



MAINE  
HISTORICAL  
SOCIETY

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MAINE HISTORICAL SOCIETY

COLLECTIONS MANAGEMENT  
POLICY

Adopted by the Board of Trustees November 12, 2014

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## I. INTRODUCTION

### A. Mission

The Maine Historical Society (MHS) preserves the heritage and history of Maine: the stories of Maine people, the traditions of Maine communities, and the record of Maine's place in a changing world. Because an understanding of the past is vital to a healthy and progressive society, we collect, care for, and exhibit historical treasures; facilitate research into family, local, state, and national history; provide education programs that make history meaningful, accessible and enjoyable; and empower others to preserve and interpret the history of their communities and our state.

### B. Vision Statement

See current MHS vision statement.

### C. History

Maine Historical Society is the third oldest state historical society in the United States. It was founded in 1822, just after Maine separated from Massachusetts, and it has remained in continuous operation ever since.

MHS is currently organized into four major areas: The MHS Research Library, the Wadsworth-Longfellow House, the MHS Museum, and digital educational services, including the Maine Memory Network. A Board of Trustees exercises full authority over all aspects of the business and affairs of the Society, and, along with standing committees and subcommittees, advise and support the Society staff.

The John Marshall and Alida Carroll Brown Research Library documents all aspects of Maine's social, economic, political, and cultural history, and is widely held to be the most comprehensive resource for studying Maine's past. The collections cover the entire state with particular strength for southern Maine. Of particular note are the personal papers of Maine's civic and business leaders, early proprietary, town and church records, shipping and maritime records, account books and business records, genealogical research collections, cartographic and land surveys, architectural and engineering drawings, photographs, prints, and broadsides. The Brown Library is open five days per week and serves over 16,000 researchers each year on-site and through online, phone, and mail research requests.

Open to the public since 1901, the Wadsworth-Longfellow House Museum, poet Henry Wadsworth Longfellow's boyhood home, is one of the oldest house museums in the country. Guided tours of the House are offered April through December.

Open year-round, the MHS Museum offers changing interpretive exhibitions each year featuring selections from the Library collections and the over 18,000 artifacts documenting Maine's material culture in the Museum collections.

The Maine Memory Network provides online access to thousands of historical items belonging to over 260 organizations from across Maine which can be searched, browsed, or arranged into exhibits.

D. Authority for the Collections

1. The Collections are owned by MHS and held in trust by the Board of Trustees. Collection items are administered and cared for by professional staff in accordance with the policies and guidelines outlined in this manual, and the best practices in the library and museum fields.
2. The MHS Board of Trustees is responsible for the care and preservation of all collections. On an annual basis, the Board, through its Finance & Investment Committee, establishes a budget to support care and development of the MHS collections.
3. The Executive Director provides leadership and administrative oversight for library and museum operations, manages the department heads, and assists in development of project plans, reports, grants, and other documents as required by the Board of Trustees or other agencies.
4. MHS collections staff are responsible for day to day administration of collection-related activities including managing acquisitions, deaccessions, and library removals; housing, storage, and conservation of materials; providing public access to collections; and exhibition planning and development. Collections staff provides written and/or oral reports to the Collection Committee quarterly, and are organized by department but accountable to the Executive Director.
5. The collections staff meet regularly to plan and coordinate key institution-wide activities, including collections management, development, exhibition, and interpretation.
6. As outlined in this document, the Collections Committee should be knowledgeable of new acquisitions; review deaccession proposals and present recommendations to the Board of Trustees; review, approve, and recommend collection-related policies; assist in the development of plans and projects relating to collections; and advocate for the MHS collections to the Board of Trustees.

E. Statement of Purpose

The purpose of this *Collections Management Policy* is to establish standards and guidelines for the acquisition, exhibition, preservation, and management of MHS collections. The policy identifies areas of collecting interests, as well as the duties and responsibilities of the collections staff, and the MHS governing bodies.

F. Commitment to Collections Stewardship

Maine Historical Society's stewardship of the collections in its care entails the highest trust and the presumption of permanence, documentation, and accessibility. The collections are the enduring assets that distinguish MHS from other cultural and educational institutions. The collections hold the heritage of many Maine communities in perpetual trust, and connect MHS to the history and culture of the people of Maine and their place in the world at large.

G. Process of Establishing Policy

1. This *Collections Management Policy* is reviewed annually with input from collections staff, the Executive Director, and the Collections Committee. Any changes are 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 policy is to be considered a working document. Any errors, omissions, or other necessary changes will be identified and corrected by collections staff, presented to the Collections Committee, and approved by the Board of Trustees in a timely manner. A simple majority of the total membership of Board of Trustees is required for approval of changes to this policy.

## II. COMPOSITION OF THE COLLECTIONS COMMITTEE

A. The MHS Collections Committee is a standing 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 Chair of the Board (ex-officio).
2. The Committee Chair is appointed by the Board of Trustees and, under the MHS By-laws, must be a Trustee.
3. Other Trustees appointed by the Board of Trustees.
4. Non-trustee community members may be appointed by the Board of Trustees after consultation with the Committee Chair. Non-trustee members will have a background or expertise in a field relevant to the management or development of the MHS collections, and their term will be renewed by the Chair on an annual basis.
5. The Chair of the Friends of the Collections Subcommittee, when active.
6. A member (non-staff) of the Library Committee and of the Museum Committee.
7. Staff members on the Committee include the Collections Manager/Registrar as staff liaison, the Chief Curator, the Director of Library Services, the Executive Director (ex-officio), and other collections staff as appointed by their Department Head or the Executive Director.

