

**The Springfield Art Association**  
**Collections Management Policy**  
**Revised March 2022**

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## **Purpose**

The purpose of this Collections Management Policy is to guide the management of the Collections of the Springfield Art Association (SAA). This Policy is a public statement of the SAA's commitment to care for and manage its collections properly. It is to be reviewed as needed (at least once every five years) to ensure that it continues to meet the needs of the SAA. All changes and revisions require the approval of the Board of Directors.

## **Mission**

The SAA, a visual arts organization, promotes and supports the advancement of the arts, provides educational opportunities for the greater Springfield area and preserves the historic Edwards Place house and the Collections of the SAA.

## **Responsibility**

The Curator of Collections and Interpretation, hereafter referred to as "Curator", is responsible for the care and maintenance of SAA Collections, hereafter referred to as the Collections. The Edwards Place and Collections Committee will act as the liaison between the Board of Directors and the Curator. The Curator will:

- work with the Edwards Place and Collections Committee to improve and maintain the Collections.
- recommend items to be accepted into the Temporary Holdings and Permanent Collection and to be deaccessioned from the Permanent Collection, in accordance with this Policy.
- accept acquisitions for the Permanent Collection, with approval of the Edwards Place and Collections Committee and in accordance with this Policy.
- make or accept loans, with approval of the Executive Director and the Edwards Place and Collections Committee in accordance with this Policy.
- report biennially on even numbered years to the Board of Directors on the condition of the Collections through a written document.
- be responsible for all the Collections' records.

## **Ownership**

The Collections of the SAA must be legally owned by the SAA, stored according to professional standards, and secured, handled and transported in accordance with professional standards given by the American Alliance of Museums guidelines. Accession and registration policy ensures that all objects acquired by the SAA are legally owned by the SAA and are stored in a known and properly

secured location. The Policy also ensures that the Board of Directors and staff know the volume of objects owned; the type and subject matter; the relationship among the objects; and the relationship of the objects to their Donors. Objects loaned to the SAA are not owned by the SAA.

## **The Collections**

The Collections of the SAA are divided into three categories: Temporary Holdings, Education Collection, and Permanent Collection, which are defined below. All objects donated to or purchased by the SAA, except for expendable non-collection property, must be subject to the acquisition process described below. Expendable non-collection property, such as office and art supplies and equipment, is not covered by this Policy.

### ***Temporary Holdings***

Temporary Holdings consists of objects owned by the SAA that do not fit into the strict intellectual criteria necessary to be included in the Permanent Collection. Objects in Temporary Holdings can be used, sold, traded, or otherwise disposed of so that the proceeds can benefit the care and maintenance of the Permanent Collection.

### ***Education Collection***

The Education Collection consists of objects that may be used and handled for educational purposes, such as during events that interpret the history and context of Edwards Place. Items in the Education Collection receive accession numbers beginning in “E”, so that they may be tracked, yet kept separate from the Permanent Collection (i.e., E2019.01.001). Only new acquisitions post-2018 may be accessioned with this system – items previously in the Permanent Collection shall remain in that Collection.

### ***Permanent Collection***

The Permanent Collection shall consist of objects that:

1. aid in carrying out the SAA’s mission; or
2. support or enhance the historic interpretation of Edwards Place; or
3. were created by faculty, staff, guest artists, or instructors of the SAA; or
4. portray the activities of the SAA throughout its history

Since its incorporation in 1913 as the Springfield Art Study Club, the SAA has acquired a significant Permanent Collection that can be divided into four categories:

1. **The Fine Arts Collection** contains paintings, prints, and sculpture that have been acquired through donations and purchases. In 1915, a Picture Fund Committee was established to raise money for the purchase of paintings. This account was kept separate from the

operating budget and was controlled by the Board of Directors until the account was eliminated in a 1997 financial restructuring. Some gifts of paintings were given by artists in exchange for life memberships to the SAA. This Collection also contains works of art by former SAA instructors and Executive Directors.

