

# WORTHINGTON HISTORICAL SOCIETY COLLECTIONS POLICY

Please note, these policies are intended as guidelines

**MISSION STATEMENT: "The purpose of the Worthington Historical Society (WHS) is to inspire and promote community interest in and appreciation for the history of Worthington, Massachusetts. To this end, we identify, select, gather, preserve, maintain, catalogue and make accessible to the public, historical documents and significant memorabilia from the town."**

## **I. SCOPE OF THE COLLECTIONS**

- A. The WHS archives and collections serve to fulfill its mission.
- B. The objects in the WHS collections exist in one of the following categories:
  - 1. Permanent collections and accessioned materials on, by, about, or representative of Worthington and the activities of people who live or have lived in Worthington that are owned outright by the Society for the purpose of study and exhibition. The materials include, but are not limited to:
    - a. Documents including letters, diaries, notebooks, manuscripts and newspaper/magazine articles in their original form and/or in digitized forms
    - b. Records of important town activities and institutions in their original form and/or in digitized forms
    - c. Artifacts and specimens including books and objects
    - d. Works of art
  - 2. Non-accessioned collections. These are materials that exist at the Society on a temporary or permanent basis. They consist of
    - a. Research and education: Supplemental information, e.g. from other collections, libraries, genealogical research that can be used in genealogical research, exhibits, lectures, public education, publications, etc.
    - b. Short-term loans (one year or less) for purposes of cataloging, exhibition or study.

## **II. GOVERNANCE OF THE COLLECTIONS**

- A. The Collections Committee
  - 1. The Collections Committee is a standing committee of the Worthington Historical Society.
  - 2. The chair of the Collections Committee is a member of the Board of Directors.
  - 3. The Collections Committee will meet as needed, at least annually.
  - 4. The WHS Collections Committee will endeavor to digitize and/or digitally document all items in its collections as completely and accurately as possible and make these data available to residents and the general public through an interactive online web site. It will attempt to identify

important gaps in the collection and to broaden holdings related to Worthington individuals, groups, themes, issues, and events that are currently under-represented in the WHS collection.

5. The Collections Committee will make recommendations to the Board of Directors with respect to acquisitions and deaccessions.

B. The Collections Policy

1. Copies of the Collections Policy shall be made available on the Worthington Historical Society website and to any person who requests them.

2. The Collections Policy shall be reviewed as needed.

3. Any member of the Collections Committee may make recommendations for changes to the Collections Policy. The recommended changes will be sent in writing to each member of the Collections Committee before any meetings at which they will be discussed and voted upon.

### III. ACQUISITION AND ACCESSION POLICY

A. The title to every object accessioned must pass to the Historical Society. Donors will be requested to sign a contract giving the Society sole ownership of the item/s. Items offered as long-term loans will not be accepted.

B. Criteria for determining whether an object should be accepted:

1. The object is consistent with the Society's mission.

2. The object is documented as having been made or used in Worthington.

3. The object is in good condition.

4. The Society can properly store and preserve the object.

5. The object will be used in the foreseeable future.

6. The object is not encumbered with conditions imposed by the donor regarding its future use or disposition.

7. The use of the object is not restricted or encumbered by intellectual property rights (copyright, patent, trademark, or trade secret).

8. The use of the object is not restricted or encumbered by its nature (e.g., obscene, defamatory, potentially an invasion of privacy, physically hazardous).

9. The object is so unusual that it presents an exceptional opportunity for the Society and thus should be given preferential consideration.

10. If the object is offered for sale, it or a comparable object might be obtained by gift or bequest rather than the purchase.

11. The acceptance of the object in all probability will not result in major future expenses for the Society (for conservation or maintenance or because it opens a new area of collecting).

C. Items that are offered and refused will be returned to the donor. The WHS will not be responsible for disposal of unwanted items.

