South Wood County Historical Corporation Collections Management Policy

Part I. Introduction

The South Wood County Historical Corporation Collections Management Policy establishes policies and guidelines for the acquisition, deaccession, loan, care, management, and use of the South Wood County Historical Corporation collections. This policy shall not replace any other policies or regulations under which the South Wood County Historical Corporation is legally or ethically bound to operate¹. The South Wood County Historical Corporation is a 501(c)3 non-profit organization. The mission of the South Wood County Historical Corporation is: The South Wood County Historical Corporation is a non-profit making permanent institution in the service of the community, which acquires, conserves, researches, communicates, and exhibits for purposes of study, education, and enjoyment; the material evidence of the people and environment in South Wood County, Wisconsin.

The South Wood County Historical Corporation was founded in 1955 in Wisconsin Rapids, Wisconsin. A group of individuals came together to preserve, record, and share South Wood County history in the lead-up to Wood County's Centennial Celebrations. Initially, monthly meetings were held in various locations throughout the community to discuss specific topics and host educational programs. Any items of local interest were donated to the South Wood County Historical Corporation and held in various Board of Directors' private homes until 1970, when the former Witter family home and T.B. Scott Public Library became available and were donated to the South Wood County Historical Corporation. Since 1972, the South Wood County Historical Corporation has used the South Wood County Historical Museum as a host for permanent and traveling exhibits, presentations, and events to be enjoyed by citizens and visitors alike.

The Board of Directors is responsible for the museum's overall administration and curatorial management. Accessioned collections are insured under Spectrum Insurance Group in Wisconsin Rapids.

Standard of Conduct and Ethics

All museum Board of Directors, staff, and volunteers must adhere to the Code of Ethics established by the American Alliance of Museums (AAM) and the Statement of Professional Standards and Ethics adopted by the American Association of State and Local History (AASLH)².

Part II. Purpose and Scope of Collections

The South Wood County Historical Corporation collects objects that fall within the museum's mission statement, that is, items pertaining to The South Wood County, Wisconsin area and includes, but is not limited to:

- Artifacts associated with South Wood County history.
- Photographs relating to South Wood County history.
- Archival material relating to South Wood County history, including, but not limited to:
 - Letters, diaries, scrapbooks
 - Original documents
 - Postcards
 - Documents relating to local businesses, organizations, clubs, families, and towns within South Wood County.
 - Blueprints/Architectural Drawings

Please refer to the	bylaws.
² AAM Code of Ethics (http://aan	-us.org/resources/ethics-standards-and-best-practices/code-of-ethics)
and AASLH Statement of Standa	ds and Ethics:
(http://download.aaslh.org/AASL	H+Statement+of+Standards+and+Ethics+-+Revised+2018.pdf)

The South Wood County Historical Corporation collects items for the purposes of preserving and interpreting the history of this region. The South Wood County Historical Corporation also makes materials available for research and public outreach, and curates these materials in trust for future generations. Researchers are encouraged to examine items on the museum premises. Records and photographs may be made with permission from the Curator.

Part III. Acquisitions & Accessioning

DEFINITION: "Accessioning" is the process of creating a permanent record of an object, assemblage, or lot received from one source at one time for which the museum has custody, right, or title, and assigning a unique control number to said object, assembly, or lot.

A. ACQUISITION CRITERIA

Objects accepted and accessioned into the collections must support the mission of the South Wood County Historical Corporation. The following criteria must be met before the museum will acquire and accession an object into the collection:

- The object is consistent with the collecting goals of the museum.
- The object is significant to the collection's scope and is not already duplicated in excess.
- The museum can provide proper care, conservation, storage, and security under conditions
 ensuring the object's preservation and accessibility, concerning professional standards and the
 museum's financial ability for collections care.
- The object does not represent an unacceptable hazard to personnel or other collections.
- Acceptance of the object will not result in undue expenses for the museum.
- The museum intends to retain the object for the foreseeable future.
- The object is free of donor restrictions.
- The provenance of the object is documented in associated records.
- The title of the item is free and clear.
- The object was collected and received in full compliance with all federal, state, and local laws and regulations.

