections Committee shall assist the staff in identifying the source of funds for purchases that exceed available resources.

### B. Donations

Donations for the permanent collections will be accepted if they conform to the conditions outlined in Section VIII—*Acquisitions*. When appropriate, staff will discuss with donors the monetary resources necessary for processing, conserving, and maintaining their gifts.

1. A Certificate of Gift acknowledging transfer of title will be issued to the donor.
2. Prior to making the gift, the donor is legally responsible for obtaining an appraisal if it is desired for tax purposes. Trustees, staff members, or members of any MHS policymaking committee shall not appraise items offered to the Society as gifts or for purchase.

C. Bequests

While MHS encourages bequests, it also reserves the right to renounce its interest in property left to the Society under a testamentary instrument, by the laws of intestacy, contract or trust. Renunciation of interest will be done within nine (9) months after the official notification of the bequest.

D. Transfers

Items may be acquired by transfer to MHS from the collections of another institution.

E. Objects Found in the Collection

If no records can be found concerning the source of an item found in the collections, the Registrar will work to comply with the abandoned property laws of the State of Maine to seek to transfer the legal title of the material to MHS.

F. Objects Placed on Deposit in the Library

MHS does not accept materials without transfer of legal title. Under extraordinary circumstances and after careful consideration, materials may be placed on deposit in the Library. The terms and conditions of such a deposit will be determined by the Head of Library Services and approved by the Executive Director and Collections Committee.

G. Reports to the Collections Committee

Staff will provide quarterly reports on acquisitions to the Collections Committee.

## X. DEACCESSIONING AND OTHER DISPOSITIONS

### A. General Statements

1. The process of survey and review of the collections is an ongoing activity of MHS staff. Through this process, objects that are outside the scope of MHS collecting interest, and no longer appropriate for the collections will be identified as candidates for deaccessioning.
2. The Maine Historical Society Board of Trustees recognizes the process of removing artifacts and library materials from the collection is an irreversible action that can only be approved after careful deliberation. Realizing the inherent consequences of any deaccessioning, all concerned persons will attempt to identify any potential future uses for the artifacts in question.

### B. Legal Considerations

1. MHS will make every reasonable effort to ascertain that it has clear and free title to the item in question. In any case where restrictions or restrictive agreements might apply, the advice of independent legal counsel shall be sought.
2. No accessioned item will be deaccessioned for any reason if it has been in the collections less than two years.

### C. Criteria

Collection materials may be considered for deaccessioning for one or more of the following reasons:

1. The material was acquired contrary to MHS's collections policy.
2. The material is outside the scope of the collections as defined in the acquisitions criteria.
3. The material is a duplicate or redundant copy, and MHS has no further use for it.
4. The material lacks physical integrity and can not be reasonably conserved.
5. The material threatens the physical safety of the staff, visitors, facility or other collections and this condition can not be remedied.
6. A better example of the material has been acquired by MHS.
7. MHS can not properly care for the material.

### D. Procedure

1. Any staff member may propose items for deaccession to the Curator of the Museum or Head of Library Services at any time. The Curator of the Museum or Head of Library Services shall provide an opportunity for opposing opinions by any other staff members.

2. Routine library replacements may be made at the discretion of the Head of Library Services, except that deaccessioning of any rare, unusual items, or major library collections shall be reviewed by the Collections Committee and the Board of Trustees.
3. The Curator of the Museum or Head of Library Services will submit a written recommendation to the Collections Committee proposing that an item(s) be deaccessioned. If the Collections Committee rejects the recommendation, staff may re-submit the recommendation with additional information at a subsequent meeting. If the Collections Committee approves the recommendation, the proposal for deaccessioning is forwarded to the Board of Trustees for consideration.
4. If the Board approves the recommendation to deaccession an object, it is held for a six-month waiting period in the event that new information or changed circumstances call for reconsideration of the Board's action. After the six-month waiting period has passed, the affirmative decision by the Board of Trustees to deaccession materials from the collection becomes final.
5. Any rejected recommendation may be reconsidered by the Board at a subsequent meeting.
6. If appropriate, a reasonable effort shall be made to notify the original donor or immediate heirs of the decision to deaccession the item, including the reasons for removal.