### III. ROLE OF THE COLLECTIONS COMMITTEE

- A. The Collections Committee shall be familiar with this *Collections Management Policy*, and oversee matters relating to the development, care, use, and management of MHS collections. It shall coordinate with other committees, as appropriate, in MHS endeavors.

The Collections Committee shall:

1. Meet at least four times during the year, or as needed, to conduct its business.
2. Every five years, at a minimum, update the Maine Historical Society *Collections Management Policy*. The updated policy must be presented to the Board of Trustees for approval.
3. Review the regular reports of the collections staff, which will include lists and information on new acquisitions, incoming and outgoing loans, and any other collection-related plans or activities deemed significant by collections staff.
4. Review all deaccessions, and any acquisitions as needed or required by policy.
5. On a regular basis, and in collaboration with collections staff:
  - a. Review a written statement of collecting interests and/or the MHS *Collecting Plan*.
  - b. Review the MHS *Conservation Plan*.
  - c. Review plans of work in advance of the budgeting process.
  - d. Review staff procedures for access and use of the collections.
  - e. Review the MHS *Emergency Response Plan*.
6. Work in support of collections 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).
7. Be familiar with the collections and collection-related issues.
8. Establish clear fund definitions, and regularly verify any funds dedicated for acquisitions and/or collections care.
9. Establish subcommittees and receive regular reports as appropriate.
10. Work collaboratively with the Friends of the Collections Subcommittee, when active, to develop, promote, and enhance the collections and collecting resources of the MHS.
11. Prepare and circulate detailed minutes of each meeting to members of the Committee.

#### IV. Scope of Collections

##### A. Overview

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 Statement of 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 IX-- Acquisitions. Acquisitions will be considered on a case by case basis by the Chief Curator and the Director of Library Services.



## V. THE COLLECTIONS

The Collections of the Maine Historical Society are organized in two functional areas: the Library and the Museum (including the Wadsworth-Longfellow House).

### A. Library Collections

#### 1. General Permanent Collections

Include, but are not limited to, commercially available trade publications such as books, periodicals, pamphlets, and media including microfilm and audio visual materials. 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, including collections management and public services.
- e. Selective fiction by Maine authors or in a Maine setting.

#### 2. Manuscripts and Special Permanent Collections

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

#### 3. Institutional Archive

Collectively known as Coll. 110, the archive includes the institutional, administrative, historical, ephemeral, and financial records of the Maine Historical Society from its founding to the present, as well as records for absorbed collections such as the Maine Genealogical Society and the Loyal Legion. Specifically relevant to MHS collections are the accession records for both the library and museum. While administered by the library and the Director of Library Services, Coll. 110 includes objects such as furniture and signage managed by the museum department.

#### 4. Research Support Collections

Include but are not limited to modern ephemera, photocopies of original materials such as newspaper clippings, photographs, and articles, blog posts, etc. printed off the internet. By definition, Research Support Collection materials are not unique, and can be found elsewhere. They are not accessioned, and can be weeded, discarded or otherwise disposed of by the Director of Library Services.

5. Deposit Collections

Deposit collections are library manuscript collections, wherein the owner has retained legal title to the collection. MHS does not have ownership of these collections, but they are stored in library collections storage, and in most cases are accessible to researchers. Unless there is an extremely compelling reason to do so, deposit collections are no longer accepted by MHS. Deposit status is considered a restriction, and therefore must be approved by the Director of Library Services, the Executive Director, the Collections Committee, and the Board of Trustees. New material will not be added to existing deposit collections without first attempting to convert the deposit into a gift.

An up-to-date “Document of Deposit” shall be maintained for each deposit collection in the possession of MHS.

B. Museum Collections

1. General Permanent Collections

Includes, but not limited to, all accessioned 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 all accessioned contents, including furniture, textiles, ceramics, household equipment, original art, decorative arts, prints, and books, all which are part of the permanent collections.

3. Exhibit Props

Includes, but not limited to, imitation floral material, greenery, garland, Christmas trees, imitation food, vases, and other containers used to display floral material. Props will be labeled “Prop” whenever possible, and are not considered part of the Permanent Collection, and, as such, it can be updated, exchanged, discarded, and otherwise manipulated as collections staff sees fit. The exhibit prop collection is not accessioned and not subject to the policies set forth in this document.

C. Found in Collection

If no records can be found concerning the source of an item found in the collection (FIC), the Collections Manager/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. These materials will be assigned a special temporary “.001” accession number, indicating their FIC status (2014.001.001, for example). If at a later date the source is identified, the number may be changed to a permanent accession number. These items are part of the permanent collections.

D. Teaching Collection

Items (either originals or reproductions) that are suitable and appropriate for use by education and interpretive staff in any type of educational program. These items may be handled by students and visitors, and are managed by the Education and Interpretation

Department. They will be labeled “Teaching Collection” whenever possible, and are not considered part of the Permanent Collection, and, as such, it can be updated, exchanged, discarded, and otherwise manipulated as education staff sees fit. The Teaching Collection is not accessioned and not subject to the policies set forth in this document.

