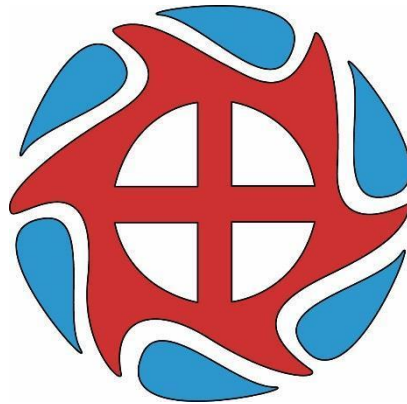


Beloit Historical Society



Collections Management Policy

Board Action	Date	Resolution #	Effective Date
Initial Adoption	02/15/2018	2018-04; 2018-13	02/15/2018
Revision 1	01/13/2021, 02/10/2021	2021.04	3/18/2021
Revision 2			
Revision 3			
Revision 4			
Revision 5			

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I. Historical Background

The Beloit Historical Society (BHS), founded in 1910, is the oldest historical society in Rock County, Wisconsin. The BHS manages two sites—The Lincoln Center and the Hanchett-Bartlett Homestead, a circa 1857 Victorian farmstead. The Hanchett-Bartlett Homestead includes the house and outbuildings, and the Daisy Chapin one-room school house. The Homestead has been listed on the National Register of Historic Places since 1977. The house was built by James Hanchett, a pioneer contractor and builder of dams, who came to Beloit in 1840. He built the first dam across the Rock River at Beloit in 1844. In about 1857 he erected a home of locally quarried limestone for his wife and family. The house, a transitional Greek revival-Italianate style, contains furnishings (from the permanent and education collections) that date between 1850-1885. In 1901, the property was purchased by the Bartlett Family who bequeathed the property to the Beloit Historical Society in 1968 and was originally referred to as the Bartlett Memorial Museum.

From 1910-1954 the Beloit Historical Society occupied the second floor of the Beloit Carnegie Library on West Grand Avenue. In 1954 the Beloit Historical Society moved across the street into the Municipal Center where it occupied the third floor for 14 years. In 1968, the BHS moved into the Hanchett-Bartlett Homestead. In 1990, BHS moved into the recently renovated Lincoln Center, formerly Lincoln Junior High School (1921-1985). The Lincoln Center is currently the administrative center of the society and houses collections, exhibition and public event spaces, the Luebke Family Library, and the Elliott-Perring Sports Hall of Fame.

II. Mission Statement and Purpose of Policy

The mission of the Beloit Historical Society is *sharing Beloit's history to enhance community pride*. The mission was drafted in conjunction with a new strategic plan (2017-2019), which was adopted by the Board of Directors on March 16, 2017.

“A collections management policy is a set of policies that address various aspects of collections management, including acquisition, accession, registration, cataloging, control, security, and storage, as well as the museum’s other collections related activities”.¹ The policy regulates collections-related activities based on collections stewardship standards set forth by professional organizations and clarifies who is responsible for managing the collections. An effective collections management policy makes clear what a museum does to care for, grow, and make accessible its collections to the public it serves. BHS is a non-profit 501c(3) organization and holds its collections in trust for the public. For these reasons, BHS strives to maintain the highest legal, ethical, and professional standards as recommended by the American Alliance of Museums (AAM) and the American Association for State and Local History (AASLH). A collections management policy is a requirement of these standards. The Collections Management Policy was approved by the Board of Directors on February 15, 2018 (Resolution 2018-04; 2018-13).

¹ See Simmons (2006:2).

III. Organization

The Beloit Historical Society, an affiliate of the Wisconsin Historical Society, is administered by a Board of Directors who employ administrative staff to manage the historical society's facilities and programs. BHS recognizes the importance of collections stewardship for the acquisition, care, or exhibition to the public of objects owned by the institution. The BHS Executive Director is responsible for collections management and exhibition practices including the hiring of appropriately trained staff and the training of volunteers to implement collections procedures. The BHS collections committee assumes responsibility and authority for all matters of policy and procedures relating to the BHS collections. "The committee recommends collection related policies for approval by the board and develops the procedures by which the policies are implemented. Such policies and procedures shall include acquisition, registration and accession of new objects, deaccession of objects, and incoming and outgoing loans. The committee shall also assist in planning for all other aspects of collection care, conservation, access, management and use."²

