

**San Luis Obispo Railroad Museum**  
**Collections Policy**  
*Adopted June 11, 2013*  
*Amended September 9 (part 12.3) and October 14 (part 3.5), 2014*

**Contents**

Museum Mission	2
Background of the Museum Collection	2
Collection Governance and Management	3
1. Purpose	3
2. Definitions	3
3. Intent and Organization of Museum Collection	4
3.1 Permanence and Access	4
3.2 Authenticity	4
3.3 Topical and Geographic Scope and Focus	4
3.4 Collection Categories	4
3.4.1 Documents	4
3.4.2 Small Three-Dimensional Artifacts	6
3.4.3 Engineering and Architectural Elements	6
3.4.4 Full-size Cars and Locomotives	6
3.4.5 Items Not Part of the Collection	7
3.5 Care of the Collection	7
3.6 Preservation Philosophy	7
4. Ownership	8
5. The Donation Process	8
5.1 Initial Evaluation	8
5.2 Board Approval	8
5.3 Receipt of Items	8
5.4 Acceptance and Inventory	8
5.5 Identification and Recognition of Donors	9
6. Use of Gifts	9
6.1 Display Limitations	9
6.2 Display Format	9
6.3 Library	9
6.4 Funding Support	9
7. Appraisals and Valuation of Donations for Tax Purposes	9
7.1 Responsibility for Tax Information	9
7.2 Time and Place of Appraisal	10
8. Non-acceptance of Potential Donations	10
9. Unsolicited Offers to Sell Items to the Museum	10
10. Pursuing Items to Expand The Museum’s Collection	
—Chance Finds	10
11. Pursuing Items for the Museum’s Collection	
—Specific Searches	11
12. Deaccession of Collection Items	11
12.1 Intent and Required Board Approval	11
12.2 Proper Disposition	11
12.3 Acquisition by Museum Member	11

13. Items Loaned to or from the Museum	12
13.1 Specific Conditions	12
13.2 Library Loans	12
14. Temporary Removal of Items from Museum Custody	12
15. Documenting Accessions, and Other Donations or Offers, and Deaccessions	12
15.1 Register	12
15.2 Documenting Acquisitions	13
15.3 Items not Accepted	13
16. Items Not Intended for the Collection; Changed Status	13
16.1 Utility and Consumable Items	13
16.2 Duplicate Items	13
17. Involvement of Museum Members in Collection Activities Generally	13
17.1 Personal Privilege	13
17.2 Personal Collection Activities	13
17.3 Appraisals	13
17.4 Individual Directives	14

## **Museum Mission**

The San Luis Obispo Railroad Museum is a non-profit educational institution. Founded to preserve and present California Central Coast railroad history by collecting, restoring, displaying, and operating relevant rail-road artifacts, photographs, models, and documents, its goal is to facilitate a better understanding of railroads' impact on our area's social, cultural, and economic history.

## **Background of the Museum Collection**

The Museum's collection began in 1991 under its predecessor organization, the Avila Valley Railway Museum. Among the early acquisitions were Pacific Coast Railway boxcars and Southern Pacific signal equipment. The Museum's collection is diverse, ranging from timetables to trackside signals to rolling stock. Nearly all items in the Museum's collection have been donated. Many valuable items have been donated by former railroad employees and their families. Several items have required extensive restoration, almost entirely done by member volunteers.

While not part of the collection, it is important to note that the Museum building, the 1894 Southern Pacific Freighthouse, is leased by the Museum from the City of San Luis Obispo, which has provided financial support and also has made available nearby, unimproved street right-of-way (the Emily Street Yard) for Museum storage and restoration activities. In addition, the display tracks on each side of the Freighthouse were built by volunteers using track materials mainly from the former Southern Pacific branch to Camp San Luis Obispo, which were donated by California Men's Colony (a State of California correctional system facility).