The South Wood County Historical Corporation does not collect the following:

- Objects that fall outside the scope of collections.
- Objects with no associated documentation, especially those of unknown historical origin.
 Exceptions may be made if such documentation can be readily or likely obtained and/or the object possesses intrinsic research or educational value.
- Objects that have been obtained illegally and/or objects for which the museum cannot establish a clear title of ownership.
- Objects with pre-existing conditions, unless approved before accession by the board of directors.

B. RESPONSIBLE PARTIES

- The Curator/Archivist will approve all objects for acquisition.
- The Curator/Archivist is responsible for creating and maintaining complete, written documentation of the process for each acquisition in a timely manner.

C. ACQUSITION METHODS

The museum may acquire objects by gift, bequest, exchange, or any other appropriate means in which the title and possession of the object pass to the museum, and the Curator/Archivist approves.

D. ACCESSION PROCEDURE

All items accepted into the museum must be documented in writing by a deed of gift form, including particulars of the transaction such as the date of the gift, the donor's address and contact information, and a specific description of the donation. Except in rare circumstances deemed appropriate by a majority vote of the board, the museum does not accept objects with donor restriction(s) regarding the use, loan, exhibition, storage, or future disposal of the object(s). The donor will transfer title and possession to the museum, which will be documented by completing a deed of gift form.

- If any restrictions are placed on the object(s), these will be stated on the deed of gift, and the Curator/Archivist will carefully consider the restriction(s) before any acquisition takes place.
- In the case of a bequest, a copy of the appropriate portion of the will or similar document must accompany the bequest by the estate's attorney or representative. The museum reserves the right not to accept a bequest if the above acquisition criteria cannot be met.
- The museum will assume ownership of an object already in collections if no confirming documentation can be located if it has been ten years or more since the object has been at the museum, and if all attempts to reconcile ownership have been exhausted.
- All accessions will be completed in a timely manner. Along with the deed of gift, Curator/Archivist will follow these steps in accessioning an object:
 - Complete a Deed of Gift, Accession and Catalog Records. An acknowledgment letter signed by the Curator/Archivist should be sent to the donor for their donation.
 - Enter the accession into the museum catalog.
 - Label and photograph the item.
 - o Identify an appropriate storage location for the object.

All documentation, including any letters and other forms of communication that may also establish title and possession, will be kept in object files. Copies of all deed of gift forms should be filed alphabetically according to the donor's name. All object files should be stored in a fire-resistant cabinet and/or a complete set of copies of all forms should be stored off-site. Electronic copies of forms should also be kept. The Curator/Archivist is responsible for overseeing that all necessary documentation has been obtained and recorded, and for maintaining such records.

E. APPRAISALS

An appraisal is a professional opinion on the market value of an item. The museum will not appraise objects donated or exchanged. It is the donor's responsibility to obtain an accurate value on a gift for tax purposes. Museum staff, volunteers, and members of the board of directors will not offer legal or tax advice to donors or potential donors regarding the tax or other legal implications of their donations. The Curator/Archivist will inform the donor that it is the donor's responsibility to seek independent advice from a qualified tax specialist or attorney. Any person requesting an appraisal should be instructed to locate appraisal expertise through telephone directories, galleries, publications, or other means that list market values for similar items. The Curator/Archivist may assign values to museum collection objects for insurance purposes and no other reason.

The museum will not accept any donations believed to be improperly represented in terms of legal ownership, authenticity, condition, or value until a competent, independent authority has substantiated the original claim or until the attribution or value has been changed to reflect the true character of the items offered for donation.

Part IV. Deaccessions

DEFINITIONS: "Deaccessioning" is the process used to permanently remove an object from the museum's collection or document the reasons for an involuntary removal (one required by law or due to circumstances not controlled by the museum). "Disposal" is the official mode of transfer.

Accessioned objects may be held in perpetuity as long as they:

- Support the museum's mission statement.
- Retain physical integrity, identity, and authenticity.
- Can be properly stored, preserved, and used.

A. PURPOSE OF DEACCESSIONING

Deaccessioning, when carried out in an appropriate manner and with thoughtful consideration, is an integral part of responsible collections management. The South Wood County Historical Corporation board of directors endorses this view based on the ethical codes of national and international museum professional organizations.

B. RESPONSIBLE PARTIES

The Curator/Archivist has the authority to deaccession museum objects. Prior to disposing of accessioned items, the method (s) of disposal must be agreed upon. A record of deaccessioning must be kept, identifying the reason for and method of disposal.

