

Oak Park River Forest Museum Collection Management Policy



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Approved by the Executive Director: December 20, 2018

Approved by the Board of Trustees: January 9, 2019

Peggy Tuck Sinko, President

Kurt Etchingham, Vice President

Mary Ann Porucznik, Secretary

Jan Novak Dressel, Past President

Directors: Mary Boyaris; Sara Doherty; James Grogan; James Mahoney; Clyde Watkins

Table of Contents

I.	Mission Statement	3
II.	Purpose of the Collections Management Policy	3
III.	Scope of Collections	4
IV.	Acquisitions	5
V.	Deaccessions	7
VI.	Loans	8
VII.	Access to the Collection	9
VIII.	Record Keeping and Documentation	10
IX.	Care of Collections	12
X.	Policy Approval and Change	13

I. Mission Statement

Oak Park River Forest Museum is operated by The Historical Society of Oak Park and River Forest, a 501(c)3 organization founded for educational and charitable purposes. Our mission is:

- 1) To bring together people who are interested in Oak Park and River Forest.
- 2) To study, and provide means and facilities of study, of the history of Oak Park and River Forest and the region.
- 3) To acquire, collect, preserve, and display materials and literature relevant to the history of the Oak Park and River Forest area.
- 4) To assist in the designation and preservation of buildings, monuments, and other sites significant to the history of the area.
- 5) To publish and disseminate materials and information relative to the history of the area.
- 6) To operate an archive, library, and museum.

II. Purpose of the Collections Management Policy

This Collections Management Policy governs the management and care of the tangible collections owned by Oak Park River Forest Museum. The policy is intended to serve as instructions to the Museum staff and volunteers responsible for collections management and as general guidelines and information for interested members of the public.

A. Responsibilities

Oak Park River Forest Museum is responsible for collecting and preserving historical artifacts that contribute to the story of the history of Oak Park and River Forest and their environs. In accordance with generally accepted practices, Oak Park River Forest Museum is also responsible for documenting, accessioning, preserving, and exhibiting such materials and making them accessible to the public and available for study. Therefore, Oak Park River Forest Museum has the sole authority to accession gifts and accept loans of collections utilized by the Museum.

B. Code of Ethics

In all matters dealing with the collection, staff and volunteers will ascribe to the standard ethics policies set forth by the American Alliance of Museums (AAM), the Society of American Archivists (SAA), and the Protocols for Native American Archival

Materials. Under no circumstances shall staff members or volunteers use their positions for financial gain. Museum staff and volunteers should strive to avoid situations in which there is a potential for conflict of interest that may affect the quality of work, lead to the dissemination of false information, or give the appearance of impropriety. Staff and volunteers and their immediate families shall not privately acquire objects through the deaccessioning process (see Deaccessions, page 7).

III. Scope of the Collections

Oak Park River Forest Museum's materials have been acquired over the course of years since the establishment of The Historical Society of Oak Park and River Forest. The guidelines below highlight the collection areas on which Oak Park River Forest Museum will focus going forward.

A. The Library and Archives

Documents, images, and publications pertinent to the interests of Oak Park River Forest Museum, including but not limited to:

- 1) Manuscripts pertaining to all aspects of Oak Park and River Forest history, emphasizing social, cultural, educational, philanthropic, business, and economic activities as expressed in personal, commercial, institutional, and governmental documents.
- 2) Published works that reveal the history of Oak Park and River Forest, with particular emphasis on local authors.
- 3) Photographic materials of people and places related to Oak Park and River Forest.
- 4) Periodicals of Oak Park and River Forest, including newspapers, newsletters, and bulletins.
- 5) Digital materials in various formats, including still images files (JPEG, TIFF, PDF), audio files (WAV, MP3), and video files (MOV, AVI, WMV).

B. The Museum

Artifacts, especially those produced or used in Oak Park and River Forest or with strong regional associations, which build upon the strengths of the present collection. This emphasis includes, but is not limited to:

- 1) Clothing and decorative arts.
- 2) Folk art reflecting the lives and perspectives of traditional artists and craft workers in a variety of media.