E. Disposition

1. When deaccessioned materials are of historical value, MHS will attempt to place such materials in an institution where they will be accessible to the public.
2. All deaccessioned materials will remain in the public domain, be returned to the original donors, be sold at public auction, or be destroyed.
3. Any income from deaccessioned artifacts will be placed in a designated fund dedicated for acquisitions or conservation of MHS collections.
4. Proceeds from book sales will be placed in the Library account for acquisitions.
5. There shall be no direct sale or transfer of any collection materials to any personnel associated with MHS including staff, trustees, volunteers, Society members, or members of their immediate families.

F. Documentation

1. All records pertaining to the acquisition and cataloging of the item shall be marked DEACCESSIONED with the date of authorization.
2. Information regarding the final disposition of the item and the amount of any consideration received shall be included on the permanent records, which will then contain the entire history of the item while in the custody of MHS.

## XI. ACCESS TO COLLECTIONS

### A. General Statements

1. The Maine Historical Society is committed to providing public access to museum and library collections by supporting the study and enjoyment of historic materials through exhibitions, research activities, and public programs including Maine Memory Network.
2. Procedures and rules for public access are designed to support appropriate use of historical materials while ensuring the highest standards for care and preservation of the collections.
3. MHS staff manages procedures for public access. If at any time, in the judgment of staff, the safety of the collections is compromised by public use, staff may act to mitigate the situation. The circumstances of the incident must immediately be reported in writing to the Executive Director, who then will pursue appropriate actions.
4. All visitors, including researchers, trustees, family members, committee members, MHS members, personnel of other museums, vendors, tradespeople, and the general public must be accompanied by an authorized staff member while in storage or other non-public collection areas.
  - a. Authorized staff are recognized by the Curator of the Museum or Head of Library Services as staff with ongoing, job-related duties for collections care and management.
  - b. The Curator of the Museum or the Head of Library Services will provide orientation and training in collections care and handling for authorized staff, as needed.
  - c. A list of storage and non-public collection areas will be maintained by the Curator of the Museum and the Head of Library Services.
  - d. Any exceptions for building access are at the discretion of the Curator of the Museum or the Head of Library Services.
5. Any staff person working in a collection area after regular working hours must inform his or her supervisor, and the Curator of the Museum and/or the Head of Library Services, of their schedule and the reason for their visit.

### B. Library

1. Cataloging Standards and Public Hours
  - a. Catalogs are maintained to provide public access to library collections and are available through printed or electronic formats.
  - b. The catalog system is based on current professional standards (such as *Anglo-American Cataloging Rules*, 2<sup>nd</sup> ed. and *Library of Congress Subject Headings*).
  - c. Access to processed Library, Manuscripts and Special Collections is available during Reading Room hours of operation as outlined in the *Guide to Research at the Maine Historical Society* and other MHS publications.

2. Guidelines for Use of the Collections

- a. Library staff will prepare and revise as needed *Guidelines for Use of the Collections*.
- b. The Collections shall be used by researchers in accordance with the published *Guidelines for the Use of the Collections*, which are available in the Reading Room and which reflect professional standards for the responsible use of rare and archival materials.
- c. Researchers are required to observe the *Guidelines for Use of the Collections*. If in the opinion of the staff any public behavior is incompatible with the responsible use of materials, access to the collection will be withdrawn and the user will be asked to leave.
- d. Generally, use of processed materials does not require advance appointment. Certain items may not be available at all times if they require special handling, have donor restrictions, or are stored off-site.
- e. Members and students are not charged for use of library collections. Non-members will be charged a daily-use fee.
- f. First-time researchers are given courtesy access to the library, and must complete a registration form at the reference desk before using library collections.
- g. All researchers must sign-in each day.