## VI. DOCUMENTATION, CONSERVATION, AND CARE

Maine Historical Society's obligation to its collections is paramount, and is a continual responsibility accepted by MHS on behalf of the general public. MHS shall carry out the legal, ethical, and professional responsibilities required to provide necessary care for the all the collections acquired or borrowed by MHS. MHS will 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 widely accepted professional standards, and shall provide ongoing information and training opportunities to all collections staff on proper care of collections.

### A. Documentation

Accurate, complete, and timely documentation increases research opportunities, and improves access and collections care. Documentation maintains physical and intellectual control over collections, and provides the identification, condition, history, use, and value of the items in the permanent collections. Collections records must, therefore, be of the highest order of accuracy and completeness.

#### 1. Library

Library collections shall be accessioned, recorded, classified, and digitally cataloged in accordance with library and archival practices, using contemporary technology (Minerva or equivalent). Paper "Source Files" shall be created and maintained for all Manuscript Special Collections. See Section IX: Acquisitions.

#### 2. Museum Collections

Objects shall be accessioned, recorded, classified, and digitally cataloged in accordance with museum practices, using contemporary technology (PastPerfect or equivalent). Paper "Object Files" will be created and maintained for all Museum Collections. See Section IX: Acquisitions.

#### 3. Acquisition Paperwork

Original, signed Certificates of Gift, Temporary Custody Receipts, deposit agreements, and related acquisition paperwork will be arranged numerically and bound by year. Accession records are maintained in the collections management database (currently PastPerfect). A printed list of accessions will be bound by year.

### B. Preservation

Preservation planning is an ongoing process for Maine Historical Society collections staff. The *MHS Preservation Plan*, which includes a prioritized list of actions necessary to improve the condition of collections in all MHS buildings, was approved by the Board of Trustees in 2011, and complements this *Collections Management Policy*.

In general, MHS recognizes the need for appropriate storage for all permanent collections, based upon accepted professional standards regarding temperature, light, humidity levels, and integrated pest management. 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.

Routine preservation efforts are the responsibility of the collections staff, including but not limited to surface cleaning, re-housing, and quarantine, when necessary.

C. Conservation

Although preventative care is the preferred method of care for the permanent collections, there are times when remedial conservation treatment is necessary. The staff shall engage the services of qualified conservation professionals when conservation of objects is required. These conservators must follow the Code of Ethics and Guidelines for Practice of the American Institute for Conservation of Historic & Artistic Works (AIC), which sets forth the principles that guide conservation professionals and others who are involved in the care of cultural property. Conservation treatment will be carefully documented, both photographically and in writing, and a copy of this documentation will be saved in the object or source file of the item conserved.

D. Risk Management

Prudent collections management requires identification and elimination of risks to the permanent collections. Incoming and outgoing registrarial processes are critical to controlling risks. They include inventory, condition reporting, and issuing receipts for all collections upon entry and exit from MHS property.

1. Priority shall be given to the safety of staff and all visitors.
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. At minimum, 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 and Library special collections not in use 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. MHS maintains a blanket fine arts insurance policy. The policy is procured and administered by the Director of Finance, and is reviewed annually in consultation with the Collections Manager/Registrar. The policy covers items owned by MHS, as well as those on loan or in our temporary custody, a) on MHS property, b) at any other location worldwide, and c) in transit worldwide. Limits of 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. Outgoing loans to other museums, educational, or cultural institutions.
  3. Study, research, or other scholarly purposes.
  4. When appropriate, and with the approval and support of collections staff, materials may be used for educational programs and other outreach.
  5. Reproduction, when that use will not damage the material.
- B. The collections are used to further the goals of MHS. When in question, appropriate or inappropriate use of the collections will be determined by the Executive Director in consultation with the appropriate collections staff, and, if needed, the MHS Board of Trustees. Inappropriate uses include, but are not limited to:
1. Use of collections as decoration or as props at social and theatrical events that are sponsored by MHS, or by others.
  2. Reproduction in publications or productions by outside agencies when the goals of the publication conflict with the MHS mission and goals.
- 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. ACCESS TO COLLECTIONS

The collections of the Maine Historical Society exist for the benefit of present and future generations. To safeguard their physical security, collections staff may limit the size of groups in storage, and other collections areas. Collections areas will be monitored by professional staff at all times when the public is present.

### 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, public programs, and online resources including Minerva, PastPerfect Online, and 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 collections 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, contractors and other maintenance personnel, and the general public must be accompanied by an authorized collections staff member while in collections storage or other non-public collection areas.
  - a. Authorized staff are recognized by the Chief Curator or Director of Library Services as staff with ongoing, job-related duties for collections care and management.
  - b. The Chief Curator, the Director of Library Services, and the Collections Manager/Registrar 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 Chief Curator and the Director of Library Services.
  - d. Any exceptions for building access are at the discretion of the Chief Curator or the Director of Library Services.
5. Any staff person working in a collection area after regular working hours must inform his or her supervisor, and the Chief Curator and/or the Director of Library Services, of their schedule and the reason for their presence.

### B. Library

1. Cataloging Standards and Public Hours
  - a. Catalogs are maintained to provide public access to library collections and are available on electronic formats, primarily Minerva.

- b. The catalog system is based on current professional standards (such as RDA – Resource Description and Access, Library of Congress Authorities, and MARC standards).
- c. Access to processed Library, Manuscripts, and Special Collections is available during Reading Room hours of operation as outlined in the *Collections Use Guidelines* and other MHS publications.