C. DEACCESSIONING CRITERIA

Objects may be considered for deaccessioning under one or more of the following circumstances:

- The item does not fall within the scope of South Wood County Historical Museum's stated mission.
- The item is a duplicate of a better or equal quality item.
- The item has inadequate documentation, or the absence of available documentation critically reduces the historical value or significance of the object.
- The object cannot be preserved, is damaged, or has deteriorated to the point that it is no longer helpful to the museum.
- The object represents an unacceptable hazard to personnel or other collections.
- The museum lacks the ability to give the item proper care.

D. DISPOSAL METHODS

Disposal of collections is solely for the advancement of the museum's mission. Any object that has been selected and approved by the Curator/Archivist for deaccessioning should be transferred or disposed of as follows:

- Transfer to another appropriate institution. Consideration will be given to placing the object in educational institutions in the region.
- Exchange or Donation. Depending on the nature of the items, museums or educational institutions should be contacted regarding their suitability for exchange or donation. South Wood County Historical Corporation may donate items to another institution, such as another museum or library, whose mission better serves to care for the object.
- Sale. An item may be sold privately or at a public sale or auction. The proceeds must be used directly to care for the collections or future acquisitions.
- Destruction. If the object cannot be disposed of in any of the above manners, it shall be
 destroyed. Destruction is defined as the obliteration of an object or specimen by physical or
 mechanical means. The South Wood County Historical Corporation board of directors or
 affiliated parties may not retain any remains of the object. Prior to destruction, the object will
 be evaluated to ascertain whether it contains any hazardous materials. If any hazardous
 materials exist, the object will be destroyed in accordance with all federal or state laws and/or
 environmental health and safety procedures. This disposal method must be both documented
 and witnessed.

Deaccessioned objects will not be given, exchanged, or sold privately to museum employees, members of the governing authorities or their representatives, members of museum support groups, or volunteers.

E. DEACCESSION AND DISPOSAL PROCEDURES

The Curator/Archivist will identify an object for deaccession/disposal based on the criteria above and ensure all legal and ethical considerations of deaccessioning the proposed object(s) are considered. The museum must hold a free and clear title to the object. There must also be no restrictions placed on the use of the object (e.g., copyright, donor-imposed restriction, etc.). As a courtesy, reasonable efforts will be made to contact donors or their heirs prior to deaccessioning objects from the museum's collections. The Curator/Archivist will:

- Prepare all required paperwork, including a deaccession and disposal form, and clearly document the deaccessioning process and disposal method.
- Approve and obtain authorization from a majority vote of the board of directors.
- Determine the method of disposal, taking into account the reason for deaccessioning.
- Modify catalog, accession files and database entries to reflect the change in status of the object
 and the change in monetary value, if any, for the collection. The records will not be deleted or
 removed but maintained intact for future reference.

Part V. Loans and Insurance

DEFINITION: Loans are temporary transfers of objects from one institution to another in which there is no transfer of ownership. The museum sends and receives loans for the purposes of exhibition, research, or education. The South Wood County Historical Corporation will exercise the same care of objects received on loan as it does in safekeeping its own objects.

A. PURPOSE OF LOANS

Lending and borrowing objects and specimens for exhibition, research, and educational purposes is integral to any museum's mission to make their collections accessible to the widest possible audience.

B. RESPONSIBLE PARTIES

All loan transactions will originate by and be the responsibility of the Curator/Archivist. The Curator/Archivist will maintain all associated loan paperwork. Upon the return of borrowed material, the museum personnel will unpack, inventory, and assess the condition of the returned materials. The Curator/Archivist will ensure that the borrowed items are adequately documented for insurance and liability purposes.

C. INCOMING LOANS

Incoming loan items shall be accepted when objects are needed for use in a special exhibit or educational program and shall only be kept for the duration of the exhibition or program. Objects may be borrowed from other educational or non-profit institutions, or individuals.

