

**COLLECTIONS MANAGEMENT POLICY**  
**Bastrop County Historical Society Museum**  
**Acquisition, Accession, and De-accession of Objects**

**General policy and definitions**

Acquisition is the process of obtaining objects for exhibition and research through donation, purchase, bequest, loan, transfer from or exchange with another institution, or other legal means. Accessioning is the formal process of accepting and recording an object into the collection. Acquisition does not necessarily entail accessioning, as described below, but is a necessary prerequisite for accessioning. Loaned objects are acquired and can be accessioned.

The Society intends to continue to build the Museum collection through the acquisition and accession of objects that fit the mission of the Museum. The historical relevance of the objects will be stressed over their quantity.

The Board of Trustees of the Society delegates the management of the collection to the President of the Society, as one of her/his primary duties. The President will keep the Board advised in all significant matters relating to the collection, and may establish committees comprised of Society Trustees, members and employees as may be necessary to manage the collection.

**ACQUISITION OF OBJECTS**

**Acquisition criteria**

Each Acquisition will be evaluated and documented as to its age and origin, previous ownership and use, and historical and exhibition relevance vis-à-vis the Museum mission and existing collection; evaluation and documentation will be completed to the extent reasonably possible, given data available from previous owners and existing records.

All Acquisitions will 1) conform to the mission of the Museum, and 2) fall within financial and physical ability of the Museum to properly curate (preserve, restore, maintain, house and exhibit or utilize) the acquired objects.

The Museum will not knowingly accept any object acquired by illegal or unethical means, and will employ only legal and ethical standards in the acquisition, possession and use of its collection.

The donor (owner) of all Acquisitions will transfer complete ownership (provide clear title) to the Society without restrictions, limitations, or conditions. Transfer of legal title is through a signed **Deed of Gift** (call the museum, 512-303-0057, to request a copy of the form) between the Society and the owner.

Restrictive or conditional donations will be considered only when the long term advantage to the Museum is unequivocal. Any consideration of such donations will be accompanied by a legal document that specifies all restrictions or conditions, and a completed **Loan Agreement** (call the museum, 512-303-0057 to request a copy of the form).

### **Acquisition means and stipulations.**

The Museum may acquire objects by gift, bequest, purchase, exchange, loan, or other method that transfers title to the Museum (Deed of Gift) or provides for the use of the object by the Museum (Loan Agreement), as described above.

All acquisitions must be approved by a majority vote of the Acquisitions Committee. The Acquisitions Committee shall consist of the President of the Society and two other members of the Board of Trustees. The Society Administrator and Museum Curator will serve as Ex-Officio members of the Acquisition Committee.

No other member or entity of the Society can obligate the Museum to accept an acquisition for the collection, nor offer any assurance that a donated object will be displayed permanently, except the Board of Trustees or their designees.

The Society does not provide outside parties with appraisals of objects donated, transferred or exchanged to the Museum. No member of or entity within the Society, except the Board of Trustees or its designees, is authorized to appraise the value of any object for a public purpose in the name of the Society or Museum.

When no market-value appraisal acceptable to the Acquisition Committee is available, the Committee should assign an appropriate value to objects donated for internal Society purposes. However, without an acceptable appraisal, the assigned value should never exceed \$500.00, whatever the actual market value of the object might be.

Objects of historical significance will be accessioned into the collection, as described below. The Society may also accept donation of documents, materials, display furnishings, etc. that do not have historical significance but otherwise are in accord with the mission of the Museum. Such objects will be recorded as donations to the Society, but will not be accessioned or considered a part of the Museum collection.

### **ACCESSION OF OBJECTS**

Accessioning is the recording process that formally incorporates objects into the Museum collection. The process is initiated by the transfer of clear title to the Society or the receipt appropriate loan documents, as described above. Title is considered to be transferred when the Museum receives a Deed of Gift signed by the owner/donor, a bill of sale is acknowledged as paid in full in the case of purchased objects, or when a document is signed by all interested parties in the case of transferred objects.