## 2. Guidelines for Use of the Collections

- a. Library staff will prepare (and revise as needed) the document *Collections Use Guidelines*.
- b. The collections shall be used by researchers in accordance with the *Collections Use Guidelines*, which is available on the MHS website and in the Reading Room, which reflects professional standards for the responsible use of rare and archival materials.
- c. Researchers are required to observe the *Collections Use Guidelines*. 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. Some materials may require an appointment to view, such as oversized items or those stored off-site. Advance notice is required, as outlined in the *Collections Use Guidelines* posted online and available within the library. Off-site materials are indicated as such in the library online catalog, which is publically accessible.
- 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 must complete a registration form at the reference desk before using library collections.
- g. All researchers (member and non-member alike) must sign in each day, and register with library staff.

## 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 staff time permits. Research which requires significant staff time requires the use of fee-based research services.
- 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 employing MHS' fee-based researcher service. Fee-based services are outlined on the Society's website.

## C. Museum Collection

### 1. Access to Museum Collection 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 in storage may be obtained by scheduling an appointment with the Chief Curator or the Collections Manager/Registrar at least two business days in advance. Access to museum objects is subject to their availability.
- c. Access to museum collections storage will be provided at the discretion of the Chief Curator or the Collections Manager/Registrar.
- d. At all times, visitors in collection areas will be accompanied by collections staff. Handling of collection objects must be supervised by collections staff.
- e. While examining museum objects, visitors must observe regulations for care and handling as determined appropriate by the Chief Curator and the Collections Manager/Registrar (e.g. wearing gloves when asked, using pencils, limits on flash photography, etc.)

2. Reference Questions

- a. Museum Department staff will respond to reasonable written inquiries about the collection.
- b. With permission of the Executive Director, the Chief Curator may suggest a fee for public inquiry requiring unusual amounts of staff 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 when it is open to the public during a regular season, and at other times determined by MHS staff (i.e., during the winter holiday season).
- 2. In some circumstances, the House may be open for special tours, open houses, or other events.
  - a. Any special event must support the purposes and mission of MHS.
  - b. In consultation with the Chief Curator and the Collections Manager/Registrar, 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. Guided tour size is limited to a maximum of twelve visitors in each group. A maximum of two tour groups may circulate in the House at the same time.
- 5. While on tours, visitors must follow guidelines or other procedures established by the Museum and Education Departments, and are 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, and walk on mats and runners.
  - c. Visitors must not carry oversized bags or other large belongings while on tours.

- 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 non-publication, reference purposes, is allowed of collection materials with prior approval and at the discretion of the Chief Curator, the Director of Library Services, and/or the Collections Manager/Registrar.
  - a. Use of a non-flash digital camera in the library is a member benefit, subject to staff approval and requires submission of the "Permissions to Photograph" form.
  - b. Museum collections department staff must approve all museum photography, and a staff member must be present at the time photography occurs. The form "Permission to Photograph Museum Collection Objects" must be completed by the individual requesting the permission.
2. Any kind of filming, video, photo reproduction and/or publication of items in the collections for commercial use is governed by the standards outlined in the MHS "Permission Request For Publication Or Display" form. These requests are facilitated by the MHS Image Services Coordinator.
3. Film crews, photographers, and other media coverage of the Wadsworth-Longfellow house or other collections must be scheduled in advance with the Chief Curator, Director of Library Services, or the Collection Manager/Registrar. 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.

## IX. ACQUISITIONS

### A. General Statements

1. Collection development is fundamental to MHS's long-term success. As stated in the Society's mission statement, we "collect, care for, and exhibit historical treasures...that make history meaningful, accessible, and enjoyable."
2. Potential acquisitions will be accepted only if the material is relevant to the MHS mission and the Scope of Collections (Section IV). Acquisitions must be useful to the purpose and collecting goals of MHS. The relevance of an article to the collection can be shown through its provenance, which defines its association to Maine's history, or by the nature of its content.
3. The Chief Curator and the Director of Library Services are responsible for providing a written justification or "Acquisition Prospectus" to support the case for a new acquisition.
4. Criteria and considerations that pertain to offers of whole collections or archives include the Society's ability to fulfill the responsibilities associated with the care, preservation, and utilization of the number of objects proposed for acquisition. MHS retains the right under the terms of purchase, gift, or bequest to accession the collection either in whole or in part.

### B. Criteria

1. MHS will collect materials that document Maine's heritage, and that have documented associations or content that relates to or describes individuals, businesses, or other organizations, both private and public, that are or have been active within the boundaries of the State of Maine.
2. Materials without documented associations or content related to individuals, businesses, or organizations may be collected if they were made in Maine, and clearly marked as such.
3. 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 research or in scholarly publications, and if that documentation is available for the collection record.
4. MHS may collect reference materials that support existing collections.
5. The authenticity and provenance must be satisfactory to the Chief Curator and/or Director of Library Services.

### 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 its nature and physical condition.

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. Title must be transferred to MHS with the gift. MHS seeks to secure copyright on all acquisitions, and, 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 or archeological sites, buildings, structures, or artifacts.
4. MHS will only accept acquisitions of unrestricted gifts wherein free and legal title shall be obtained without restriction as to use, exhibition, or future disposition. Any proposed restrictions must be approved by the Executive Director, the Collections Committee, and the Board of Trustees prior to acceptance of the gift by MHS.