IV. Standards of Conduct and Ethics

Members of the Board of Directors, staff, and volunteers have an obligation to put the Beloit Historical Society's interests above their personal interests. They are expected to act in a way that will benefit the BHS and cannot compete with the BHS for limited resources. Regarding collections, board members, staff, or volunteers of BHS may not:

1. Compete with the BHS in any personal collecting activity.
2. Store their personal collections at the BHS. Storage of non-BHS owned collections puts the BHS in the position of being liable for those collections, raises issues of conflict of interest, and is an inappropriate use of collections care resources.
3. Appraise or authenticate objects that the museum does not own. Internal appraisals may be performed by board members, staff, or volunteers when needed as part of the day-to-day management of the collections (i.e. insurance or outgoing loan). Opinions regarding identification and authenticity of objects not owned by BHS may be offered by board members, staff, or volunteers, but may only be offered verbally. Research services are covered under the Collections Access Policy.

BHS board members, staff, and volunteers must also adhere to the BHS Ethics Policy.³ Board members and staff annually complete a Conflict of Interest form.

V. Scope of Collections

The Beloit Historical Society collects items that relate to local history, specifically the history of the greater Beloit area. The following collections include items that were created in Beloit, reflect the history of Beloit's diverse residents over time, or have a direct and important connection to an event in Beloit history or a prominent Beloit. BHS curates

² BHS By-Laws adopted May 16, 2014 and Amended May 20, 2016.

³ Adopted by the BHS Board of Directors meeting minutes, October 20, 2016.

two types of collections for which collections standards and procedures vary: permanent and education.

A. Permanent Collections

The permanent collections are objects with the highest interpretive and historical value that BHS plans to preserve indefinitely and for which the highest standards of care and processing are implemented. Permanent collections include the artifact, photograph, library, genealogy and manuscript collections. Education collections are objects acquired for educational programs, exhibits, and public access. Education collections are replaceable and are curated to lower standards of care and processing. Education collections include the reference, and hands-on collections.

1. Artifact Collection

The artifact collection includes approximately 11,000 three-dimensional historic objects, including but not limited to furniture, ceramics and glass, industrial machinery, transportation vehicles, textiles and costumes, and paintings and works of art on paper. Artifact collection items are fully cataloged and curated to the highest standards of care BHS is capable of extending.

2. Photograph Collection

The photograph collection includes over 10,000 print, negative, and glass plate images, and film and sound recordings. Photograph collection items are fully cataloged and curated to the highest standards of care BHS is capable of extending.

3. Manuscript and Archives Collection

Manuscripts and archives are for the most part unpublished materials created by individuals, organizations and government. The term *archives* is generally considered to cover collections of records created by organizations, businesses and government while the term *manuscript* covers personal papers, letters, diaries etc. BHS curates large collections of both types of unpublished materials. These primary source documents are fully cataloged and curated to the highest standards of care that BHS is capable of providing. The manuscript collection includes approximately 500 ledgers, scrapbooks, maps, and other archival documents.

4. Library Collection

The Luebke Library consists of nearly 1,000 bound volumes. Library items are non-circulating and may not be removed from the building. Library resources include a complete collection of Beloit High School yearbooks and extensive collections of yearbooks from other public and private schools in the area, city directories and phone books, published histories of local organizations, bound and unbound local newspapers, and some general histories of Wisconsin and Rock County. Additional resources include atlases, plat books, and individual unbound maps including copies of the Sanborn-Perris insurance maps for Beloit. Library collection items are cataloged, but may be handled by the public. Multiple copies (maximum of two) of frequently accessed volumes are maintained.

5. Genealogy Collection

The genealogy collection consists of published and unpublished family histories, genealogies and accompanying copies of charts, correspondence and copies of source

materials related to that research. Cemetery records, clippings of obituaries, marriages and births will also be housed in this collection along with published and unpublished surname indexes to these and other sources. The collection will also include manuals and books on how to do genealogy research.

B. Education Collections

1. Reference Collection

The reference collection is organized by subject (individuals, organizations, buildings, businesses, churches, etc.). These files are a research resource used by BHS staff and volunteers to conduct research at the request of members of the public. These files are accessible to the public through BHS staff and volunteers. The reference collection is not a cataloged collection and cataloged library, manuscript, and archive collections should not be stored with the reference collection.

2. Hands-on Collection

The hands-on collection contains artifacts acquired by BHS specifically for hands-on educational programming. Such items may duplicate items in the permanent artifact collection, be of lesser quality, or lack provenience or provenance information. Because the hands-on collection is currently not a cataloged collection, documentation is maintained in an Education Collection file by the Collections Committee.