3. Reference Services

- a. Ready-reference or easily answered questions will be undertaken for patrons (including mail, e-mail, and telephone requests) at no cost as staffing time permits. Facsimile and e-mail requests will be treated as regular mail.
- b. Researchers unable to visit the Reading Room and interested in research services, may call, e-mail, or write to learn about access to collection information by engaging a professional researcher or employing MHS' fee-based researcher service.

C. Museum Collection

1. Access to Collection Objects and Tours of Collection Areas

- a. Public access to the museum collection is provided through exhibition, tours, and educational programs.
- b. Staff and public access to museum objects not on display and in storage may be obtained by scheduling an appointment with the Curator of the Museum at least 24 hours in advance.
- c. Access to museum collections in storage will be provided at the discretion of the Curator of the Museum.
- d. At all times, visitors in collection areas will be accompanied by staff. Handling of collection objects must be supervised by collections department staff.
- e. While examining collections objects, researchers must observe regulations for care and handling as determined appropriate by the Curator of the Museum (e.g. wearing white cotton gloves, using pencils, object handling, etc.)

2. Reference Questions

- a. Collections Department staff will respond to reasonable written inquiries about the collection.
- b. With permission of the Executive Director, the Curator of the Museum may suggest a fee for public inquiry requiring unusual amounts of curatorial time. A user fee will be charged as appropriate.

D. Wadsworth Longfellow House

1. The Wadsworth Longfellow House is available for public visitors on guided tours during the "open" season.
2. In some circumstances, the House may be open for special tours or events.
  - a. Any special event must be a benefit to and support the purposes of MHS.
  - b. In consultation with the Curator of the Museum, the Executive Director must approve any use of the House for a special event.
3. In all cases, visitors are not allowed in the House without authorized staff.
4. Tour size is limited to a maximum of twelve visitors for each group.
5. While on tours, visitors must follow guidelines or other procedures established by the Curator of the Museum and designed to make the visit enjoyable while protecting the collection. Guides and docents are responsible for communicating these guidelines to all visitors and making sure they are understood.
  - a. Visitors may not touch collections objects.
  - b. Visitors must keep behind barriers, walk on mats and runners, and/or wear shoe covers.
  - c. Visitors must not carry coats, bags, or other belongings while on tours of the House.
  - d. No food or beverages are allowed in the house under any circumstances.
  - e. No photography is allowed while on tour.
  - f. Visitors who do not follow guidelines will be escorted from the tour.

E. Photography

1. Photography for research purposes is allowed of collection materials with prior approval and at the discretion of the Curator of the Museum and/or the Head of Library Services.
2. Filming, video, photo reproduction and/or publication of items in the Collections is governed by standards outlined in the MHS *Request for Reproduction and Permission to Publish* forms.
3. Film crews, photographers, and other media coverage of the Wadsworth Longfellow house or other collections must be scheduled in advance with the Curator of the Museum or Head of Library Services. Under no circumstances will access or use be permitted that jeopardizes the care or security of the collection. Any film crew must be supervised by authorized staff.

## XII. OUTGOING LOANS

Outgoing loans are an important way of broadening public awareness of Maine Historical Society collections. Loan policies are designed to ensure the safety of any items loaned from the collections.

### A. Criteria

1. Items from the Library and Museum collections will be loaned to museums, historical societies and other conserving institutions or organizations for the following reasons:
  - a. Exhibition
  - b. Research, examination or identification
  - c. Educational programs sponsored by MHS
2. Exceptions may be considered by the Collections Committee on recommendation of the Curator of the Museum and/or the Head of Library Services.