2. **The Decorative Arts and Furniture Collection** is comprised of objects that appropriately furnish historic Edwards Place within the period of significance of ca. 1840 to 1886. Objects in this Collection can have a direct association with the Edwards Family, or were present in the house during their tenure, or originated in other Springfield homes of the period, or are appropriate to the period of historic interpretation (up to 1886). Generous donations by the Edwards Family and their descendants provided a foundation for this collection, which has been augmented by donations from prominent Springfield families and purchases. Paintings that have an Edwards Family provenance or that date to the period of interpretation of the house but do not have a direct association with the SAA (i.e., the Fine Arts Collection) are a part of the Decorative Arts and Furniture Collection. Architectural elements from Edwards Place, such as extra doors, hardware, and trim, are included in this Collection. A subset of the Decorative Arts and Furniture Collection is the Pearson Antique Toy Collection, donated by Dr. Emmett Pearson and containing a variety of mostly 20<sup>th</sup> century toys. Much of this collection was deaccessioned, with period appropriate objects remaining in the Collections.
3. **The Condell Collection** was donated to the SAA by Thomas Condell, the grandson of Mr. and Mrs. Benjamin S. Edwards, upon his death. Condell began his lifelong hobby of collecting art and ethnographic artifacts at an early age. This eclectic assemblage includes items from Japan, China, Russia, Egypt, Mexico, India, Europe and North America. African items from the Condell Collection, along with a 1975 donation of 37 pieces of traditional African sculpture and masks, were donated by the SAA to the Illinois State Museum in 2009 so they could be better stewarded and displayed. Much of this collection was deaccessioned and sent to auction, in order to further the Decorative Arts and Furniture Collection. Representative objects remain in the Collections. This collection is non-collecting and or closed to acquisitions.
4. **The SAA Archival Collection** contains documents and other material from the organization's history, including meeting minutes, historical photographs, blueprints, publicity materials and items related to the annual Beaux Arts Ball, including Queens' Crowns.

## Accessions

### *Receipt of Objects*

The Curator and Executive Director will make a preliminary determination as to whether donated object(s) are expendable non-collection property or are potentially appropriate for either Temporary Holdings, Education Collection, or Permanent Collection. If they determine that the object(s) are not appropriate for the SAA's Collections or as expendable non-collection property, the object(s) are immediately returned to the Donor.

The SAA shall not knowingly or willfully accept or acquire an object if:

- The object constitutes a potential hazard to personnel, physical plant or collections; or

- The object's ownership is in dispute; or
- The object requires conservation, storage, or protection beyond the SAA's ability to reasonably provide; or
- The object is a copy or reproduction, unless it is important to the SAA's purposes, can be used for the Education Collection, and/or originals are not otherwise available; or
- The object is known to have been illegally collected contrary to federal law, state law, regulation, treaty, and/or convention, including the UNESCO agreement on cultural property; or
- the SAA's use of the object or the SAA's right to display or not display the object or the SAA's ability to deaccession the object is limited in any way

If the Curator and Executive Director determine that the object(s) may be appropriate for Temporary Holdings, the Education Collection, or the Permanent Collection, the Donor will complete and sign an Object Receipt Form when the object is dropped off. It is SAA policy to maintain a record of all objects entering the SAA as potential gifts. Designed to provide accountability for objects until final determination of acceptance, the Object Receipt Form records the depositor/owner's contact information, a brief description, a brief history or provenance, and the reason for submitting the object. It also stipulates a date by which the SAA will decide on the appropriateness of the object(s) to the Collections. The depositor must be made aware of and agree to the conditions listed on the back of the form. A copy of the completed and signed Object Receipt Form is given to the Donor; the original form and one copy shall accompany the object(s).

During this evaluation period, objects are covered under the SAA's blanket insurance policy.

At its next regularly scheduled meeting, the Edwards Place and Collections Committee will, using the methodology described below, determine whether to accept the object(s) to Temporary Holdings, the Education Collection, the Permanent Collection, or decline the object(s).

If the Committee decides to accept the object(s) to the Temporary Holdings or Education Collection, the Curator or Executive Director will contact the Donor to inform them.

If the Committee decides to accept the object(s) into the Permanent Collection, the Curator or Executive Director will contact the Donor to inform them. The Committee will recommend to the Board of Directors that at its next regularly scheduled meeting, the Board of Directors accession the object(s) into the Permanent Collection. After the Board of Directors approves the accession, the Donor must complete and sign a Deed of Gift Form.

If the SAA declines the object(s), the Curator or Executive Director will contact the Donor to inform them of the decision. The Donor must then pick up the object(s) within 30 days of being contacted unless other arrangements have been made. Unclaimed object(s) that have been left at the SAA for more than 30 days may be retained or discarded at the discretion of the Executive Director and Curator.