C. Collection Records

BHS maintains collections records that document the acquisition, collection history, and use of BHS collections. BHS maintains a catalog card for each artifact, photograph, manuscript, and library item in its collection. Accession records may include correspondence, deeds of gift, photographs, appraisals, or other related documentation. Access to and use of accession records may be restricted as a result of donor restrictions, the inclusion of personal information, or appraisals. Restrictions are determined by the BHS Executive Director / Collections Manager.

VI. Acquisition Policy

Acquisition is the formal transfer of title by means of gift, purchase, bequest, exchange, or conversion. The BHS subscribes to a policy of selective acquisition. Authority to acquire material for the BHS resides with the Collections Committee. In the event the chair of the Collections Committee is vacant, authority to acquire material for BHS resides with the President of the Board of Directors.

A. Permanent Collection Acquisition Criteria

Acquisitions should support the mission of the BHS—*sharing Beloit's history to enhance community pride*—and be of significant historical value to Beloit. The following criteria will guide the acquisition of objects to the BHS.

1. Objects must have free and clear title and must be offered without restriction.
2. Objects must be in stable physical condition and be able to withstand handling for research and exhibition. Exceptions will be made for objects of exceptional historical value.

3. Objects must contribute to the understanding and interpretation of Beloit's history.
4. Objects must have a well-documented collection history that directly relates to the history of Beloit. Exceptions will be made for objects that are exceptional examples of their type or period, convey themes of significant historical value, or could be used to tell powerful stories about Beloit.
5. Objects must not duplicate objects of equal condition or historical value in the BHS collection.
6. BHS resources must be available to register, store, and preserve the objects.
7. BHS will not collect any objects that violate state or federal laws.

B. Orphaned Collections and Conversion of Unclaimed or Old Loans

Acceptable means of acquisition also include adoption of orphaned collections or conversion of unclaimed or old loans. *Orphaned collections*, sometimes referred to as objects found in the collection, are those collections with no catalog numbers (or numbers that cannot be cross-referenced to BHS cataloging systems past or present) or any characteristics that might connect them to existing documentation. Orphaned objects may derive from undocumented door stop donations, undocumented pending gifts, exhibit, special event, or education props, or staff or volunteer personal collections. With orphaned or found in the collections objects, there is no evidence held by the BHS that someone else owns these objects.⁴ *Unclaimed or old loans* are those objects that are accompanied by some evidence or documentation that a loan to the BHS was intended by the owner. Loans of any kind produce a bailment relationship; the owner (bailor), places property in the care of the bailee for a particular purpose and period of time.

Orphaned and old loan collection items may be accessioned into the permanent collection if they meet the acquisition criteria. Orphaned objects must be recorded as found in the collection (BHS refers to found in collection objects as “on hand”) to make clear that the transfer of ownership is undocumented. Old loans must be recorded as “conversion” and must adhere to the guidelines set forth in Wisconsin’s abandoned property statute §171.30-33. An unclaimed or old loan may be converted if the bailment relationship is broken. “Conversion is a legal term meaning unauthorized assumption of ownership of property belonging to another.”⁵

Removal of an undocumented object from a museum’s collection presents risks, despite the fact that the “continued undisturbed possession [of undocumented objects] by the museum usually supports a presumption of valid transfer of ownership,”⁶ with the burden of proof falling on the party disputing this presumption. When considering the disposal of objects of unconfirmed ownership, the BHS will consider additional factors such as the value, distinctiveness, history of exhibition, and proposed disposal method of the object(s) in question.

⁴ See Malaro (2012:319 and 394-395) and Found in Collections: A Reference Guide for Reconciling Undocumented Objects in Historical Museums. <http://www.foundincollections.com/>. Accessed 2/2/2021

⁵ See Malaro (2012:322).

⁶ See Malaro (2012:319).

C. Temporary Registration

Objects under consideration for acquisition may enter the BHS only after a Temporary Receipt has been completed. The BHS will notify the owner of property deposited under a Temporary Receipt concerning the Collections Committee's decision within 30 days of the receipt date. If the BHS decides not to accept the object(s), the owner has 30 days from the date of notification to reclaim the object(s). Unclaimed objects will become the property of the BHS as per the guidelines set forth in Wisconsin's abandoned property statute §171.30-33.