### B. Authority

1. The MHS staff will act as representatives of the Board of Trustees in all matters relating to loan requests.
2. The Curator of the Museum will oversee requests for museum materials, and the Head of Library Services will oversee requests for library materials. The Registrar will coordinate necessary activities and maintain files for the loan.
3. Loan requests and renewals will be evaluated on an individual basis and may be approved or declined based on the following considerations:
  - a. Length of loan period
  - b. Exhibition facilities and environmental conditions
  - c. Physical condition of the object(s) requested
  - d. Prior commitment to use the object at MHS or elsewhere
  - e. Other considerations as the situation warrants
4. In instances of problematic or extraordinary loans, the loan request will be referred to the Executive Director, the Collections Committee, and, if needed, the Board of Trustees for final decision.
5. Loan requests and renewals will be processed, documented, and monitored by the Registrar.

C. Terms and Conditions

1. Loan requests must be received in writing three (3) months prior to the beginning date of the loan.
2. A report (the American Association of Museums' *Standard Facilities Report* or equivalent) detailing the Borrower's exhibition facilities and methods of transportation, handling, exhibition plan, and temporary storage conditions must be submitted to MHS.
3. Materials borrowed shall be given special care at all times to ensure against loss, damage or deterioration. The Borrower must agree to meet special requirements for installation and handling as noted on the agreement form.
4. Upon receipt and prior to return of the materials, the Borrower must make a written record of each item's condition. If damage or loss is discovered, MHS is to be notified immediately, and the Borrower is to forward a full written report, including photographs of the damage.
5. No cleaning or repair work may be done on any item without the prior written permission of MHS. The Borrower may not subject loaned material to technical examination of *any* type without prior written permission of MHS.
6. The Borrower will be responsible for monitoring the condition of each item while it is in its possession.
7. Each item will be labeled and credited "Collections of the Maine Historical Society."
8. Receipt of a loan does not carry with it any rights to reproduce, distribute or publish images of the item(s). Maine Historical Society must approve all photography, scanning or reproduction. Copies of any slides, negatives, transparencies, digital files or the masters for any other type of duplication must be sent to Maine Historical Society. Permission to publish, distribute, display on the Internet or make copies for sale must be requested in writing. Maine Historical Society does not grant rights to exclusive use and reserves the right to publish copies of materials from its collections or authorize others to do so.
9. Unless otherwise noted, all costs of packing, transportation, customs, insurance and other loan-related costs will be borne by the Borrower.
10. The Borrower will return all materials to MHS packed in the same packing and in the same manner as received, unless authorized by MHS to do otherwise.
11. The placement of full insurance coverage, naming the Maine Historical Society as the insured against all and any loss, including theft, on an item, is the responsibility of the Borrower. The insurance shall cover the item while in transit and during its exhibition or use. Appraisals establishing current market value of items lent by the Society shall be at the expense of the Borrower. In the event of any loss or damage whatsoever to any borrowed item while in transit or while on loan, the Borrower shall be held financially liable for all restoration costs not paid by the insurance premium.
12. The Maine Historical Society reserves the right to recall items at any time. Unless the recall is made because of the Borrower's failure to abide by the conditions of the loan agreement, the Society will make every effort to make an appropriate substitution.

D. Renewals

1. MHS will not lend artifacts on a permanent or indefinite basis. Any loan initiated with the intent to borrow an artifact for a period longer than one year is considered a long-term loan. Long-term loans must be renewed on an annual basis.
2. Loan extensions may be granted, if appropriate, upon the signing of a Loan Renewal form indicating that the terms and conditions in the original agreement are still binding. The condition of the object must be taken into account by MHS staff when considering such requests.

E. Interlibrary Loans

1. The Library is a non-circulating research facility and does not participate in the interlibrary loan program. Special circumstances may be considered by the Head of Library Services, who may consult with the Collections Committee if needed.