D. Special concerns and situations:

1. Acquisitions by purchase shall be made only after:

a. proper financing has been arranged

- b. the Board of Directors has verified that the budget will allow the purchase.
  2. Materials left anonymously in the custody of the WHS will be evaluated and considered for inclusion in the collections. A donation form will be filled out by a member of the Collections Committee and filed. The disposition of the item – whether accessioned or disposed of – will be included on that form.
  3. The WHS may attempt to gain title to undocumented collections in its possession through the "abandoned property" law in the Massachusetts General Laws (MGL).
  4. Municipal records from the Town of Worthington will be accepted only if they comply with the Massachusetts Records Disposal Schedule.
  5. Documents and photographs may be accepted for scanning and inclusion in the WHS database without the object itself being physically added to the collection.
- E. Acquisition and Accessioning Procedures
1. The member of the Collections Committee will accept an item in temporary custody from the donor.
  2. If the donor is present he/she will fill out a "Donation Form" describing his/her intentions with the donation.
  3. If the item has been received in the mail, the member of the Collections Committee will fill out the "Donation Form" and obtain the donor's signature by mail.
  4. Items in temporary custody will be presented to the Collections Committee at their next meeting.
  5. The Collections Committee will decide by a simple majority vote whether to accept or reject the item for accession.
  6. Donations accepted into the collection will be acknowledged by a formal letter from the Board of Directors.
  7. Each item accepted into the collection will be immediately given a unique and standardized identification number for the purpose of cataloging and record-keeping.
- F. Tax Deductions: All gifts to the Worthington Historical Society are deductible on federal income tax forms according to Internal Revenue Service laws under 501(c)(3). By law, the donor is required to determine the value of the donation. WHS volunteers are not required to give an appraisal of donations.

#### **IV. DEACCESSION POLICY**

##### **A. Deaccessioning procedures**

1. The Collections Committee shall recommend items for deaccession if:
  - a. the object is a duplicate of an item already in the collection.
  - b. item is deteriorated.
  - c. the item does not in any way illuminate the history of Worthington or the lives of the people who lived here.
  - d. the item cannot be given the necessary care or preservation.
  - e. the item is inferior to others in the collection

2. The Collections Committee will discuss the proposed deaccession and by a simple majority vote confirm or reject the deaccession of the item. If they choose to deaccession the item, the Committee will make a recommendation to the Board of Directors to deaccession the item.
3. The Board of Directors will vote upon the recommendation of the Collections Committee to deaccession the item.

B. Special concerns or situations

1. No donated object shall be deaccessioned for any reason for two years after the date of its acquisition. (See U.S. Tax Reform Act of 1984 and I.R.S. regulations.)
2. Objects designated as unclaimed loans can be deaccessioned as abandoned property only with approval of the Collections Committee.

C. Disposal of items

1. The Collections Committee will attempt to notify the donor or heir of the intent of the Historical Society to deaccession an item.
2. The preferred way to dispose of deaccessioned items is by auction. If auction is not possible, direct sale is allowable.
3. No objects in the collection shall be sold directly to a member of the Board of Directors or staff or their immediate families.
4. In certain circumstances the WHS may choose to give an item to another institution. Upon the approval of the Board of Directors, the Collections Committee will follow through on these actions.
5. In certain circumstances the WHS may choose to consider a formal, reciprocal transfer of materials between the Historical Society and another institution or individual. Upon the recommendation and the approval of the Board of Directors, the Collections Committee will follow through on these actions.
6. With approval of the Collections Committee, certain deaccessioned items that are deemed unsalvageable may be destroyed.

D. Collections Fund

1. A Collections Fund will be created into which all net proceeds resulting from the disposition of deaccessioned items are deposited.
2. Withdrawals from the Collections Fund may be made for:
  - a. purchase of items for the collection
  - b. purchase of materials for the conservation of collections
  - c. conservation of artifacts
  - d. publications related to the collection

## V. USE AND ACCESS TO COLLECTIONS

- A. The Worthington Historical Society will attempt to catalog and digitize as much of its collection as feasible and make this digitized information available.
- B. Original materials may be accessed at the WHS archive site by request. A member of the Collections Committee will be present to assure that such objects are correctly handled and that materials remain undamaged. Particularly fragile items may be available only in digitized form. Archival materials are generally not available for circulation or loan, except by special arrangement.