VII. Accession Policy

Accession is the act of making an object or collection of objects part of the permanent collection. Accession also refers to a collection of objects entered into the permanent collection at the same time. Acquisitions may only be approved for accession by the Collections Committee.

A. Collections Committee

The Collections Committee shall be responsible for all matters of policy and procedure relating to the collections of the Beloit Historical Society. The committee recommends collection related policies for approval by the board and develops the procedures by which the policies are implemented. Such policies and procedures shall include acquisition, registration and accession of new objects, deaccession of objects, and incoming and outgoing loans. The committee shall also assist in planning for all other aspects of collection care, conservation, access, management and use.⁷

The Executive Director serves as chair of the Collections Committee. In the absence of the Executive Director, the President of the Board of Directors will appoint a replacement. The Committee shall consist of at least four members, three of which must be BHS board members. The Committee:

1. Recommends collections related policy for approval by the board.
2. Develops the procedures by which the policies are implemented.
3. Reviews proposed acquisitions and approves accessions into the collections.
4. Reviews proposed deaccessions from the collections and recommends disposition and use of proceeds from the sale of collections.
5. Presents proposed deaccessions to the board for approval.
6. Approves the loan form and terms of loans.
7. Acts as an advocate for the resources necessary to meet professional standards for the care and management of the collections.
8. Assists in the development of plans to improve collections care and access to collections.

Collections committee proceedings are recorded via minutes. Minutes document accession decisions and specify which collection pending accessions were accessioned into (artifact,

⁷ Beloit Historical Society Bylaws, amended 5/16/16.
http://www.beloithistoricalsociety.com/bylaws_2016.php. Accessed 12/28/17.

photograph, manuscript, library, hands-on, or reference collection). Collections Committee minutes and agendas are kept on file and stored electronically via Google Drive. A brief report of Collections Committee activities is presented by the Chair of the Collections Committee at each Board of Directors meeting.

VIII. Deaccession Policy

Deaccessioning is the act of permanently removing an object from the collection. Deaccessioning is a management tool and an aspect of responsible growth and refinement of the collections, but is also one of the most controversial practices in museums. Deaccessioning presents legal and ethical considerations, which BHS will endeavor to address with full transparency. Legal implications include donor restrictions, tax implications, and clear ownership of deaccessioned objects. Ethical considerations include public expectations of curation in perpetuity and use of deaccession proceeds. Authority to deaccession from the BHS collection rests with the Board of Directors (BOD). The Collections Committee makes recommendations and compiles deaccession proposals for review by the BOD.

A. Deaccession Criteria

Deaccession decisions should be of benefit to BHS and be in keeping with public-trust responsibilities. The following criteria will guide deaccession recommendations and decisions:

1. Inconsistent with the BHS mission and scope of collections.
2. Condition renders the object valueless for purposes of research, public education, and exhibition or presents hazardous conditions.
3. Duplicate or of inferior quality to another identical or similar objects or collections in the BHS collection.
4. Cannot be adequately stored or cared for.
5. Lacks authenticity or proper documentation, rendering it valueless for purposes of research, public education, and exhibition.
6. BHS has clear and unrestricted title. (See Orphaned Collections and the Conversion of Unclaimed or Old Loans for policy regarding acquiring title to abandoned or undocumented property.)

BHS will adhere to the standard minimum time period between accessioning and deaccessioning of three years.⁸ Once deaccessioned, accession numbers shall not be re-used as these numbers are part of the collection's permanent records. BHS shall also retain all documentation for deaccessioned collections as part of its collections records. Missing or stolen objects shall not be deaccessioned from the collection.

BHS may, but is not required to, notify a donor or the donor's heirs about deaccessions. If the deaccession is of high monetary value or the proposed methods of disposal has the potential cause distress to a donor or donor's heirs, the Board of Directors may decide to notify the donor or donor's heirs.

⁸ See Simmons (2006:53) and IRS 8283.

B. Methods of Disposal and Use of Deaccession Proceeds

Disposal is the process of getting rid of an object that has been deaccessioned.

Deaccessioned objects will be disposed of by one of the following methods (the disposal methods are ranked in order of priority, 1 being the most desired and 4 being the least):

1. Transfer deaccessioned objects to the BHS Hands-on Collection.
2. Donate, exchange, or transfer to another museum or educational institution.
3. Sell deaccessioned objects to another institution or at public auction. In the event of such sale, to avoid the appearance of conflict of interest, BHS board members, staff, and volunteers are not eligible to bid on deaccessioned objects.
4. Destruction or disposal.