### XIII. INCOMING LOANS

#### A. Criteria

Artifacts from other institutions will be borrowed for the following reasons:

1. Temporary exhibition
2. Long-term exhibition
3. Research, examination, or identification

#### B. Authority

1. MHS staff will act as the representatives of the Board of Trustees in all matters relating to loan requests.
2. The project director or exhibit curator will oversee requests for in-coming loans, and the Registrar will coordinate necessary activities and maintain files for the loan.
3. When a problematic or extraordinary loan requires additional review, the Executive Director, Collections Committee, and the Board of Trustees may be asked to evaluate the prospective loan.

#### C. Duration

1. MHS does not accept artifacts on "permanent" or indefinite-term loans.
  - a. In the past, MHS did accept artifacts on "permanent" or indefinite-term loan. If such loans are discovered in the collection, MHS staff must attempt to contact the Lender/s and resolve the status of the artifact in one of three (3) ways:
    - i. Convert the loan into a gift, if acceptable to the current owner and in line with MHS's acquisition criteria
    - ii. Negotiate a new loan agreement with a specific ending date
    - iii. Return the artifact(s) to the Lender
  - b. If there is no address on record for the owner, the staff will document their efforts to contact the owner of record. These documents (correspondence, telephone records) will be placed in the loan file.
  - c. In the case of abandoned property, the Registrar will work to comply with the abandoned property laws of the State of Maine to seek the transfer of legal title of the loaned material to MHS.

#### D. Long-term Loans

1. Any loan initiated with the intent to borrow an artifact for a period longer than one year is considered a long-term loan.
2. Long-term loans will be renewed on an annual basis.
3. MHS will seek to fill long-term exhibition needs from the permanent collection, or through acquisitions. MHS will borrow artifacts for long-term exhibits only if the artifacts are deemed crucial to the exhibit, as determined by the MHS staff with approval of the Executive Director.

E. Short-term loans

1. Short-term loans are not to exceed a period of one year.

F. Terms and Conditions

1. The Lender must clearly establish in writing any special conditions for each artifact to be loaned to MHS. MHS will agree to meet the required conditions, or inform the potential Lender if those conditions cannot be met.
2. MHS will exercise the same care and responsibility in respect to the loaned items as it does in the safekeeping of comparable collections of its own.
3. MHS will only accept artifacts on loan that are in such condition as to withstand packing, transportation, and handling.
4. Insurance
  - a. MHS will insure borrowed work wall-to-wall under its fine arts policy for the amount specified by the Lender against all risks of physical loss or damage from any external cause while in transit and on location during the period of this loan; provided, however, that if the works shall have been industrially fabricated and can be replaced to the artist's specifications, the amount of such insurance shall be limited to the cost of such replacement.
  - b. If no insurance amount is specified by the Lender, MHS will insure the work at its own estimated evaluation.
  - c. MHS's Fine Arts policy contains the usual exclusions for loss or damage. The Lender will agree that in the event of loss or damage, recovery shall be limited to such amount, if any, as may be paid by the insurer thereby releasing MHS and Trustees, officers, agents, and employees of the Society from liability for any and all claims arising out of such loss or damage.
  - d. If the Lender chooses to maintain his/her own insurance, MHS must be supplied with a Certificate of Insurance from the Lender's insurance company naming MHS as an "additional insured" or waiving subrogation against the Society. Failure to supply MHS with such a certificate shall constitute a release of MHS from any liability in connection with the artifact.
  - f. MHS cannot accept responsibility for any error or deficiency in information furnished by the Lender or any lapses in coverage.
5. Photography
  - a. Unless permission is refused in writing, it is understood that all items included in a Loan Agreement may be photographed and reproduced in an exhibition catalog or for publicity purposes connected with the Museum.

6. Change in Address or Ownership

- a. MHS must be contacted if there is a change in the name or address of the Lender.
- b. If there is a change of ownership of an artifact, it is the responsibility of the Lender to notify MHS promptly, in writing.

G. Interlibrary Loans

1. The library is a non-circulating research library. It may participate in incoming, inter-library loans in accordance with accepted library standards.