- The Curator/Archivist shall draw up an incoming loan agreement. It should include the precise time period of the loan and a detailed description of each item, with special attention paid to its physical condition.
- Copies must be signed by both the lending party/institution and the Curator/Archivist. One copy will be placed in the museum's curatorial files in an "Incoming Loans" folder.
- The South Wood County Historical Corporation will not accept any new object under loan

- conditions that might put the museum at substantial future risk of creating "indefinite" loan status for the object.
- The Curator/Archivist will contact the lending institution/individual and agree upon conditions of the loan, including the duration of the loan.
- Upon receiving the loan, the Curator/Archivist will inventory, inspect, assign temporary loan numbers (where appropriate), process accordingly, photograph, and make written notations of the findings.
- Any inconsistencies in the loan inventory or any change in condition of the borrowed objects during the loan period must be immediately reported to the lending party, and when appropriate, a full condition report will be prepared.
- Loans will be returned by the date agreed upon, and to the lending party identified on the loan agreement at the stated address, unless an authorized agent of the lender has given notice of change of ownership or location.
- All borrowed objects will be subject to the same level of care, security, and handling as objects in the South Wood County Historical Corporation permanent collection.
- The South Wood County Historical Corporation personnel will not transfer possession or alter in any way চায়ুভ্রেণ্ড (মির্ডার্নার ইন্টার্নার ইন্টার ইন্টার্নার ইন্টার্নার ইন্টার্নার ইন্টার্নার ইন্টার্নার ইন্টার ইন্টার

D. OUTGOING LOANS

- The South Wood County Historical Corporation only loans collection items to public or non-profit cultural, historical, or educational institutions. The museum does not loan objects to individuals. All requests for outgoing loans shall be brought before and approved by the Curator/Archivist. The museum must have a clear title to all items considered for loan. No item shall be loaned unless the borrower guarantees its security during travel and exhibition.
- Objects to be loaned must be stable enough to withstand travel, shipping and handling, and environmental change.
- All loans must be for a specified period of time, agreed upon by both parties. The item(s) may be renewed for another specified period if agreed upon by both parties.
- An outgoing loan agreement shall accompany each loan. In addition to containing a description
 of the item, including its physical condition, the period of the loan, the insured value, and the
 method of transportation, the agreement may contain other case-specific terms agreed to by
 the museum and the borrower.
- Copies of loan agreements are to be signed by both the lender and the South Wood County
 Historical Corporation Curator/Archivist. One copy will be placed in the curatorial files under
 "Outgoing Loans."
- The borrower assumes responsibility for the insurance of all loaned objects from the time the object leaves the museum until the object is received at the museum and the loan is terminated. The borrowing institution will also assume full responsibility for any loss of or damage to the objects. Objects on loan from the museum will not be reproduced or replicated in any manner without the written permission of the Curator/Archivist or Board of Directors.

Part VI. Objects Left in the Temporary Custody of the Museum

Objects that qualify as being left in the temporary custody of the museum include objects given to a museum for identification, examination for purchase or donation, and similar circumstances. The owner of these objects must sign a temporary custody receipt acknowledging temporary custody. These

objects are given to the museum with the understanding that they will be returned once assessments are made.

The policy of the South Wood County Historical Corporation for objects left in the temporary custody of the museum is as follows:

- The assessment of these objects is for the benefit of the owner, not the museum, and the museum will therefore only be responsible for gross negligence and will not provide insurance.
- The South Wood County Historical Corporation Curator/Archivist will carry out the desired assessments as quickly as possible to reduce potential complications in returning the item(s) to the owner with the requested information. This return will be made in a timely manner and should not exceed 90 days of the first custody exchange.
- The owner of the objects must make appointments with Curator/Archivist to discuss possible temporary custody arrangements, check on the progress of the assessment, and pick up the object and discuss the findings once the assessment is concluded.
- The museum will not treat, restore, or alter in any way the objects left in their temporary custody unless written permission is granted by the owner.
- A temporary custody receipt must be completed before the object is left in the care of the museum, specifying the conditions of the agreement and the assessment to be conducted.

If, after reasonable attempts have been made to contact the owner of the object, the object has not been picked up within 60 days of the assessment completion, the object will be understood as an unrestricted gift and the museum becomes the rightful owner.

Part VII. Care of Collections

Long-term preservation of the collections is central to the museum's mission. Collections care preserves individual objects and associated records, slowing down the process of deterioration.