All Acquisitions will be accessioned in a timely manner. Accessioning includes the following records and steps; Completed gift agreement or bill of sale, completed Accession records form, entry in the Past Perfect Catalogue, labeling of the item, (photograph of the item,) and finding a storage location for the item. Other documents relating to the item will also be included and stored at the museum. The records, both paper documents and electronic data entry, are kept on the Museum.

Upon accessioning, the Museum assumes the full obligation for the proper care and management of the object. Assessioned objects are subject to de-assessioning, as described below.

Objects of apparent historical significance found in the Museum but lacking documentation of acquisition cannot be assumed to belong the Society, and accessioned or disposed. These objects are abandoned property and the Texas law (Title 6A, Chapter 80) for museum abandoned property and old loans must be followed in order to gain clear title. Once clear title is established, the objects undergo acquisition review.

## **DE-ACCESSIONS**

### **Policy**

From time to time objects will need to be eliminated from the collection to provide better utilize the Society's financial, physical, and personnel resources. This process of de-accessioning will be based on the historical relevance of the object and its appropriateness to the mission of the Museum.

No object is de-accessioned without careful review, evaluation by curatorial staff, and documentation of clear title. The Museum should initiate a de-accessioning evaluation when one or more of the following conditions exist:

- The object appears to be outside the scope of the mission of the Museum.
- The object has deteriorated beyond usefulness to Museum activities.
- The object has failed to retain its authenticity or documentation.
- The object has been lost or stolen and remains lost for longer than 2 years.
- The Society is unable to preserve the object properly.
- The object is a duplicate or reproduction, and may no longer be needed.
- A more appropriate repository may exist for the object.
- The object might be an items protected under NAGPRA (Native American Graves Protection and Repatriation Act), ARPA, AIRFA, or any other relevant acts or treaties.

As a courtesy, reasonable efforts will be made to contact donors or their heirs, and living artists prior to the de-accessioning of objects from the Museum's collections.

### **Procedure and Disposition**

Decisions on de-accessioning objects in the Museum collection will be made by the De-accession Committee, which is appointed by the Board of Trustees and will include the President, after completion of a **De-accession** form (see standard form in Appendices). The approval of the Board of Trustees will be required if the estimated value of the object is over \$500.00. Objects approved for de-accessioning will be disposed of in one of the following ways:

***Sold*** privately, or at public auction or sale.

***Exchanged*** with organizations, institutions, or other relevant sources for objects, library or archival material needed in the San Jacinto Museum of History collections.

***Transferred*** to another museum or public educational institution.

***Destroyed*** if the value is too low to warrant sale, exchange or transfer.

If a donated object is disposed of under the foregoing methods at a date that is within two years of donation, and the donor has claimed at least \$5,000 for donated property under Section 170 of the Internal Revenue Code for charitable contributions, the Society will file an information notice (IRS form 8282) with both the donor and the Internal Revenue Service.

Objects approved for de-accession shall not be given, sold, or transferred in any other method to its employees and Board of Trustees or their immediate families.

## **LOANS**

Loans are recognized as a special type of Acquisition, requiring considerations over and above objects obtained by other means.

The Museum has accepted objects for the collection through both donations and loans since its inception in 1952, leading to objects that appear to be in the undesirable status of “permanent” loans. A loan conversion project will be undertaken secure title to such objects.

Any object that appears to have been in the possession of the Museum for a period of 15 years or greater, as described under Chapter 80 of the Texas Property Code, will be deemed to subject to this process.

The loan-conversion project will comprise the following steps: prepare a listing of objects for which no documentation of donation is available (limit the first listing to those objects with the greatest historical value to the Society); collate documentation on previous ownership; identify and contact the previous owners or their known heirs; complete Deed of Gift (or Loan Agreement) forms for each object or group of objects from the donor, following procedures described above.

All incoming or outgoing loans are made under authorization of the President, after the completion of a Loan Agreement and other documents as may be necessary. The Museum will keep a copy of the agreement and a loan number and record will be created in the collections database.