- 3) Artifacts of indigenous peoples from this geographic area, excluding human remains and sacred objects. All such artifacts must adhere to the Protocols for Native American Archival Materials.
- 4) Fine art depicting people and places in Oak Park and River Forest with emphasis on the work of local artists.
- 5) Commercial artifacts, including those used in accounting, sales, and the operation of local businesses.
- 6) Governmental artifacts, including those used in the operation of or produced under the auspices of local government.
- 7) Artifacts associated with or used by local cultural, philanthropic, and educational institutions.

IV. Acquisitions

For the purpose of this policy, acquisition is defined as the discovery, evaluation, physical and legal custody, and receipt of archival/library materials and museum artifacts. Collection-building activities are fundamental to the long-term success of Oak Park River Forest Museum. All donations must be outright and unconditional gifts to be used at the discretion of the Museum. Title to all materials and artifacts shall be free and clear without restriction to use or future disposition.

A. Criteria

- 1) The material(s) or artifact(s) must be relevant to and consistent with the purposes and activities of the Museum.
- 2) The Museum must be able to provide for the storage, preservation, and security of the material(s) and or artifact(s) while ensuring public access and adhering to accepted professional standards.
- 3) Materials and artifacts will be a part of the Museum's permanent collection as long as they retain their physical integrity, identity, and authenticity, and/or as long as they remain useful for the purposes of the Museum.
- 4) Provenance of the material or artifact must, to the degree possible, be documented.
- 5) Moral, legal, and ethical implications of the acquisition must be considered.
- 6) Copyright issues, including laws regarding rights and usage, must be considered.
- 7) Maintenance and restoration needs of materials and artifacts must be considered. Materials and artifacts that need restoration may be acquired if the costs of restoration and storage requirements are considered.

B. Means of Acquisition

Materials and artifacts may be acquired by purchase, commission, bequest, gift, exchange, field collection, and/or abandonment. No materials or artifacts shall be accepted or acquired which were collected in a manner contrary to state law, federal law, regulation, treaty, and/or convention.

The Museum subscribes to the provisions of the UNESCO 1970 Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transport of Ownership of Cultural Property. The Museum shall refuse to acquire material and artifacts where there is cause to believe that the circumstances of their collection involved needless destruction of historic sites, buildings, structures, habitats, districts, and associated objects.

C. Procedure

Authority to acquire library and archival materials or museum artifacts rests with the Executive Director within the confines of the Collection Policy and the annual budget approved by the Board of Directors. Authorization to purchase materials with a value of less than \$500 is delegated to the Executive Director. The purchase of item exceeding an estimated market value of \$500 shall be approved by the Board of Directors prior to purchase.

No staff member or volunteer may obligate the Museum to accept any material or artifact. Staff members and volunteers will not appraise or otherwise place a monetary value on materials or artifacts brought to the Museum by the public for donation or other purposes. Staff members or volunteers will not attempt to attribute, identify, or authenticate items for the public. Donors desiring to take an income tax deduction must obtain an independent appraisal from an authorized appraiser or consultant. Records of such appraisals may be kept by the Museum with the Deed of Gift in its permanent collection until the material(s) or artifact(s) are deaccessioned.

Oak Park River Forest Museum provides proper care for materials or artifacts left for evaluation and possible acquisition, but does not assume any responsibility for damage or loss to said materials or artifacts until they have been accessioned. If donors require insurance for donated materials or artifacts, this insurance will be provided by the donor.

The donor shall complete and sign a Deed of Gift. Materials or artifacts deposited on the Museum premises without completion of a Deed of Gift will only be retained for a period of sixty (60) days. The Museum accepts no responsibility for notification of donors for the return of such deposits. Materials or artifacts not claimed within sixty (60) days of deposit are considered abandoned property and as such are subject to state law pertaining to the same (765 ILCS 1033 Museum Disposition of Property Act). Abandoned materials or artifacts of negligible value may be disposed of by the Executive

Director. Materials or artifacts of value may be disposed of under law by the Board of Directors.

V. Deaccessions

Deaccessioning is the formal process of permanently removing an acquisition from the collections of Oak Park River Forest Museum. The purpose of deaccessioning an acquisition is to allow for the improvement of the overall quality of the collection. The deaccessioning process for materials and artifacts prevents random or rash decisions. The Executive Director and/or Collections Committee initiate the process of deaccessioning with input from staff members and volunteers. All items proposed for deaccessioning shall be considered by and voted on by the Collections Committee, which shall pass its recommendations for disposition to the Executive Director and the Board of Directors. It is the responsibility of the Executive Director and the Board of Directors to approve all deaccessions. It is the responsibility of Museum staff to actually dispose of deaccessioned materials or artifacts following standard procedures. A Deaccession Form must be completed for each material, artifact, and collection approved for deaccession by the Executive Director and Board of Directors.