Use and Access

- Access to the South Wood County Historical Corporation collections and collections data is available during regular museum hours for scholarly and educational purposes. All earnest requests for independent use of collected material will be considered by the Curator/Archivist, and access will be either granted or denied at the Curator/Archivist's discretion.
- The Curator/Archivist will establish specific access procedures for collections under his/her care.
- Stored collections (those not on exhibit) are not open to browsing by the general public, but Curator/Archivist can grant temporary access to these areas.

Security/Keys to Collections Storage Areas

- Keyed access to collections areas should remain as limited as possible. Keyed access to collections storage shall rest with the Curator/Archivist/Board of Directors.
- Visiting researchers and historians are allowed access to collections storage areas upon advanced agreement with the Curator/Archivist. Researchers will be supervised during their visit.
- Exhibited objects should remain under an adequate form of surveillance (either electronic or otherwise) during all museum hours.

Care and Handling

 Collections care includes the preservation and proper storage of objects and corresponding documentation.

- All materials brought into the collections must first be inspected for infestation or contamination. Contamination and infestation must be treated by an appropriate means of pest control (Integrated Pest Management Policy).
- Preservation of collected artifacts, specimens, objects, and materials should be achieved through the implementation of professionally accepted methods and techniques of Integrated Pest Management.
- All records, field notes, and documentation pertaining to collected objects should be similarly stored and securely maintained. This information is indispensable for maintaining the educational nature of collected materials.
- All accession, deaccession, and catalog information should be securely maintained. Electronic documentation should be duplicated (physically and digitally) and stored in a secure location separate from existing original documentation.
- All objects should be appropriately stored and properly defended against the agents of deterioration (e.g., pests, fire, water, vandalism, theft, and improper handling).
- It is the responsibility of the Curator/Archivist to ensure that no collected item is moved from its appropriate storage space without being properly documented first.
- In transit, items should be packaged safely and securely as deemed so by the Curator/Archivist.
- All members of the board of directors agree to abide by the care and handling policies as outlined at the end of this document.

Item Inventory/ Regulation

- A **complete inventory** of collected materials should be completed every 5-7 years (refer to next section of policy on inventories). This interval is subject to change based on curatorial needs and the availability of trained personnel.
- Any objects found to be missing should be documented. The Curator/Archivist should be notified, and any necessary measures should be taken to further secure collections areas.
- All inventory procedures should be overseen and approved by the board.

Part VIII. Inventories and Records

DEFINITION: An inventory is defined as a complete list of items such as property, goods in stock, or the contents of a building that are legally owned by the museum. An inventory is conducted to assure proper care and organization of the South Wood County Historical Corporation museum collections. By maintaining an up-to-date inventory, South Wood County Historical Corporation can keep an accurate count of what is in the collections. It can ensure that collections are in their proper and designated locations.

In order to begin the inventory process, the individual conducting the inventory should acquire a list of collection objects from the museum records (*inventory record*). There are two ways in which to perform inventories. The first is a **spot-check inventory**. A spot-check inventory should take place within the museum by the Curator/Archivist throughout the year. To conduct the spot-check inventory, the Curator/Archivist will randomly select 20-30 objects within the collection.³ A new inventory record should then be made with a list of just the 20-30 objects, leaving room for the individual to note the objects' location, the date, and their initials (spot-check inventory record). The Curator/Archivist will

³ The 20-30 objects selected should not be repeated from one spot-check inventory to the next within a two-year period. Once the complete inventory has been finished for the 5-7 year cycle, objects may be repeated.

confirm that the 20-30 objects are in their designated locations on the inventory record and fill in the proper information within PastPerfect.

The second way the South Wood County Historical Corporation will conduct its inventory is through a **complete inventory**. A complete inventory should occur within the museum every 5-7 years. To perform the complete inventory, the Curator/Archivist will create a complete inventory record, leaving room for the individual to note the object's location, date, and initials (*complete inventory record*). The Curator/Archivist will then confirm the location of every object within the museum's collection. Once complete, the form should be stored with the rest of the South Wood County Historical Corporation records within PastPerfect.

Missing Objects

While every museum should strive to know the location of all its objects, occasionally, objects within the collection might not be found while conducting an inventory for a number of reasons. While conducting a spot-check or a complete inventory, if an object is not found, the Curator/Archivist will note this on the record s/he is using and notify the Curator/Archivist. A thorough search for the object will occur throughout the exhibitions and storage areas.