Proceeds realized from the sale of deaccessioned objects will be placed in the BHS Curatorial Fund and may only be used for the purchase of new acquisitions and direct care of collections. (See Statement on Direct Care of Collections.)

C. Curatorial Fund

The BHS maintains a restricted Curatorial Fund established with funds from the sale of deaccessioned collection items. This fund is not to be recognized as revenue, nor will donations of works of art, historical objects, and similar items be capitalized or considered to be financial assets if the donated items meet the following criteria:

“a. They are held for public exhibition, education, or research in furtherance of public service rather than financial gain.

b. They are protected, kept unencumbered, cared for and preserved.

c. They are subject to an organizational policy that requires the use of proceeds from items that are sold to be for the acquisition of new collection items, the direct care of existing collections, or both.”⁹

Board members, staff, and volunteers may propose the purchase of new collections items using the Curatorial Fund. Proposals are reviewed and approved by the Collections Committee. In addition, the Collections Committee may annually request funds from the Curatorial Fund to support collections care projects and the purchase of archival supplies. Use of this fund is strictly dictated by the Statement on Direct Care of Collections.

D. Statement on Direct Care of Collections

Proceeds from the sale of deaccessioned Beloit Historical Society collection items are kept in a segregated restricted account¹⁰ and can only be used for new acquisitions and direct care of collections. The BHS adheres to the ethical principles and definition of direct care established by the American Alliance of Museums,¹¹ as well as access and interpretation as stated by AASLH in their Statement of Standards and Ethics,¹² and their Valuing History Collections Paper¹³ Direct care entails actions that “invest in the existing collections by

⁹ The Financial Accounting Standards Board (FASB) updated Topic 958, Definition of Collections, March 2019.

¹⁰ Curatorial Fund.

¹¹ White paper, Direct Care of Collections: Ethics, Guidelines and Recommendations. April 2016, updated March 2019. American Alliance of Museums.

¹² AASLH Statement of Standards and Ethics. Revised 2018.

¹³ AASLH Valuing History Collections position paper. Adopted May 2020

enhancing their life, usefulness or quality and thereby ensuring they will continue to benefit the public”.¹⁴

BHS defines direct care actions as those physically in contact with the collection material in order to increase longevity of the item and actions that enhance the usefulness of the material to benefit the public through digital or in-person access.

Preservation activities gain meaning through access to the collections. BHS is dedicated to “providing and promoting equitable access [by the public] to historical resources through exhibition, tours, educational programs, publications, electronic media, and research is critical in fulfilling the public trust and mission of history organizations”¹⁵. (See IX. b. Physical and Intellectual Accessibility). Methods of access will be determined based on the physical limitations of the historic collections.

Direct care does include the following activities:

1. Conservation services (limited to treatment, stabilization, and restoration by a conservation professional).
2. Environmental monitoring equipment and supplies (limited to dataloggers, light meters, UV filters and bulbs for storage and exhibit lighting, and integrated pest management supplies).
3. Archival supplies (limited to supplies used for the storage of collections).
4. Storage hardware (cabinetry, shelving, etc.).
5. Treatment (preservation, rehabilitation, restoration, or reconstruction)¹⁶ of an interpreted historic structure identified by means of a historic structures report.
6. Collections care investments identified through a conservation assessment and/or plan.
7. Collections care training for staff and volunteers.
8. Maintenance of and upgrades to the PastPerfect collections management software system.
9. Cost-share or match on grant proposals that address these criteria.

Direct care does not include the following activities:

1. Staff salaries and intern stipends for individuals whose responsibilities include collections care and management.
2. Facilities maintenance, upgrades, security, and fire suppression systems that impact the preservation of and accessibility to collections (includes furnace, roof repair, etc.).
3. Institution-wide pest management contracts.
4. Exhibition casework, mounts, or lighting fixtures.

¹⁴ White paper, Direct Care of Collections: Ethics, Guidelines and Recommendations. April 2016, updated March 2019. American Alliance of Museums.

¹⁵ AASLH Statement of Standards and Ethics. Revised 2018.

¹⁶ Preservation focuses on the maintenance and repair of existing historic materials and retention of a property's form as it has evolved over time; rehabilitation acknowledges the need to alter or add to a historic property to meet continuing or changing uses while retaining the property's historic character; restoration depicts a property at a particular period of time in its history, while removing evidence of other periods; reconstruction re-creates vanished or non-surviving portions of a property for interpretive purposes. Source: <https://www.nps.gov/tps/standards/four-treatments/treatment-guidelines.pdf>. Accessed 10/10/16.