The Springfield Art Association will acknowledge all gifts by letter.

For an object(s) returned to its Donor, the original Object Receipt Form must be signed by the Donor to acknowledge the return transfer of object(s). This signed original is to be kept with curatorial records while the donor receives a copy of the form with their signature.

### ***Accepting Objects into Temporary Holdings***

Objects can be accepted into the Temporary Holdings if the Edwards Place and Collections Committee, the Curator, and the Executive Director believe the ultimate disposition of the object can benefit the maintenance of the Permanent Collection. Objects can be decorative art, fine furniture, or fine art. Upon recommendation of the Curator and the Executive Director, the Edwards Place and Collections Committee will consider accepting objects into Temporary Holdings during its next regularly scheduled meeting after the object(s) is left with the SAA. Votes to approve or not approve accession of objects into the Temporary Holdings must be made by a simple majority of voting members at a committee meeting at which a quorum is present. The Board of Directors must be made aware of the acceptance at its next regularly scheduled meeting.

### ***Selling objects from Temporary Holdings***

Objects in the Temporary Holdings can be sold with proceeds benefiting the maintenance of the Permanent Collection. The Edwards Place and Collections Committee must approve by majority vote of members present any selling of objects from the Temporary Holdings. The Board of Directors must be made aware of any sale prior to its occurrence. Members of the Edwards Place and Collections Committee cannot bid on or purchase objects from Temporary Holdings.

Objects can, by majority vote of the Edwards Place and Collections Committee, be transferred to other SAA committees for fundraising or marketing efforts, such as prizes in raffles or as lots in silent auctions. The Board of Directors must be made aware of any such transfer. When objects in the Temporary Holdings are transferred in this manner, those objects are considered no longer in the Temporary Holdings, similarly to when they are sold outside the SAA. When those objects are disposed of by other SAA committees, any proceeds will remain with that committee to do with as it sees fit.

### ***Accessioning Objects into the Permanent Collection***

Upon recommendation of the Curator and the Executive Director, the Edwards Place and Collections Committee will consider the accession of objects into the Permanent Collection during its next regularly scheduled meeting after the object was left with the SAA. Votes to approve or not approve accession of objects into the Permanent Collection must be made by a simple majority of voting members at a committee meeting at which a quorum is present. All recommendations for approval from the Committee to accept objects into the Permanent Collection must be submitted to the Board of Directors for its consideration and vote at its next regularly scheduled meeting. The Board of Directors must consider and vote on any recommendations for accessions to the

Permanent Collection. The Springfield Art Association will acknowledge all gifts by letter as the responsibility of the Curator.

Acquisition into the Permanent Collection will take place after the Curator submits copies of a Justification for Accession to the Permanent Collection Form with a signed Deed of Gift to the Permanent Collection Form or Purchase Form, and any other pertinent document, to the Edwards Place and Collections Committee for approval. While completing the Justification for Accession Form, the Curator will ascertain if there are any copyright interests, trademark rights or other considerations that would limit the use of the object. Acceptance also commits the SAA to the responsibility for the proper care and use of the object.

Objects accessioned into the Permanent Collection should refine the Permanent Collection. The following criteria, appropriate to the object(s) being considered for addition to the Permanent Collection, regardless of their source, are to be weighed:

- Is the object relevant to and consistent with the mission/purposes/goals of the SAA?
- Does the object fill a need or offer a beneficial use (i.e. exhibition, education)?
- Does the object have aesthetic or historical value?
- Can the object assist in the interpretation of Edwards Place?
- Does the object relate to the SAA's collections, history and/or research activities?
- Does accessioning the object bring legal or ethical implications that may create difficulties for the SAA?
- Does the object require conservation, restoration, transportation, storage, protection, or preservation (in keeping with professional museum standards) that is beyond the capacity of the SAA?

However, the SAA may occasionally enter into partial ownership arrangements, life tenures, limited ownerships, or any sharing of title or possession for unique items that will be significant additions to the collection, but only on advice of an attorney and with the express approval of the Board of Directors. Within reasonable limits, the SAA may accept restrictions on how the gift will be acknowledged when it is displayed. Labels within Edwards Place are generally disallowed, except in the Archaeology Room and the SAA History Room.