### **Incoming Loans**

The Museum will not accept any new object under loan conditions that might put the Museum at substantial future risk of creating “permanent” loan status for the object.

Incoming loans will be permitted only when a satisfactory means of communicating with the owner of the object(s) is available for the entire loan period. If this condition is met a loan period of any length can be set. Each object taken on loan will be accompanied by a completed Loan Agreement (call the museum 512-303-0057 to request a form) with special care given to the additional information required in the case of long-term loans from private parties.

An incoming loan may be made for the purpose of inspecting an object for a possible donation. The Museum, however, will guard against serving as storage for private collections.

The Museum will seek a renewal of the Loan Agreement from the owner every four years, and will attempt to return the object to the owner if the renewal is not received within

6 months of submission of the renewal request.

If the owner cannot be contacted using the information specified in the Loan Agreement, including its renewals, the Museum will endeavor to renew its attempt to locate the owner every year until a renewal is received or the object(s) is returned.

## **Outgoing Loans**

An outgoing loan of an object in the collection can be made upon the approval of the President for the purpose of conservation or identification, as well as research or exhibition at another institution. Outgoing loans can be made for any period of time, so long as the period is clearly specified and all conditions of the Loan Agreement are met.

A loaned object must be able to withstand the stresses of handling, transit, and exhibition or other use specified in the loan agreement. The Museum generally will not loan objects that are deemed to be in poor or unacceptable condition, unless the borrower is willing to pay for conservation in connection with the loan.

The Museum generally will not make loans of objects in the collection to individuals, but exceptions might be made when a loan will facilitate historical research in accordance with the Museum's mission, the individual is to perform needed restoration of the object, or a well-defined educational purpose in keeping with the Society mission is involved.

Normally a loan request is to be made to a recognized educational institution. The Museum shall only make loans to institutions that meet the basic standards of object care. If the Museum is unable to determine a standard of care, the Society Administrator, Museum Curator or another Society representative shall submit an American Association of Museum's Standard Facilities Report to be completed by the potential borrower.

The borrower is responsible for the insurance of all loaned objects from the time the object leaves the Museum to the time that the object is received upon return at the Museum.

## **ACCESS AND CARE**

### **Access**

The Museum's collection is housed in the Museum, or in storage facilities that the Society utilizes from time to time. Objects are available for public inspection at the Museum, subject to the preservation requirements of the object and availability of Museum staff to facilitate the examination of the object.

Access to the collection must be restricted to ensure the safety of the objects from theft, loss, or damage. The President is responsible for limiting the number of keys and the number of people who has access to the museum outside normal hours of operation.

A separate policy relating to tours of the collection is appended. Appointments for object research generally will be made in advance with the Society Administrator or Museum Curator; access is not guaranteed without an appointment. The Museum may at its sole discretion refuse access or various forms of access to objects. For extensive use of the Museum collection, a researcher is to submit a research proposal prior to the visit. Use of the collections database for research shall be conducted or assisted by the Museum staff.

## **Object Care**

The Society is committed to provide a high standard of professional care for its collection and other materials in its custody. The staff practices preventative conservation, acting in a manner supportive of the object condition and longevity by preventing deterioration and destruction caused by the nature of the material, the environment within the Museum, and the use by visitors and researchers. Through the process of conservation assessments, which are recorded in the collections database, the staff will make recommendations for conservation repair when necessary. Records of changes in the object's condition will be maintained in the database and object holding record.

## **Collections records**

The principal collection record-keeping method employed by the Museum is the well-known computer program Past Perfect Museum Software. The software provides a catalogue and accession record for all objects, photographs and archives. Paper records are maintained for selection Museum actions, including related correspondence and completed forms (see Appendices). The vast majority of the collection has been entered into the Past Perfect Museum Software. Our objective for the future is to make the collection of photographs and archives more detailed and complete to make it searchable in the Past Perfect software and therefore more accessible for the public.

Approved by the Board of Trustees, July 19, 2007