5. Computer hardware related to PastPerfect collections management software system.
6. Hardware related to digitization (digital cameras, scanners, etc.).
7. Fund-raising and grant-writing expenditures related to collections care and management.

The BHS recognizes that the above criteria are not all inclusive and that alternative interpretations of “direct care” exist. Scenarios that fall outside of these criteria shall be considered and decisions made by the collections committee with reference to the Guiding Questions outlined in the AAM white paper on direct care (2019:11). These questions are as follows:

1. Will this investment enhance the life, usefulness or quality of an object(s)?
2. Is this a strategic decision based, for example, on an institutional plan, a collections care plan or conservation assessment?
3. Will the expenditure have a physical impact on an item(s) in the collections?
4. Will this investment improve the physical condition of an item(s) in the collections rather than benefit the operation of the entire museum?
5. Is this decision being made without pressure resulting from financial distress at the museum or parent organization?
6. Is this a cost that is not normally considered part of the museum’s operating budget?
7. Can this decision be clearly explained to the museum’s stakeholders and the public?

IX. Collections Stewardship

Collections stewardship is the careful, sound, and responsible management of that which is entrusted to a museum’s care. Beloit Historical Society recognizes that its most important and irreplaceable resource is its collection. To fulfill its collections stewardship responsibilities the BHS strives to: (1) own collections that are appropriate to its mission, (2) adhere to legal and ethical standards regarding care and management of its collections, (3) strategically plan for the use and development of its collections, and (4) provide public access to its collections.¹⁷

A. Conservation Assessment

In May 2016 BHS completed the essential first step to improving collections stewardship. A conservation assessment of the Lincoln Center and Hanchett-Bartlett Homestead was completed by a professional objects conservator. The final report outlined immediate, short-term, and long-term needs and informed the BHS’s strategic plan as it relates to collections care and access.

Future Collection Assessments will be conducted when the recommendations of the current assessment have been addressed in order to determine if new issues have arisen and that the collections work is following standards as outlined in this policy.

¹⁷ See American Alliance of Museums, Characteristics of Excellence for U.S. Museums, Collections Stewardship. <https://aam-us.org/docs/continuum/characteristics-of-excellence.pdf>. Accessed online 1/5/18.

B. Physical and Intellectual Accessibility

Physical and intellectual accessibility are vital to ensuring BHS is able to fulfill its collections stewardship responsibilities. Physical accessibility entails preservation quality storage equipment, environmental controls, and use of archival materials to house and organize collections. Intellectual accessibility is achieved through maintenance of proper documentation, cataloging, use of a collections management software system, and digitization. The conservation assessment report laid out a course of action to improve physical and intellectual control, but these steps must be completed incrementally due to the availability of resources.

C. Inventory

“An inventory should reflect the current status of the collection.”¹⁸ An accurate inventory is important to know and understand what is in the collection, where it is located, why it is a part of the collection, and to detect issues in order to resolve them in a timely fashion. A wall-to-wall comprehensive inventory is to be conducted by BHS staff, trained interns and volunteers every ten years.

As of 2021, the BHS collections are not fully inventoried. Storage rooms at the Lincoln Center include the textile storage room, library, manuscript storage, military storage, and Adam’s Collection Room (ARC). A comprehensive inventory of the textile storage room was completed in August 2017. However, all other storage areas at the Lincoln Center have not been inventoried. Inventory of the Hanchett-Bartlett Homestead is incomplete. As of January 2018, the entire upstairs of the Homestead is inventoried, but the first floor kitchen, pantry, and music room have not been inventoried. The school house and barn have not been inventoried. A comprehensive inventory will be completed in the next five years (by 2026) to create a baseline for future inventories.

Partial inventories will take place on a regular basis to maintain the accuracy of the comprehensive inventory. Partial inventories can take place during the planning of an exhibition, a rehousing or scanning project or is defined by material type or storage location.

To maintain accuracy of the inventory, all change of locations will be documented as to when, for what purpose, and by whom with the use of a location change form.

X. Collections Access Policy

The purpose of the collections access policy is to provide prospective research visitors the information and guidelines needed to access BHS collections for personal or scholarly study or for commercial use. The policy provides information about how to request access, access guidelines, copyright restrictions, and fees and services.