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 Chief Curator and the Director of Library Services. The Executive Director and the Donor will each 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 constrained by restrictions or unusual donor conditions.
4. MHS collections staff is responsible for processing all acquisitions for the collections, completing all administrative tasks relating to this process, and providing the Collections Committee with regular reports of all acquisitions.

5. The Collections Committee will keep the MHS Board of Trustees informed regarding matters relating to collections acquisitions.

## X. ACQUISITION METHODS, FUNDING AND PROCEDURES

Collection materials 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 Museum Departments. These funds are managed by the Chief Curator or Director 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 \$5,000 shall be approved by the Executive Director.
  - c. If the purchase price exceeds \$5,000, the recommendation shall be submitted to the Disbursements Committee for approval.
    - i. The Disbursements Committee consists of the Executive Director, the Director of Library Services, the Chief Curator, the Chair of the Collections Committee, and the Chair or a Co-Chair of the Friends of the Collections subcommittee, when active.
    - ii. The Chair of the Collections Committee will update the Collections Committee and the Board of Trustees on the work of the Disbursements Committee 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 collections will be accepted if they conform to the conditions outlined in Section IX—*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 and copyright, if copyright is available, will be issued to the donor.
2. Prior to making the gift, the donor will be responsible for obtaining an appraisal if it is desired for tax purposes. Trustees, staff members, or members of any MHS committee shall not appraise items offered to the Society as gifts or for purchase. MHS will not make, arrange, or pay for appraisals of donations made to the Society, although collections staff may make the donated material available for examination to an appraiser

hired by the donor, if the donation is in the custody of MHS. Staff may provide a list of appraisers, without prejudice or endorsement, to those who are seeking one.

C. Bequests

MHS encourages all bequests, but is under no obligation to accession property bequeathed to the Society. Accessions will be determined based on the general collecting policies of the Society. Bequests that are not accessioned may be 1) renounced or 2) accepted and disposed of by the Society at its sole discretion.

D. Transfers

Items may be acquired by transfer to MHS from the collections of another museum, library, or other type of collecting institution.

E. Materials Found in the Collection

If no records can be found concerning the source of an item found in the collections (FIC), the Collections Manager/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. These materials will be assigned a special temporary “.001” accession number, indicating their FIC status (2014.001.001, for example). If at a later date the source is identified, the number may be changed to a permanent accession number. These items are part of the permanent collections.

F. Material 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 Director of Library Services and approved by the Executive Director, the Collections Committee, and the Board of Trustees.

G. Reports to the Collections Committee

Collections staff will provide regular reports on acquisitions and related matters to the Collections Committee.

## XI. DEACCESSIONING AND OTHER DISPOSITIONS

Deaccessioning is the formal process by which items are permanently removed from the collections. It is the policy of the Maine Historical Society to add items to the collections with care so that deaccessioning will seldom be necessary. Careful and thoughtful deaccessioning is a necessary part of professional collections stewardship.

### A. General Statements

1. The process of survey and review of the collections is an ongoing activity of MHS collections staff. Through this process, material that is outside the scope of MHS's mission and/or collecting interest or otherwise no longer appropriate for the collections will be proposed as candidates for deaccessioning.
2. The MHS Board of Trustees recognizes the process of removing artifacts and library materials from the collection is an irreversible, and potentially controversial, action that can only be approved after careful deliberation and scrutiny. From initial staff recommendation to final Board approval, every reasonable attempt will be made to identify any potential current and future uses for the items 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 three years.

### C. Reasons for Deaccessioning Material from Collections

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

1. The material is outside the scope of the collections as defined in the acquisitions criteria, and is not useful for research, exhibition, or educational programs in the foreseeable future.
2. The material is a duplicate or redundant copy, and a better example of the material has been acquired by MHS.
3. The material lacks physical integrity, has deteriorated beyond a useful life, and cannot be reasonably conserved.
4. The material threatens the physical health and safety of the staff, visitors, facility, or other collections and this condition cannot be remedied.
5. The material is no longer relevant or useful to the MHS mission.
6. MHS cannot properly care for the material, either due to its size, condition, or complexity.



#### D. Procedure

1. Any staff member may propose items for deaccession to the Chief Curator or the Director of Library Services at any time. The Chief Curator or Director of Library Services shall provide an opportunity for opposing opinions by any other staff members.
2. Routine library replacements, also known as weeding, may be made at the discretion of the Director of Library Services. Deaccessioning of any rare, unusual items, or major library collections shall be reviewed by the Collections Committee and the Board of Trustees.
3. Once accessioned, library manuscript collections are subject to further archival appraisal. Archival appraisal, in accordance with the Society of American Archivists standards, includes an in-depth review of a collection to determine the archival value. Under the supervision of library collections staff, portions of a manuscript collection may be weeded during the processing phase should they be found to represent excessive duplication, fall outside the MHS collecting scope, hold no archival value, or possess other qualities that render their retention inappropriate due to their condition, privacy considerations, etc. Items weeded during an archival appraisal and in the processing phase are not considered deaccessioned, and therefore not subject to approval by the Collections Committee and the Board of Trustees.
4. The Chief Curator or Director 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 MHS Board of Trustees or Executive Committee for consideration.
5. If the MHS Board or Executive Committee approves the recommendation for deaccessioning, the material 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 six-months has passed, the affirmative decision by the Board of Trustees to deaccession materials from the collection becomes final, and the deaccessioned material may be transferred, sold, or disposed of as appropriate (See "Methods of Disposition").
6. Any rejected recommendation may be reconsidered by the Board or the Executive Committee at a subsequent meeting.