A. Criteria (one or more of the following)

- 1) The material(s) or artifact(s) is no longer relevant to mission of the Museum.
- 2) The Museum cannot preserve the material(s) or artifact(s).
- 3) The material(s) or artifact(s) has deteriorated beyond its usefulness.
- 4) There is a need or opportunity to upgrade the collection.
- 5) The material(s) or artifact(s) poses a hazard or risk to other objects in the collection or to staff and volunteers.

B. Disposal

- 1) Once materials or artifacts are deaccessioned, their disposition shall be decided by the Collections Committee, based upon the recommendations of the Executive Director and Board of Directors and the input of staff and volunteers. In choosing a means of disposal, the Museum must preserve and promote scrupulous adherence to ethical standards as observed by the AAM and SAA.
- 2) The greatest benefit to the Museum should govern the means of disposal, as long as there is no compromise or appearance of compromise in ethical conduct.
- 3) Preferred methods of disposal are transfer or exchange with another public institution or sale through publically advertised auction. Every effort should be

taken to identify and evaluate the various advantages and benefits available through different means of disposal.

- a. If materials or artifacts cannot be disposed of through preferred means, staff may explore other options and propose them to the Executive Director.
 - b. In the case of disposal by public auction, the Museum's ownership shall be acknowledged in the sale catalog unless deemed inappropriate by the Executive Director.
 - c. Any proceeds realized from the sale of deaccessioned materials or artifacts shall be deposited and used only for further acquisitions or for the Museum collection.
 - d. As a last resort, materials or artifacts that are in such poor condition that they cannot be resold, exchanged, or transferred may be disposed of in a sensitive manner.
- 4) The Executive Director or Collections Committee, with input from staff and volunteers, may make recommendations on the disposition of **non-accessioned materials or artifacts**. Non-accessioned materials and artifacts are donated to the Museum but do not adhere to collection policy guidelines, do not fall within the collecting scope of the Museum, and/or are in such poor condition that they impede access and use by the public. The disposition of non-accessioned materials and artifacts shall be recorded in the corresponding Deeds of Gift. Non-accessioned materials and artifacts may be gifted or exchanged to another tax exempt institution, sold with any proceeds realized to only be used for the Museum collection, or destroyed in a sensitive manner.

VI. Loans

Loans are temporary assignments of collection materials and or artifacts from Oak Park River Forest Museum, or temporary assignments of similar materials and or artifacts to the Museum for stated purposes, such as exhibition and research. These assignments do not involve a change in ownership.

The Museum cannot hope to acquire title to all materials or objects it needs for its exhibits and interpretative programs. Therefore, the Museum will also accept, for a limited time, custody of objects belonging to others for the purpose of exhibition. The Museum also recognizes that its own materials and artifacts can benefit the programs and exhibitions of other museums or sites and, therefore, the Museum will lend materials or artifacts to other institutions when feasible.

It is the policy of the Museum not to loan materials or objects to individuals for any reason. Loans are only made to nonprofit, educational institutions with the ability to properly care for materials and artifacts. The Executive Director and Board of Directors must approve all loans so that proper records can be maintained.

A. Incoming Loans

For exhibitions, research, or other stated purposes, the Museum will make arrangements with institutions or individuals for the loan of materials or artifacts to the Museum. It is the policy of the Museum not to accept indefinite/permanent loans. The Museum will generally accept loan items for a period of no longer than six (6) months. Arrangements for long-term loans may be made with the written consent of the owner who will carry sufficient insurance on the material(s) and or artifact(s). Such loans must be annually renewed in writing. If materials or artifacts are left at the Museum for longer than ten (10) years without a written loan renewal or request for return from the owner or his or her heirs, the Museum will consider them abandoned and will accession them into the collection or dispose of them according to the Deaccessions Policy. Any loan can be considered for acquisition if all parties agree. All acquisitioned loans must have a completed deed of gift.