The Beloit Historical Society (BHS) owns, curates, and provides access to collections and records related to the history of the greater Beloit area. This policy covers access to and use of collections and records owned by BHS. BHS endeavors to provide public access unless there is a federal law, a state statute, a BHS need, or a privacy concern that would restrict access. Access to and use of collections and/or information may be restricted as a

¹⁸ Simmons, John and Toni Kiser (ed.), 2020:341, Museum Registration Methods.

result of copyright, donor restrictions, or condition (some items may be too fragile to handle).

BHS members and members of the public are allowed physical and intellectual access to collections and primary and secondary records. However, fees apply for non-member's access to the Luebke Library and for duplication requests of photographs, documents, or records. All users must adhere to the access guidelines. Commercial use of photographs or documents require additional fees and contractual agreements. If a user is unable to visit BHS, historical research assistance is available for a fee.

A. Research Requests

Research requests can be made to the BHS in person, online, or by mail. All research requests require the completion of a Research Request Form. The BHS uses the form to track research questions and answers, time spent handling research requests, and the number of individuals served. The form is available onsite or may be downloaded from the website and mailed to or delivered to the BHS in person. The form may also be completed online. Once submitted, the form is automatically emailed to info@beloithistory.org.

To request a Research Request Form or the Collection Access Policy requestors can email info@beloithistory.org. Requestors may also call (608) 365-7835. To facilitate a timely and accurate response, the entire Research Request Form should be completed to provide as much detail about the research question as possible. Written requests must include the Research Request Form and should be mailed to the address on the first page of this policy. Responses to any written research inquiry may take up to three to four weeks.

Since BHS relies on volunteers to assist researchers, the Luebke Library is available by appointment. It is best to call or email BHS in advance to schedule a time to visit. If a requestor completes the Research Request Form in advance BHS will make every effort to have relevant materials ready by the time of a scheduled arrival.

B. Access Guidelines

Because collections are frequently fragile, irreplaceable, and often require special handling, access guidelines are necessary to ensure the preservation and safety of all BHS collections. Rules and access guidelines will be provided to and signed by each patron. Specific guidelines can be updated by the Executive Director and/or the Collections Committee Chair as required by changing needs of the collection.

C. Copyright Restrictions

The copyright law of the United States (Title 17, U.S. Code) governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish photocopies or other reproductions. One of these specified conditions is that the photocopy or reproduction is not to be "used for any purpose other than private study, scholarship, or research." If a researcher makes a request for, or later uses a photocopy or reproduction for purposes in excess of this "fair use" that researcher may be liable for copyright infringement and will hold BHS harmless.

The BHS does not claim exclusive ownership of copyrights and has not determined copyright status for many materials in its collections. The Beloit Historical Society is not responsible for determining copyright status or securing copyright permission.

D. Fees and Services

Because the BHS is a largely volunteer-run non-profit organization, earned income from photocopy, scanning, and research services help sustain operations. Fees are based on cost recovery with a modest increase to support the preservation and maintenance of BHS collections.

BHS reserves the right to refuse a request for copies or scans if these activities would risk damage to the item(s). In addition, BHS reserves the right to refuse a duplication order if the order may involve violation of copyright law.

Images on the BHS website may be printed or downloaded by individuals, schools or libraries for personal use, study, research and classroom teaching without permission.

A fee schedule will be reviewed and updated annually by the board of directors as part of the budget development process.

XI. Loan Policy

BHS facilitates outgoing and incoming loans to disseminate knowledge, share information, and broaden public access. BHS makes loans to recognized museums or educational, cultural, or scientific institutions. BHS does not make outgoing loans to individuals. Outgoing and incoming loans should benefit public, not private interests. BHS will not engage in permanent loans. Permanent loans are loans of indefinite duration. By definition, a loan is a temporary arrangement of finite duration.

A. Outgoing Loans

Loan requests must be received in writing at least three months prior to the intended arrival at the loan venue and should be received from an individual authorized to request loans on behalf of their institution. Formal loan requests must include the intended purpose, location, and proposed dates. If the loan is for exhibition purposes, an exhibit prospectus, standard facility report, and certificate of insurance for all venues may be required.

The Collections Committee approves the loan form and terms. Loan requests are approved by the Executive Director, who will keep the Collections Committee informed on all loan transactions. Collections requested for loan must be suitable to the reason for the loan and able to withstand packing, shipping, handling, and purposes for which the loan is made. Availability of objects for loan is subject to the condition of the object, copyright laws, and cultural restrictions. Special permits may be required and are the responsibility of the borrowing institution. The condition of all artifacts will be photographically documented before pick up and after return of the loan. Each borrower will agree to the loan conditions prior to a loan being approved.