#### E. Methods of Disposition

Deaccessioned material will not be returned to the original donor or their heirs, or given or otherwise transferred to any private individual. A deaccessioned item can only be:

1. Transferred, exchanged, or sold to appropriate tax-exempt collecting institution(s) where the material will be accessible to the public, and serve the public good.
2. Sold at an advertised public auction (which is preferable), or other public market place, such as to dealers for resale. Members of MHS's staff, volunteers, Board of Trustees, and committee members, as well as their immediate family, are prohibited from directly and knowingly purchasing material MHS offers for sale or at auction.

3. Destroyed, if the items cannot be repaired or conserved, or if they present a physical threat to life or property.

#### F. Proceeds from Deaccessioning

1. Monetary proceeds from the sale of deaccessioned material will be placed in a restricted fund dedicated to new acquisitions or conservation of MHS collections. MHS collections shall not be deaccessioned or disposed of in order to provide financial support for institutional operations, facilities maintenance, or any reason other than the acquisition or conservation of collections.
2. Proceeds from the routine sale of duplicate, out-of-scope, or superseded (i.e., weeded) books and other library material will be placed in the Library budget for acquisitions.
3. The Chief Curator or Director of Library Services may present special circumstances regarding the use of proceeds from the sale of deaccessioned material for purposes other than acquisition or conservation to the Executive Director, Collections Committee, and Board of Trustees (or Executive Committee) for approval.

#### G. Documentation

1. All records (paper and digital) pertaining to the acquisition, cataloging, and disposition of the deaccessioned material shall be retained by MHS. These records shall be marked "Deaccessioned" with a date and a description of the disposition method.
2. Withdrawn library material will be marked accordingly and the catalog record updated.
3. 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.
4. Deaccessioning at MHS is a transparent process. All information regarding deaccessions is considered public information and can be made available upon request to interested parties, with reasonable advance notice.

## XII. OUTGOING LOANS

MHS is encouraged to lend items from its collections for educational and scholarly purposes to extend the availability of its collections to others. Outgoing loans are an important way of broadening public awareness of, and maximizing accessibility to, Maine Historical Society collections. These loans shall be consistent with the long-term preservation of the collections and the needs of MHS's exhibition, library, and educational programs. Loan policies are designed to protect the safety of any items loaned from the collections.

### A. Criteria

1. Items from the Library and Museum collections may be loaned to museums, historical societies, and other non-profit institutions or peer organizations with a mission or purpose analogous to MHS that is capable and experienced in handling collections. MHS collections will not be loaned for purely decorative or commercial purposes. Loans shall be made for the following reasons:
  - a. Exhibition
  - b. Scholarly use, including research, examination, or identification
  - c. Educational use approved by MHS
2. Exceptions may be considered by the Collections Committee on recommendation of the Chief Curator, the Director of Library Services, or the Collections Manager/Registrar.

### B. Authority

1. The MHS collections staff will act as representatives of the Board of Trustees in all matters relating to outgoing loan requests.
2. In consultation with the Collections Manager/Registrar, the Chief Curator will approve requests for museum materials, and the Director of Library Services will approve requests for library materials. The Collections Manager/Registrar will oversee and coordinate all necessary activities and paperwork regarding the loan.
3. Loan requests and renewals will be evaluated on a case by case basis and may be approved or declined based on the following considerations:
  - a. Length of loan period.
  - b. Environmental and/or security conditions in the exhibition facility.
  - c. Physical condition of the material requested and its ability to withstand the stress of packing, transport, handling, and fluctuating environmental conditions.
  - 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.

## C. Terms and Conditions

1. Loan requests detailing the reason for the request, dates and description of the exhibition (if applicable), and insurance and transport arrangements, must be received in writing three (3) months prior to the beginning date of the loan.
2. An up-to-date report (the American Alliance of Museums' *Standard Facilities Report* or equivalent) detailing the Borrower's exhibition facilities and methods of, handling, environmental and security conditions, and temporary storage situations must be submitted to MHS in order for the request to be considered.
3. Materials borrowed shall be given special care at all times to ensure against loss, damage or deterioration. The Borrower must agree to meet any special requirements for installation and handling as noted in writing on (or attached to) the MHS Outgoing Loan 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. The material shall not be modified in any way and must remain in the condition in which it is received. No cleaning, repair work, retouching, remounting, marking, or copying 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 on exhibit 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, digitize, or publish images of the item(s). Maine Historical Society must approve all reproduction, including but not limited to photography, filming, and scanning. Permission to publish, distribute, display on the Internet, or make any kind of copy of loaned items for sale must be requested through our Image Services Coordinator.
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 material and in the same manner as received, unless authorized by MHS to do otherwise.
11. The placement of full, wall-to-wall 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 insurance replacement value of items lent by the Society shall be at the expense of the Borrower. MHS collections staff may assign insurance replacement value based on comparables, when appropriate. 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 loaned items at any time if the MHS collections staff feels that the loaned items are at excessive risk, or that the outgoing loan conditions have been violated.