B. Outgoing Loans

For exhibitions, research, or other stated purposes, the Museum will agree to arrangements with other like institutions for the loan of materials or artifacts from the Museum's permanent collection. Loans of materials or artifacts from the collection can only be made to other nonprofit, education institutions, and will be considered on a case-by-case basis. All outgoing loans are subject to the approval of the Executive Director and Board of Directors. All loans will be made for a period of sixty (60) days unless otherwise stated by the Board of Directors. At the end of sixty (60) days, a privilege of renewal shall be executed if the Executive Director so recommends. Insurance provisions shall be determined by the Board of Directors. An outgoing loan agreement will accompany all loans originating from the Museum and will be signed by both parties. No item in the Museum's collection will be loaned to individuals.

VII. Access to the Collection

Museum collections are educational resources and should be made accessible to the public for research and other approved purposes. However, access to the collections is secondary to their preservation. The condition of the items and the availability of alternative sources or acceptable copies of materials will be considered when granting access. Access to storage areas is limited to those who are accompanied by a Museum staff member or volunteer, or those who are authorized by the Executive Director.

Visitors wishing to use the collection must request an appointment in advance of the time of the visit unless otherwise approved by a staff member or the Executive Director. Authorization of access will be given or denied by Museum staff. Denials may be appealed to the Board of Directors. The individual is expected to work during the Museum's regular operating hours. If the individual wants to take images of artifacts, authorization is required even for private and personal use. Images to be used for publications must provide credit and copyright to the Museum. Individuals wishing to use materials or artifacts for profit-making ventures must honor the Museum's copyright and enter into a licensing agreement with the Museum. Fees may apply for copying or other services. No materials or artifacts may be removed from the premises without the approval of the Executive Director and adherence to the Loan Policy.

Researchers must sign into the Fields Research Center and state the purpose of access and anticipated use of research to determine what materials or artifacts are relevant to their needs. Researchers must follow all established Research Center procedures.

VIII. Record Keeping and Documentation

Documentation on items in the Museum's collection will be maintained in the Fields Research Center and in a content management system (or CMS, e.g. Past Perfect) by staff members and authorized volunteers. The records relevant to the Museum's collection serve several purposes: to document the legal status of materials and artifacts; to document the condition, location, and care of materials and artifacts; and to provide information that establishes the historical and cultural significance of materials and artifacts as provided by staff and authorized volunteers.

The collection records consist of the following:

A. Deed of Gift

When materials and/or artifacts are donated to the Museum, a Deed of Gift form must be completed by the donor and signed by both the donor and a Museum staff member. Every donated material or artifact must have a recorded Deed of Gift. The Deed of Gift records the provenance (to the extent possible) of the material(s) or artifact(s), the date of the donation, a detailed description of the donation, and the donor's information. Deed of Gift forms will be saved in a CMS, and housed and maintained in paper form in the Fields Research Center by Museum staff. Information recorded on the Deed of Gift is critical to creating Temporary Custody Receipts and Accession Records in a CMS.

B. Temporary Custody Receipt

Temporary Custody Receipts are completed for materials or artifacts that need to be evaluated by staff members or authorized volunteers to determine whether they fall within the Museum's collecting scope and may be accessioned. Temporary Custody

Receipts are entered in a CMS by staff or authorized volunteers. Temporary Custody Receipts must be completed if materials or artifacts are not accessioned by staff members after thirty (30) days in Museum storage. Temporary Custody Receipts contain the following information: receipt number, date, description of the donation, reason for temporary custody, location, and disposition information. Temporary Custody Receipts will be saved in a CMS and housed and maintained in paper form in the Fields Research Center by Museum staff. A copy of the Temporary Custody Receipt must be kept with the donation materials and or artifacts.

C. Accession Form

Accessioning is defined as the process of accepting materials or artifacts into the permanent collection of the Museum. All materials and artifacts shall be processed under the procedures and policies adopted by the Board of Directors.

Once materials or artifacts are accepted into the collection, and ownership is legally transferred (signed and completed Deed of Gift), an accession number is assigned. The Accession Form is the official record of the accession, in numerical order, with the following information: accession number, date, description of material and/or artifact, donor, provenance, and location. Accession numbers consist of the year and donation number. For example, the thirtieth donation accessioned in 2019 would have the following accession number: 2019.30. Individual materials and artifacts within a donation are recorded as follows: 2019.30.1, 2019.30.2, etc. Only Museum staff and authorized volunteers may complete accession forms in a CMS. Accession Forms will be saved in a CMS and housed and maintained in paper form in the Fields Research Center by Museum staff.