B. Incoming Loan

The BHS takes on a liability when agreeing to the conditions of an incoming loan request. For this reason, incoming loans should demonstrate a clear connection between the borrowed object(s) and the BHS mission. Incoming loans from private collectors or for-profit entities can present conflicts of interest and must be carefully assessed.

C. Personal Objects Brought Into the Museum

If personal objects owned by BHS board members, staff, or volunteers are necessary for special exhibitions or public events, they may be brought in under an incoming loan agreement and may be temporarily stored in collection storage areas. The BHS will only insure those personal collection objects that are brought in for a special exhibit or public event that are covered by an incoming loan agreement. BHS will not insure personal objects brought in for office or event decoration.

D. Incoming Loan Conditions

1. The BHS may use the lending institution's loan form if appropriate.
2. The BHS will only borrow objects for which the lender has clear title. It's the lender's responsibility to inform BHS of any changes of ownership during the tenure of the loan.
3. The BHS will adhere to the conditions set forth by the lender, but will be transparent about collection stewardship limitations.
4. In lieu of lender loan conditions or a loan agreement, the BHS will endeavor to adhere to the conditions outlined in Outgoing Loan Conditions when acting as the borrower, but will be transparent about collection stewardship limitations.

XII. Insurance Policy

Few museums can afford insurance for the full market value of all their collections. BHS is no different and for this reason, maintains a replacement insurance policy. Replacement cost is the cost of replacing property without considering depreciation. Ideally, this policy is accompanied by a full inventory and photo documentation of all objects owned by BHS. Inventory is underway, but incomplete. Authority to negotiate and purchase insurance rests with the Board of Directors.

XIII. References Cited

American Alliance of Museums (updated 2019) White paper, *Direct Care of Collections: Ethics, Guidelines and Recommendations*.

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The Financial Accounting Standards Board (FASB) updated Topic 958, Definition of Collections, March 2019.

Malaro, Marie C. and Ildiko Pogány DeAngelis (2012) *A Legal Primer on Managing Museum Collections*. Third Edition. Smithsonian Books.

Simmons, John E. (2006) *Things Great and Small, Collections Management Policies*. American Association of Museums.

Simmons, John and Toni Kiser (ed.), (2020), *Museum Registration Methods*.

XIV. Glossary of Terms¹⁹

Acquisition – the appropriately documented transfer of title to the BHS of an object or objects acquired by purchase, gift, bequest, exchange or any other method that transfers title to the BHS.

Accession – the formal acceptance of an object or group of objects acquired by the BHS as part of its permanent collection.

Archives – collections of records created by organizations, businesses, and government.

Collections – artifacts, archives, manuscripts, photographs, and library books owned and cared for by the BHS.

Collections policy – set of policies that governs what a museum does to care for and grow its collections and make them available to the public and a. addresses key aspects of collections management including scope of collections, acquisitions, accessions, deaccessions and disposal, documentation, collections care, loans, access and utilization of collections, security, insurance, and legal issues.

Collections procedures – directions or methodology for how to accomplish collections management activities such as cataloging, marking objects with catalogue numbers, and documentation systems. Procedures are the mechanism by which policy is implemented.

Collections stewardship – the careful, sound, and responsible management of that which is entrusted to a museum's care.

Conversion – a legal term meaning unauthorized assumption of ownership of property belonging to another.

Deaccession – the formal removal of an object or group of objects accessioned into the BHS permanent collections.

Disposal – the process of physically removing an object that has been deaccessioned.

Inventory – the process of physically locating objects for which the BHS is responsible and reconciling location data with previous records.

Manuscript – primary source collections of personal papers, letters, and diaries, etc.

Orphaned collections or objects found in the collection – those collections with no catalog numbers (or numbers that cannot be cross-referenced to BHS cataloging systems past or present) or any characteristics that might connect them to existing documentation.

Public trust – the principle that certain natural and cultural resources are preserved for public use (i.e. in trust). The BHS holds its collections in public trust and must protect and maintain these resources for the public's use.

Unclaimed or old loans – those objects that are accompanied by some evidence or documentation that a loan to the BHS was intended by the owner.

¹⁹ Many definitions derive in part from *Museum Wise: Workplace Words Defined* (Cato 2003).