D. Renewals

1. Loans will be made for a specified period of time as agreed upon and recorded on the Outgoing Loan form. 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 an Outgoing Loan Extension 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 at the discretion of the Director 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. Scholarly use, such as research, examination, or identification

#### B. Authority

1. MHS collections staff will act as the representatives of the Board of Trustees in all matters relating to incoming loan requests.
2. The project director or exhibit curator will approve requests for in-coming loans, in consultation with the Collections Manager/Registrar. The Collections Manager/Registrar will oversee and coordinate all necessary activities and paperwork regarding 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 material on "permanent" or indefinite-term loans.
  - a. In the past, MHS did accept material 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 Collections Manager/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

material is deemed crucial to the exhibit, as determined by the MHS collections 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 material on loan that is in such condition to withstand the stress of packing, transportation, handling, and exhibition.
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 valuation.
  - 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.
  - e. MHS cannot accept responsibility for any error or deficiency in information furnished by the Lender or any lapses in the Lender's insurance coverage.
5. Photography
  - a. Unless permission is refused in writing, it is understood that all items included in the Incoming Loan Agreement may be photographed and reproduced in an exhibition catalog or for publicity purposes connected with MHS.

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, and at the discretion of the Director of Library Services.



#### XIV. Facility Rental Policy

The use of MHS facilities by outside groups may impact MHS collections, as well as storage and exhibit areas. In order to protect and preserve the collections, the following terms and conditions shall be followed.

##### A. Facilities Available for Rental

1. The Earle G. Shettleworth, Jr. Lecture Hall is a multi-use facility with seating for up to 100 people and table seating for 65.
2. The William King Conference Room is a small conference room with seating for up to 14 people.
3. The Longfellow Garden. The garden's maximum capacity is 80 people.
4. Brown Library Conference Room is a small conference room located in the library with seating for up to 12 people.

##### B. Terms and Conditions of Rentals (partial)

1. The signed rental agreement must be returned to MHS at least a week prior to the day of the event.
2. At least one MHS staff representative will be present from set-up through clean-up. The number of staff members present will be determined by the amount of spaces reserved for the rental and the number of guests attending. The staff representative will direct caterers and other vendors and will also be present to ensure the smooth execution of the event and the protection of MHS buildings and collections.
3. MHS is not licensed to serve alcohol. If alcohol will be served at the event the Client must hire a licensed vendor. MHS requires that Clients and their agents conduct the event in accordance with all applicable local, state, and federal statutes.
4. Red wine and red juice are prohibited inside the buildings. No food or drink is allowed within the museum gallery.
5. Smoking is not permitted anywhere on the premises, including the grounds.
6. Open flames of any kind are not allowed.
7. The client must arrange a site visit at least a week prior to the event. Visits are by appointment only.
8. Rentals cannot interfere with regular MHS operations and events.
9. Refer to MHS "Facilities Rental Policies and Agreement" for complete list of terms and conditions.

## XV. GLOSSARY

Accession – A set of one or more artifacts, objects, manuscripts, etc., received from the same source at the same time; acquisition that a museum has taken ownership of and holds in the public trust.

Accession number – A unique number that is assigned to an accession.

Accession register – A paper or electronic record of accession information; a document that includes, among other data, the accession number; date and nature of acquisition (gift, excavation, expedition, purchase, bequest, etc.); source; brief identification and description; condition; provenance; value; and name of staff member recording the accession.

Acquisition – Something acquired by MHS (but not necessarily involving the transfer of ownership).

Appraisal – A judgment of what something is worth; an expert or official valuation, as for taxation; the process of determining the monetary value of something.

Archival appraisal - In an archival context, appraisal is the process of determining whether records and other materials have permanent archival value.

Archives – The non-current records of an organization or institution preserved because of their continuing value; the agency responsible for selecting, preserving, and making available records determined to have permanent or continuing value.

Artifact – Something made by or modified by a human being.

Authentication – To establish the authenticity of something; to prove genuine.

Bequest – Transfer of property to an institution under the terms of a deceased person's will. Bequests may be conditioned upon the happening or non-happening of an event (such as marriage), or executory in which the gift is contingent upon a future event. Bequests can be of specific assets or of the residue (what is left after specific gifts have been made).

Blanket insurance policy – An insurance contract that covers several classes of property at a single location or at multiple locations.

Bylaws – The written rules for conduct of a corporation, association, partnership, or any organization.

Catalog – The list of the contents of a collection.

Catalog record – A paper or electronic record created during the cataloging process.

Cataloging – The process of organizing the information about an accession by creating records of specific information; the creation of a full record, in complete descriptive detail, or all information about an object, assembly, or lot, cross-referenced to other records and files, and often containing a photograph, sketch, film, sound, or other electronic data.

Certificate of gift – A contract that transfers ownership of an object from a donor to an institution and describes the conditions of the gift.

Certificate of insurance – A document, signed by the insurance company or its agent that is written evidence of insurance in force at the time of issuance.

Collections – An organized accumulation of objects or specimens that have intrinsic value; a group of specimens or objects with like characteristics or a common base of association (e.g., geographic, donor, cultural); objects or specimens that the museum holds in trust for the public.

Collections management – The activities that relate to the administration of collections, including planning, development, care, conservation, and documentation; caring for collections and making them available for use.