If the object is still not found, a *missing object form* should be filled out and placed within the museum's designated binder for missing objects. This designated binder should be placed in a location that is easily accessible to individuals working at the museum, so that everyone may be aware of missing objects and can quickly check the binder if they believe they have located one.

A review of the missing objects records and binder should occur within the museum every 5-7 years. During this review, a thorough search for the objects should be conducted, and notes regarding the search conclusions should be made on the missing object records.

What to do if something on the inventory record is incorrect?

Updating the master inventory record as the spot-check and complete inventories are conducted is essential to this process. This way, the objects within the South Wood County Historical Corporation's collections will be easily found and accounted for.

• In a different location?

If an object is found to be in a different location than what is indicated on the inventory record, it is the judgment of the Curator/Archivist whether to move the object to its designed area or to update the master inventory record. Regardless, a note should be made within the record so that the Curator/Archivist can keep track of the movements of an object.

Condition has changed?

If the condition of the object has worsened since the last inventory was conducted, the master inventory recorded should be updated. The board of directors should also be informed of the deterioration of the object.

Records

Documentation and records are essential to contextualizing objects within the South Wood County Historical Corporation's collection. Records help establish the museum's right to retain objects within its collections legally, on temporary loan, and in temporary custody. Extensive record keeping allows the South Wood County Historical Corporation to know an object's location, condition, history, and legal status at any given moment, as well as a means for the museum to classify and catalog the objects within that collection.

How to Keep Records

The South Wood County Historical Corporation Curator/Archivist maintains its records and:

- Creates records in a timely fashion.
- Houses them in secure locations.
- Creates duplicate copies, both electronic, one housed on-site and one off-site.
- Ensures that records are kept regardless if the object that correlates with a given document is still in the museum's custody.

Records and Forms collected by the South Wood County Historical Corporation
Listed below are forms and records kept by the South Wood County Historical Corporation. These forms and records include:

- Accession
- Deaccession
- Deed of Gift
- Disposal
- Condition Reports
- Loans
- Inventory (both spot-check and complete inventory forms)
- Insurance Records (if applicable)
- Temporary Custody

Part IX. Access to Collections

The South Wood County Historical Corporation encourages using collections for research, exhibition, and educational programming through loans and on-site visits. Collection materials are available for study based upon reasonable requests. However, the museum must balance access to the collections with long-term preservation and personnel availability. Requests for access to the collections should be made in writing (letter or email) to the Curator/Archivist. A written request should include a summary of the requestor's background, research interest or proposed use of collection items, a list of items s/he wishes to access, and dates s/he is available for a collections visit.

Visitor and Employee Safety as It Relates to Collections

The Curator/Archivist takes responsibility for the safety of its visitors and personnel in its collections. As part of this safety policy, the museum will do the following:

- Check and consider all safety risks before accepting donations, accessioning items into its collections, or borrowing items for research or display.
- Deaccession all items already in the collections that may pose a potential safety risk.
- Design exhibits to facilitate the safest possible display of the items.
- Provide safety equipment such as nitrile or cotton gloves and surgical masks, to staff and researchers who work with any potentially hazardous collections items.
- Safely dispose of any materials found to be exceedingly hazardous to human health, if such objects are found.
- Properly house and maintain all items within its collections.
- Regularly monitor the collections.
- Appropriately label and maintain hazardous materials and train designated staff members to handle hazardous materials within the collections if this situation arises.
- Adhere to all local requirements for standards of safety and health concerns.

South Wood County Historical Corporation Care and Handling Policies

- Wear gloves when handling objects or work with clean, dry hands, depending on the material.
- Only handle objects when necessary.
- If you are going to handle an object, gently hold it by its most stable or solid component. Never pick up an object by its handle, rim, or projecting part.
- Use both hands to support it.
- Stop and think before handling an object.
- If you intend to move the object, plan a route and clear a path *before* moving. Know where the object is going to go. Consider how you will pick it up and what parts of it you will handle.
- If transporting objects long distances, use a cart.
- Do not hurry.
- Do not smoke, eat, or drink around collections.
- Use only pencil to document collections (no pens or sharp objects).
- Handle each object as though it were precious ("like a newborn baby").
- If an object is heavy or extremely delicate to handle on your own, ask for help.
- If a mishap occurs, report the occurrence to Curator/Archivist immediately. The Curator/Archivist will document the damage in a condition report.