## **Collection Governance and Management**

The San Luis Obispo Railroad Museum is a nonprofit organization established by Articles of Incorporation under California law. Museum governance is prescribed in Bylaws adopted by the Museum's Board of Directors (referred to in this Policy as the Board) and occasionally amended with approval by a vote of the general membership. Museum activities and holdings are subject to many regulations, such as those of the Internal Revenue Service (nonprofit status), City of San Luis Obispo (buildings and grounds), Federal Railroad Administration (rolling stock and its movement), and California Public Utilities Commission (relationship of structures to active rail lines).

### **1. Purpose** - This Collections Policy is intended to assure that:

- 1.1 Items in the Museum collection are properly stored and used in support of its mission;
- 1.2 Those donating items, or otherwise supporting Museum efforts, feel appreciated and are confident that museum property will be wisely used;
- 1.3 There is an accurate record of all items held by the Museum as part of its collection, including their history of creation, ownership, and use, and their location, condition, and intended availability for display, reference, operation, and other purposes;
- 1.4 In consideration of limited space and curation resources, the Museum accepts and retains in its collection those items that best support its mission;
- 1.5 Decisions on acquiring and disposing of materials are consistent, timely, and made by the Museum's decision-makers at the appropriate level, as authorized by the Board, considering the nature of the material;
- 1.6 Disposition of any item not retained by the Museum supports the Museum's mission and, where appropriate, other's efforts to conserve and appreciate historical railroad materials;
- 1.7 Conduct of Museum members (whether or not officers of the Museum) concerning acquiring, caring for, or disposing of museum materials reflects well on the Museum and supports its mission.

### **2. Definitions**

- 2.1 "Accession" means to formally accept an item as part of the Museum's collection. Accessioned items are held by the Museum in public trust and in support of the Museum's mission.
- 2.2 "Consumables" are not part of the Museum collection but are used in the short term by the Museum in support of its mission, including developing and maintaining its collection or facilities, or in conducting public events and educational programs. Examples are food and beverages, office supplies, and items given to the public as learning aids or mementos or sold to the public for fundraising.

- 2.3. “Deaccession” means to formally remove an item from the Museum’s collection.
- 2.4 “Provenance” means an item’s origin and sequence of ownership, location, and use.
- 2.5 “Utility items” are possessed by the Museum but are not part of its collection. Examples include equipment, furnishings, tools, and materials used in developing and maintaining the Museum’s collection or facilities.
- 2.6 Singular and plural are used interchangeably within this Collections Policy, except where context clearly shows otherwise.

### **3. Intent and Organization of Museum Collection**

#### **3.1 Permanence and Access**

Items in the Museum’s collection are to be preserved in perpetuity in support of the Museum’s mission. The Museum will make every reasonable effort to provide public access to items in its collection, consistent with their preservation and the safety of all parties. Access may take the form of viewing only or of various interactive and hands-on activities. The type of access will be established by the Board, generally upon recommendation by relevant Museum committees such as Facilities and Operations, Curation and Archives, and Equipment and Artifact Restoration. The Museum will strive to make the collection and interpretative information broadly available to both in-person visitors and through media such as publications and the Internet.

#### **3.2 Authenticity**

The Museum places a high priority and value on owning original, authentic, and well-documented items, as opposed to reproductions or replicas.

#### **3.3 Topical and Geographic Scope and Focus**

The Museum focuses on the Pacific Coast Railway and locations it served, and on the Southern Pacific Railroad’s Coast Line from Los Angeles to San Francisco, including subsidiaries, branches, connecting railroads, and “in plant” operations such as industries and military bases in Santa Barbara, San Luis Obispo, and Monterey counties. The Museum’s scope also includes independent railroads, within these counties, of the type that served mining and agricultural activities. In addition to these named railroads and places, the Museum acknowledges the wider area served by the Southern Pacific and its connections to the North American railroad system, and successor railroads such as Union Pacific and Amtrak.