Collections management policy – A written document, approved by the institution’s governing authority, that specifies how collections will be acquired, accessioned, documented, stored, used, cared for, and disposed of.

Collections stewardship – The careful, sound, and responsible management of collections that are entrusted to the museum’s care, including the legal, social, and ethical obligations to provide proper physical storage, management, conservation, and care for the collections and associated documentation.

Condition report – An accurate, informative descriptive report of an object’s or a document’s state of preservation at a moment in time.

Conservation – Maximizing the endurance and minimizing the deterioration of an object or specimen through time, with as little change to it as possible.

Copyright – Legal recognition of special intellectual property rights, distinct from the right of possession, that a creator may have for a work. Copyright exists for original works in tangible media and covers the rights to reproduce, adapt, distribute, perform, or display the work.

Credit line – Information that details the source of an object and may reference the donor or lending institution.

Culling – The process of selecting and removing objects from a group.

Curation – The process of managing and preserving a collection according to professional museum standards and archival practices.

Deaccessioning – The formal process of removing an accessioned object or group of objects from MHS’s permanent collection.

Deferred donation – A donation in which a donor retains ownership of an object for a specified period of time, but wants assurance that the object will be accepted by the museum at the termination of the retention period (a synonym is promised gift).

Deposit collection – A library collection that is housed and cared for by MHS, but that is owned by another and MHS does not have legal title to.

Disposal – The process of physically removing a deaccessioned object from MHS’s custody.

Documentation – The supporting evidence, recorded in a permanent manner and using a variety of media, of the identification, condition, history, use, or value of a specimen, object or collection.

Element – A constituent part of a whole; a member of a set (e.g., an artifact, object, or specimen in a museum collection).

Exchange – To trade or barter property, goods and/or services for other property, goods and/or services, unlike a sale or employment in which money is paid for the property, goods or services.

Ethics – A set of principles or values to govern the conduct of individuals.

Facility report – A report prepared by an institution that outlines its facilities, environmental controls and monitoring, and collections management procedures.

Found in Collection – Material in the MHS collections for which the original source or donor is unknown.

Gift – The voluntary transfer of ownership of property completely free of restrictions.

Incoming loan – Objects, lots, specimens, or archival materials to which MHS does not have legal title but for which it is legally responsible while they are in its possession and used in MHS-sponsored activities.

Indefinite loan – A loan that has no set duration or termination date.

Integrated pest management (IPM) – The coordinated use of biological and environmental information with selected control measures to reduce or eliminate pest damage; a holistic approach to pest management decision making, taking advantage of all appropriate pest management options, including chemicals.

Inventory – The process of physically locating objects through an inventory.

Loan – A temporary transfer of a collection object from a lender to a borrower; a loan does not involve change in ownership.

Loan agreement – A contract between a lender and a borrower of an object, specifying the object and outlining the conditions of the loan and the respective responsibilities of each party.

Long-term loan – A loan contract with dates in excess of one year.

Material – Relating to, consisting or, or derived from matter. A general term to describe all the types of items held in the MHS collections.

Mission – Statement approved by the MHS's governing authority that defines the purpose of MHS.

Off-site storage – Collections storage at a site that is separated from the MHS Congress Street campus.

Old loan – An expired loan or loan of unlimited duration left unclaimed by the lender (also referred to as an unclaimed loan).

Outgoing loan – An object loaned by MHS to another institution. It is an outgoing loan from the perspective of the lending institution; such a loan would be an incoming loan to the borrowing institution.

Policy – A guideline that regulates organizational action. Policies control the conduct of people and thus the activities of systems.

Procedure – Specific instructions for enacting and carrying out a policy.

Provenance – For works of art and historical objects, the background and history of ownership.

Public trust – A relationship in which MHS holds property that is administered for the benefit of the public.

Records – All information fixed in a tangible (textual, electronic, audiovisual, or visual) form that was created by an organization as part of its daily business.

Repository – A facility that can provide long-term professional, systematic, and accountable curatorial services for a collection that it does not own.

Restricted gift – The voluntary transfer of ownership of property with conditions and/or limitations places upon that ownership.

Risk management – A program of risk control that includes analyzing the probability of risks to MHS collections, facilities, visitors, and staff as well as planning and implementing appropriate preventative measures and response methods.

Scope of collections – A statement that defines the purpose of a collection and sets agreed upon limits that specify the subject, geographical location, and time period for the collection. The statement also considers the uses to which a collection will be put, and states the types of objects that will be acquired to fulfill the purposes of the collection.

Short-term loan -- A loan contract with dates not more than one year.

Stewardship – The careful, sound, and responsible management of that which is entrusted to MHS's care.

Title – The possession of rights of ownership of personal property. Separate rights of possession include copyright interests, trademark rights, and any specific interests that the previous owner may have reserved.

Transfer – The voluntary transfer of ownership of property from one collecting institution to another, completely free of restrictions.

Wall-to wall coverage – Insurance that covers an object on loan from the moment it is removed from its normal resting place, incidental to shipping; through all phases of packing, transfer, consolidation, exhibition, and repacking; until it is returned to its original resting place, or a place designated by the owner.

Weeding - Removing materials from a library or museum collection in a systematic and deliberate way. It is an ongoing part of collection development, and a planned and thoughtful action.

Withdrawal – The removal of printed material from the Library collection that is out-of-scope, duplicate, or superseded. The removal of unaccessioned objects from the museum collection.