### *Appraisals*

No member of the SAA staff, Board of Directors, or member of the Edwards Place and Collections Committee, may appraise an object as to its monetary value or give more than a qualified assessment of identity or age. The SAA will not pay an outside appraiser to establish a value on any object being donated to the SAA. In the case of gifts to the SAA, the SAA, when requested, will confine itself to recommending two or more qualified professional appraisers and cooperating with any appraiser the donor selects.

The Curator will not assign a value incoming loans but will depend on the owner to supply value. If the value is unknown, a suitable appraiser shall be retained by the donor.



## Deaccessions

Deaccessioning is the act of permanently removing an object(s) from the Permanent Collection. It is a legal act and carries ethical considerations. Thus, deaccession is a procedure involves the Curator, Edwards Place and Collections Committee, and the Board of Directors. The purpose of deaccessioning is to ensure responsible curation and to refine the collection so it will better fulfill the SAA's mission. Any vote taken to recommend the deaccession of object(s) from the Permanent Collection must be made by a simple majority of voting members at a meeting at which a quorum is present of the Edwards Place and Collections Committee. All recommendations from the Committee to deaccession objects from the Permanent Collection must be submitted to the Board of Directors for its consideration and vote during its next regularly scheduled meeting. The Board of Directors must consider and vote on any recommendations for deaccession from the Permanent Collection.

The SAA will only deaccession objects from its collection for the following reasons:

1. duplication of a better example; or
2. the condition of the object threatens itself or the rest of the collection; or
3. the object is not germane to the collection or to the mission of the SAA; or
4. the SAA cannot care for the object properly; or
5. the authenticity of the object is questionable.

Moneys received from deaccessioning may only be used for purchasing new objects for the Permanent Collection or for the maintenance of the Collections.

Using the Justification for Deaccessioning form, the Curator will recommend that an object be deaccessioned to the Edwards Place and Collections Committee. If approved by simple majority of voting members at a meeting at which a quorum is present, the Committee will make a similar recommendation to the Board of Directors. On their approval, the object will be disposed of. As a courtesy, the donor of the object or their heirs should be contacted and informed of the decision of the SAA.

Objects may be disposed of by a public auction, absolute destruction, or exchange or transfer with another art/historical agency. No object deaccessioned from the Permanent Collection may be conveyed in any manner to a member of the Board of Directors, the SAA staff, or anyone holding a position of trust or honor in the SAA.

The SAA may exchange or transfer objects in its collection as part of the deaccession process. These transfers or exchanges will be with other museums or educational agencies that can properly care for the object. Any object received in exchange must fit the SAA's Collections Policy. The Edwards Place and Collections Committee and Board of Directors, as with any other accession or deaccession, must approve exchanges and transfers.

Computer records shall be flagged to indicate the object has been deaccessioned. Although the object is no longer a part of the Permanent Collection, its object record will be retained and include a photograph, final disposition and use of any funds secured from a sale (if any).

Deaccession applies only to those objects taken into the Permanent Collection and intended to be preserved by the SAA for an undetermined time, because of its enduring value to the SAA. Objects that are loaned to the SAA, in Temporary Holdings or the Education Collection, or otherwise kept by the SAA for social reasons and not accessioned into the Permanent Collection, do not go through this deaccession procedure.

## **Loans**

The purpose of a loan is to enhance the mission of the SAA. Loans from the SAA should extend the SAA's purpose outside the walls. Loans to the SAA should augment the SAA's purpose while increasing the effectiveness of the collection.

The Curator has the authority to recommend that the SAA lend or borrow objects. They will not lend or borrow objects without a properly executed loan form.

The SAA may not accept or grant "permanent loans" or loans for a term longer than three years at a time. All long-term loans must be renewed every three years.

### ***Loans to the SAA***

The SAA will borrow items for exhibit only using a properly executed Loan Agreement. The term of the loan will be one year. If the exhibit extends past one year, the loan may be extended for another year, on a year-to-year basis, but not for more than three years in total. On rare occasions, objects may remain longer than three years, when specifically written into the loan agreement and renewed every three years.

The SAA reserves the right to reproduce photographs of objects or catalog records for publicity purposes only. Works will not be altered in any way for photography.

Loans to the SAA will be confined to those objects for which the SAA can care under the same standards as its own collection.