#### **3.4 Collection Categories**

The Museum’s collection is divided into four basic categories: documents; small three-dimensional artifacts; engineering and architectural elements; and full size cars and locomotives. The Museum also possesses supporting items that are not in its collection.

##### **3.4.1 Documents**

These comprise the broadest collection, covering the Southern Pacific railroad and its corporate predecessors, followers, and subsidiaries, wherever located, as well as railroads within the San Luis Obispo area, from their inception to the present. The Museum may

also collect documents relevant to industries or businesses that were very closely tied to local railroads, such as through interchange (coastal shipping), cooperation (Railway Express Agency), or dependence for transportation (early agriculture and oil activities). Documents are typically two-dimensional items or digital files. This category includes items such as photographs, drawings, timetables, logs and registers, reports, correspondence, books, and magazines. The Museum's library contains some documents that are archival and some that are not. An example of an archival document is a genuine paper item used by a railroad, such as a waybill. An example of a non-archival document is a contemporary book about a railroad.

Documents are managed by the Museum library, a non-circulating history and technology research collection with particular emphasis on the Pacific Coast Railway and the Southern Pacific Railroad Coast Line. The library exists to collect, preserve, and catalogue documents obtained by the Museum in support of its mission, and to make them available for member and public research and reference. Museum documents (or reproductions) are also used for exhibits, interpretative programs, publications, and to aid the Museum's restoration efforts. The Museum intends to make its document catalogue available online for public use, including access via automated database systems. As resources permit, digital images of photographs and of three-dimensional artifacts will likewise be made available online.

Specific classes within the documentary collection are:

3.4.1.1 **Published materials** pertaining to the history, operation, technology, travel, and economic, social, and political issues of California railroads. Examples include corporate publications such as manuals and rule books, brochures, timetables, menus, passes, tickets, pamphlets, and maps, as well as items published by others such as books, monographs, bibliographies and indexes, magazines and newspapers, government documents, and association reports. Also included are materials of broader scope but having particular relevance for the restoration, maintenance, and display of railroad artifacts, such as practices in car building, carpentry, painting, and electrical work.

3.4.1.2 **Archival materials** are typically produced by corporations, groups, or individuals, but not initially intended for wide availability. Examples are original engineering plans, records of train movements, and crew rosters, as well as correspondence and journals of those involved in local railroad activities. Local oral history recordings or transcriptions are also included.

3.4.1.3 **Pictorial and aural materials** include still photographs and video recordings, as well as original and reproduced artwork.

3.4.1.4 **Documenting Museum development** includes records generated by or concerning the development of this Museum, such as newsletters, newspaper articles, pamphlets, posters, and correspondence. Included are visual records in all formats of the Museum's public events and development and restoration activities.

### 3.4.2 Small Three-Dimensional Artifacts

These are items such as tools, fittings, hardware, signs, furnishings, and clothing. They generally are limited to items, or the same types of items, used in the area of focus (see part 3.3). They typically can be moved by hand effort. Examples include locks, lanterns, locomotive bells, telegraph and telephone appliances, uniforms, and dining car tableware. Mobile equipment, both on-rail and off-rail, which is movable by hand power, is also in this category. Examples include a velocipede, a handcar, and a “speeder.”

Not all small three-dimensional artifacts can be displayed at the same time or in the same way. Display and interactive exhibits are determined by overall Board direction, with implementation by the Museum’s Facilities and Operations Committee. Categories of small three-dimensional artifacts are:

3.4.2.1 **Reference study** objects may have little general public interest and so are displayed rarely or as a small fraction of their total number, instead generally being made available by prior arrangement for researchers.

3.4.2.2 **Exhibition** objects are kept for permanent, rotating, or changing display. They are typically “behind glass” or for viewing only. Examples are rare or relatively delicate items such as marker lights and telegraph keys of known provenance.