D. Inventory Worksheet

After materials or artifacts are accessioned, an inventory worksheet may be created by volunteers. Inventory worksheets contain itemized descriptions of an accession. Volunteers must adhere to the Code of Ethics in the Collection Management Policy. Volunteers should refer to the Museum's *Guidelines for Preparing an Inventory* when completing an inventory worksheet. Volunteers should be under the supervision of Museum staff unless given authorization by the Executive Director. Inventory worksheets must be kept with the accession materials and or artifacts. Inventory worksheets serve as informal container lists for an accession, and inform the creation of an Archival Finding Aid for the accession.

E. Archival Finding Aid

The purposes of an archival finding aid are to provide administrative control for the Museum and to establish intellectual control for staff and researchers. DACS (Describing Archives: A Content System) is the approved finding aid creation standard of the SAA, and the standard used by the Museum. After materials or

artifacts are accessioned, the Museum archivist or an authorized volunteer shall create a finding aid using the *Finding Aid Creation Guide* and *Finding Aid Template* created specifically for Oak Park River Forest Museum.

Finding Aids contain the following information: accession number, shelf number, collection title, repository, date, finding aid preparer, extent, creator(s), organizational/biographical history, scope and content note, immediate source(s) of acquisition, conditions governing access, physical access, language of the material, and a series and container list. The completed Finding Aid shall be—to the extent possible—entered into the CMS, and attached as a media file with its corresponding accession number(s). Only the Museum archivist or an authorized volunteer shall enter the Finding Aid metadata in the CMS. A paper copy of the completed Finding Aid must be kept with the associated collection materials or artifacts. If an Inventory Worksheet was completed prior to the creation of the Finding Aid, it must be attached to the Finding Aid and kept with the collection. Finding Aids shall be updated as collections increase or decrease in size due to future acquisitions or deaccessions. Finding Aids shall be saved as media files in the CMS, in paper form with the corresponding collection, and as a backed-up text or PDF file on Museum servers.

F. Deaccession Form

A Deaccession Form, formally called a Deaccessioned Materials Disposition Form, must be completed for each material, artifact, and collection approved for deaccession by the Executive Director and Board of Directors. The Collection Committee shall complete the Deaccession Form and submit it to the Executive Director and Board of Directors. Deaccession Forms contain the following information: accession or temporary storage receipt number, board action date, deaccession date, donor, material or artifact description, restrictions on disposal, and method of disposition. Every Deaccession Form must have an attached Inventory Worksheet, Archival Finding Aid, and/or photograph. Deaccession records must be completed in the CMS in conjunction with the completion of the Deaccession Form. Deaccession Forms will be saved in the CMS, and housed and maintained in paper form in the Fields Research Center by Museum staff.

IX. Care of Collections

All materials and artifacts shall be stored in a manner that provides optimum security, accessibility, and preservation according to current and acceptable museum standards within the Museum's budget. The collections, collections storage, and exhibit areas shall be monitored or inspected periodically, and problems or concerns shall be addressed. Any staff members or volunteers working directly with the Museum collection shall adhere to written guidelines or instructions provided by the Collections Policy, Museum archivist, or Executive Director.

A. Conservation

- 1) No conservation work done to materials or artifacts shall be irreversible.
- 2) Artifacts shall be protected as much as possible from potentially harmful conditions such as extremes of temperature and humidity, light, dirt, improper handling, fire, water, and pests.
- 3) Artifacts shall be housed and stored in appropriate environments, and accepted archival materials shall be utilized for their care.
- 4) Materials detrimental to the collection shall be restricted from collection areas and exhibitions.
- 5) Restoration shall be performed only by qualified professionals using approved techniques and substances.

X. Policy Approval and Change

Oak Park River Forest Museum Collections Committee, Executive Director, and Board of Directors approved this policy on (date), 2019. The Collections Committee shall periodically review the policy and submit proposed changes to the Executive Director and Board of Directors. Any other suggested changes by staff or volunteers should be submitted in writing to the Collections Committee. No changes may be made without the approval of the Executive Director and Board of Directors.