Prior to formal receipt of the object(s), the Loan Agreement Form must be completed and signed by the owner and the Curator. Upon return of the object, the owner must sign the Loan Agreement Form to acknowledge the return of property and the termination of the loan.

The SAA will handle unclaimed loans according to accepted practice – if the lender cannot be found after searching multiple methods, the loan is considered unclaimed. Unclaimed loans, under Illinois statute citation 765 – 1033/1 to 1033/50, will be held by the SAA for 7 years, and if no person has made a claim in that time, the loaned object becomes the property of SAA. However, ownership is not vested if the undocumented property is determined later to be stolen property or property whose ownership is subject to federal law.

If legal ownership of the object changes during the term of the loan, whether by reason of death, sale, insolvency, gift, or otherwise, it is the responsibility of the new owner and lender to notify the SAA of the change. The new owner may be required to furnish legal proof of the right to the described property.

### *Loans from the SAA*

The SAA will lend objects primarily for exhibition in another museum or to a qualified conservator for conservation. Loans from the SAA will only be made on a properly executed Loan Agreement Form. Loans may be made to other nonprofit educational agencies if the Curator is assured that the object will be cared for and displayed in a manner which meets or exceeds SAA standards. Loans will not be made to commercial entities or individual persons, or those with clear conflict of interest. Loans should have a clear connection to the SAA mission.

The term of a loan from the SAA is one year. For extended loans, the period may be extended for a year on a year-to-year basis but no longer than three years.

The following guidelines shall be followed by borrowing institutions:

- All objects must remain in the condition in which they were received. They shall not be cleaned, retouched, treated, unfitted, remounted, reset, marked, copied, or submitted to any examination or application which would tend to alter their condition except when specifically authorized by the Curator. Tags or identification should not be removed without specific approval by the Curator.
- Damages, regardless of who may be responsible, shall be reported immediately. No action to correct damage is to be undertaken without the SAA's approval. Condition reports should be made before leaving the SAA by the Curator, when arriving at borrower's institution by that institution, before leaving the borrower's institution by that institution, and upon return to the SAA by the Curator.
- The borrower may photograph the object(s) for educational, catalog, record or publicity purposes. Reproduction for sale is expressly forbidden except in the context of an exhibit catalog. Paintings and drawings may not be removed from their frames for photography.
- The borrower will insure the object at the value stated by the SAA. This insurance is to begin when the object(s) leaves the physical possession of the SAA until it is returned. The borrower shall furnish a Certificate of Insurance.
- The cost of insurance, special communications, security provisions, special packing or any other incidental costs created in the loan will be paid by the borrower, unless waived by the Curator.
- When returning borrowed materials, they will be packed in the exact manner as received and, in the case of art objects, with the same cases, packages, pads, wrappings and other furnishings. Any changes or charges must be specifically authorized in advance.
- When on display, all objects borrowed must be credited to the SAA, including any special wording as directed. Reproductions for publicity must also be credited.

## *Permanent Loans and Unknowns*

It is the SAA's policy to resolve any questions concerning permanent loans and objects with unknown sources as soon as possible. After consideration of this list, the Edwards Place and Collections Committee may consult the SAA's attorney and report to the Board of Directors any recommendations they wish to make.

## **Collections Management**

### *Registration of Objects in the Permanent Collection*

The purposes of the registration of the objects in the Permanent Collection are:

- to preserve any associations with historic events, places or persons that an object may have;
- to promote the preservation of the object itself;
- to establish the SAA's right of title to the object;
- to aid in the interpretation of the object;
- to allow the SAA to identify and account for every object in the collection;
- to determine appropriate insurance for the object.

On adoption of this manual the Curator will take immediate steps to see that every object in the Permanent Collection has the following, to the extent possible:

1. An accurate paper Accession File housed in a secure cabinet. The file should include the following:
  - a. The object's unique accession number
  - b. The object's measurements in feet/inches. PastPerfect can convert these into metric.
  - c. The receipt form that provides accountability for objects until final disposition. For those items returned to the depositor, the original copy of the receipt must be signed by the depositor to acknowledge the return transfer of possession and returned to this file.
  - d. In the case of a gift, a valid Deed of Gift form and a copy of the letter acknowledging the gift from the Executive Director and possibly Board of Directors to the donor.
  - e. In the case of a purchase, valid bill of sale and Purchase Form.
  - f. In the case of a bequest, a binding transfer from the estate. Two copies of each form are signed by all parties.
  - g. A Justification of Accession Form.
  - h. Any mutually agreed upon restrictions on how the gift will be acknowledged if and when it is displayed.
  - i. In the case of a loan, a signed copy of the loan form.
  - j. All known documentary information known about the object
2. A unique record in the PastPerfect database that contains enough data in the appropriate fields so that the SAA may easily extract the following information:
  - a. Management data, or data that relate the object and the records to each other
  - b. Descriptive data, or catalogue information; data about the object that can mainly be acquired by examining the object itself, or from simple research techniques.

- c. Historical data that place the object in a historical context with people, places or events.
3. A unique accession number affixed to the object using materials that will not contribute to the deterioration of the object and is removable. The number should be affixed on the back or bottom of the object – somewhere easily accessible for record-keeping purposes, but out of sight to the visitor.

### ***Determining an Object's Accession Number***

Each object in the Permanent Collection will be numbered with a unique three-part Accession Number. The Accession Number will have a control number, which will be the full year of accession (with the exceptions noted below). The second number will be determined as follows: In each year the first accession will be assigned the number 01 (one), the second 02 (two), and continuing in strict sequence to the last accession of the year. The third number will be the catalogue number. The catalogue numbers will begin with 001 (one) for the first object in the accession and continue in strict sequence until all the objects in the accession have been numbered. If there is only one object in the accession, it will be given the catalogue number 001 (one).

For example: 1990.26.003, in which 1990 is the year of accession, 26 is the accession number and is the 26<sup>th</sup> accession in that year, and 003 is the catalogue number and is the third object in the accession.

In the case of the existing collection, the accessions that have known provenance (documentation, oral history) are to be registered with this numbering system. All objects with an unknown provenance existing in the collection at the time of the adoption of this manual are to be given the Accession Number corresponding to the year that they are cataloged.

### ***Nomenclature***

The SAA will follow the system developed by Robert Chenhall, *Revised Nomenclature*, in naming objects in the Permanent Collection and in classifying the catalogue. The PastPerfect database is equipped with a lexicon of nomenclature recommended for use in the museum profession.

### ***Catalogues***

The purpose of the SAA catalogue is to give the SAA easy access to records and to aid the staff in accounting for the permanent collection. The SAA's registration report should be able to produce the following catalogues, either on screen or in written reports:

1. All the records by accession number in numerical order.
2. All the objects alphabetically by title.
3. A nomenclature.

4. All objects by source. The report should be able to show the different types of sources (donor, purchase, bequest, etc.).
5. A priority list of conservation needs.
6. All objects by location.
7. A listing of the value of each object and a total value for the listing, given after donation by the Donor
8. The ability to access records by the object's association

The PastPerfect database software is able to produce all of these reports.

### ***Photography of the Permanent Collection***

The Curator will have every object in the Permanent Collection and all new acquisitions photographed or scanned for identification purposes.

### ***Digital Preservation***

Digital preservation includes actions and tools to ensure the long-term access to content. Digital material is at risk due to a variety of factors including dependency on external software and systems, media failure, and changing file formats. In the Permanent Collection, this concerns digitized materials and records. Whenever possible, digitized materials will be created using file formats conducive to long-term preservation. In some cases, materials may need to be re-digitized for better forms of digital preservation. Digital copies will be kept on the main server of the Springfield Art Association, and analog records should also exist.

### ***Conservation and Storage***

The Curator will biennially, or as needed, prepare a report on the conservation needs of the SAA and present it to the Edwards Place and Collections Committee and the Board of Directors. Because they are closely related, this report may be combined with the biennial collections policy report (page 3). The Curator will, from time to time and as needed, make recommendations to the Executive Director and Board of Directors on the conservation of certain objects. The Edwards Place and Collections Committee, with assistance from the Curator, will report on the condition of the Collection in their annual report.

Each record of an object in the PastPerfect database will be tagged with the condition of Excellent, Good, Fair and Poor. Objects classified as excellent and good will be considered appropriate for exhibit.

Each object will be assigned a permanent location, and the object will be said to “live” at that spot. When objects are moved the new location will be noted in PastPerfect. Objects will also have a

“current location”, which may differ from the permanent location. The current location records items that may be on exhibit or loan and not in the permanent location.