C. Fees for research and copying services

1. Research requests should be made in writing, and persons will be charged a fee for filling research requests as determined by the Collections Committee.
2. Photocopies are available for a fee. All photocopying will be done by a member of the Collections Committee or volunteer staff. "Courtesy of the Worthington Historical Society" will be stamped on each sheet.
3. Original positive and negative images from the Society's collections may be duplicated for purchase. Fees will be established for the reproduction and publishing of photos, negatives, slides, and transparencies.

D. Publication and Reproduction Permission

1. Copyright protection extends to all unpublished works now protected under common law. This includes the collections of the Worthington Historical Society.
2. Researchers must obtain permission in writing from the Worthington Historical Society Board of Directors to publish any materials from the Society collections. This includes the reproduction of photographs or materials. Penalties for copyright violation are severe.

## **VI. CARE AND CONSERVATION OF COLLECTIONS**

- A. Every effort consistent with professional standards and ethics and within the financial resources of the WHS will be made to preserve the collections.
- B. The WHS collections will be stored and exhibited in environmentally safe conditions with museum-standard levels of temperature and humidity to the extent possible
- C. The Collections Committee will create a "Disaster Plan" to ensure the best possible protection of the collections in the event of fire, smoke, or water damage, or natural disasters.

## **VII. RECORDKEEPING**

- A. Systematic records concerning the Worthington Historical Society's collections shall be maintained at all times. They will consist of the following:
  1. Accession Records including Deeds of Gift, Transfer correspondence, copies of wills/trusts or other evidence of ownership, Donation/Gift Agreements, purchase records, insurance documents, valuation documents, etc.
  2. Deaccession Records
  3. Loan forms
  4. Notes on care and conservation of collections
  5. Notes for the interpretation and exhibit of collections
  6. Database inventory of collections
  7. Minutes of Collections Committee meetings, etc.
- B. Collections records will be protected, in so far as possible, from destruction by creating duplicate files to be stored in an off-site location.

## VIII. SECURITY

A. The Worthington Historical Society Board of Directors intends to preserve, conserve and insure the holdings to the best of its ability. This includes long-range plans to upgrade and maintain the security measures around and in the Historical Society building.

B. The WHS will maintain security and safety measures designed to protect the collections and the building.

C. The Collections Committee will review the procedures for access to the collections every year to minimize the risk of theft to the collections.

**IX. STATEMENT OF ETHICS:** The Worthington Historical Society endorses the Code of Ethics established by the American Association of State and Local History. The Board of Directors and volunteers working with the collections are expected to abide by these standards.

## X. DEFINITIONS

**Accessioning:** the formal process used to create an immediate, brief, and permanent record of an object, assembly, or lot from the same source, at the same time for which the Society has custody, right, or title, and assigning a unique control number to it.

**Acquisition:** the administrative process of discovering, preliminary evaluating, negotiating for, taking custody of, and documenting title of an object, assembly or lot.

**Cataloging:** the curatorial process of classifying and documenting objects usually in complete descriptive detail resulting in extensive information in the form of cards, files, publications, and automated data.

**Deaccessioning:** the formal process used to remove permanently an object from the collections.

**Documenting:** the process of producing records to identify and enhance the knowledge and value of collections with the intent of maintaining informational and intellectual control over them.

**Inventorying:** the overall function of creating, controlling and maintaining information, immediately and briefly, about all objects owned by, and in the care, custody, and control of a museum.

**Loans:** temporary transfers of collection items from the museum, or temporary transfers of similar items to the museum for stated museum purposes. The transfers do not involve a change of ownership.