### ***Inventory of the Permanent Collection***

The SAA will inventory the Permanent Collection on a rotating schedule. Each year, a portion of the collection based on Permanent Location will be examined during the period of time when Edwards Place is closed to tours (the winter season). The condition of the object will be noted on a Condition Report form. Records will be updated as needed. A list of items inventoried each year will be created. Computer records will be backed up twice yearly or as needed during an ongoing collections project.

### ***Evaluations of the Permanent Collection***

At the time of accession, the SAA will establish a value for each object in the access. These values will be used to insure the collection and establish a replacement value for loans from the SAA. These values will be updated, if necessary, during the inventory. These values are confidential and are to be revealed only at the discretion of the Curator and Executive Director.

### ***Properties***

The expendable non-collection property of the SAA is not part of this policy or manual. It should be accounted for in a manner recommended by our auditor. Reproductions of authentic objects used in exhibits or demonstrations are properties and should not be accessioned into the Permanent Collection, but rather the Education Collection.

## **Collections Guidelines**

### ***Ethics***

All actions of the Board of Directors and SAA staff should be such that they avoid an apparent as well as an actual conflict of interest with any aspect of the SAA operation and its collection. These actions include the interpretation of SAA and Edwards Place in accordance with the SAA mission and code of ethics.

Personal collecting by the Board of Directors, SAA staff, Edwards Place/Collections committee members, volunteers, and anyone involved with Edwards Place should not compete with SAA and Edwards Place for limited resources or objects. To avoid conflicts of interest when purchasing

objects that may be significant to Edwards Place, there should be an opportunity for the SAA to purchase from that person at the same price the person paid for the item.

Edwards Place is not meant to act as a storage space for personal collections. Objects belonging to those associated with the SAA and Edwards Place may not be stored at said facility – they may be exhibited on loan or donated to SAA.

### ***Protection of Intellectual Assets***

For the purposes of this policy, the intellectual assets of the SAA consist of images of objects and documents in the Permanent Collection, images of Edwards Place historic home, images and content of programs, and physical copies of objects in the Collection. When permission is made to photograph, copy, or otherwise use this intellectual property, permission is limited to a one-time use for specific purposes. A blanket, long-term, or unlimited use of intellectual property may not be granted under any circumstances.

Permission to photograph objects in the gallery must be requested from the Curator. Approval will be determined depending upon the particular display, types of equipment to be used, and intended use of the photographs.

Photographs must be taken in a natural state in Edwards Place. Flash photography may NOT be used. Exceptions may be made with the approval of the Curator or Executive Director.

### ***Access***

Only the Curator and Executive Director will have access to the storage area where the Permanent Collection is located. The Curator or Executive Director must accompany any person into these areas.

The SAA will grant qualified researchers with legitimate research goals equal access to the Collections. The Curator establishes the qualifications of the researcher and the legitimate goals of the project in granting access. Moreover, the Curator may limit access to the object to specified methods of examination and to certain times. The Curator may require a written request, stating which objects are to be examined, the method of examination, and the reasons for the examination.

Procedures for access to the collections and records are:

- Individuals seeking access to the collections and records must seek approval of the Curator by completing a Collections/Records Access Application form. Information is sought on the purpose/need for access and the anticipated significance of the research.
- Objects and records are accessible during normal working hours and only if the visitor is accompanied by an authorized member of the staff.
- All persons granted access will be instructed in the proper procedures.



- Requests for duplication must be submitted in writing to the Curator.

The SAA registration records are not public record but should be considered confidential information. The Curator may provide portions of the registration records to qualified researches, but restrict access to other portions of the records, such as donor, location, and value.

The Curator has the right to restrict or deny access to the collections based on concerns for proper care, handling, and storage of the object in question.

### ***Public Document***

This policy is a public document. A copy shall be kept in the SAA office and made available to any interested person.

### ***Amendments***

This Collections Policy and Manual may be amended by a resolution of the Board of Directors following provisions in the bylaws respecting amendments.

### **Addenda**

Forms referenced in this document:

Object Receipt Form and Object Provenance Questionnaire

Deed of Gift

Justification for Accession

Collections Access Application

Incoming Loan Agreement

Outgoing Loan Agreement

Justification for Deaccession from the Permanent Collection

Condition Report