3.4.2.3 **Interpretive or teaching aids** are hand-held objects used by docents. Trained guides may manipulate them during Museum public hours and events. They may be passed around among groups of visitors under docent observation. Examples are unusual ticket punches and train-order hoops of known provenance.

3.4.2.4 **Interactive** objects may be handled or operated by the public during Museum public hours and events without close supervision, and as such will be subject to loss, wear, or damage. Examples are common switch locks and telegraph keys, or a model of a track switch.

3.4.2.5 **Operational** objects are typically mobile or moving items controlled by qualified operators or by others under close, qualified supervision. Examples are a handcar or a full-size track switch.

### 3.4.3 Engineering and Architectural Elements

These include items such as trackside signals and structure or building components, which typically cannot be moved by hand power. They generally are limited to the types of items used on the Central Coast. An example is the wig-wag crossing warning signal.

### 3.4.4 Full-Size Cars and Locomotives

Due to their size and high cost of transportation, restoration, and care, these must strongly support the Museum's primary interpretive themes, with a particular emphasis on railroads that served the Central Coast up to about 1960. Included are three-foot gauge and standard-gauge freight and passenger cars, cabooses, maintenance-of-way cars, and locomotives. Full-size cars and locomotives generally will be in one of the following conditions:

A. undergoing restoration and intermittently viewable

- B. on permanent static display
- C. occasionally operational

#### 3.4.5 Items Not Part of the Collection

Consumable and utility items, while not part of the collection, are essential for support of the Museum's mission. An inventory of major utility items, having values above a threshold set by the Board, will be maintained by the Treasurer (as part of an accounting for the Museum's assets) with assistance of the Facilities and Operations Committee and other committees as appropriate.

Models are not Museum collection items. However, accurate small-scale depictions of full-size items have a valuable role in portraying and interpreting railroad themes. Models possessed by the Museum generally are governed by the same considerations as small, three-dimensional artifacts. The Facilities and Operations Committee is generally responsible for any models that are not part of the model railroad display. The Model Railroad Committee is responsible for labeling and maintaining an inventory of their items, as distinct from items that are the personal property of members or others who may bring such personal property to the Museum.

#### 3.5 Care of the Collection - Curation

The Museum intends to house its collection consistent with professional standards for the documentation, storage, care, and use of cultural resources. The Museum prefers to house its collection indoors, with adequate security and monitored environmental conditions. However, the Museum recognizes that secure outdoor settings may be the only feasible or desirable location for items such as large engineering and architectural elements or full-size cars and locomotives.

The Board may designate a member or staff to serve as Curator. The Curator's duties include:

- evaluating potential donations for consistency with Museum collection policies and objectives;
- working with potential sources, whether donors or sellers, to obtain collection items;
- recommending specific standards and practices for inventory and care of the collection;
- supervising work on, and coordinating with Museum officers or committees, concerning the storage, display, and restoration of collection items;
- serving as the primary contact for acquiring small three-dimensional artifacts, architectural and engineering features, and full-size rolling stock.

#### 3.6 Preservation Philosophy

Preservation and conservation of the collection are to be done cautiously and with sensitivity. Restoration of cars, locomotives, and small three-dimensional artifacts is to be based solidly on careful research and documentation. Restoration is to be historically accurate to a verifiable date in the item's history. The Museum places high value on preserving an item's original character and materials. Restoration using authentic materials and techniques is preferable to wholesale reconstruction. All work is to be well documented. The Museum adheres to truth in labeling to accurately convey in all interpretive media the honest history, ownership, and use of each collection item. The Museum avoids restoration to an appearance based on expectations of how a certain item should appear as an icon. The Museum accepts that items used in a railroad environment will have been worn, damaged, and modified or repaired during their useful lives.

#### **4. Ownership**

The Museum strongly prefers to own and have full, clear title to all collection items. The Museum also places a high value on owning all associated copyright, literary, and intellectual property rights associated with collection items.

#### **5. The Donation Process**

##### **5.1 Initial Evaluation**

Prospective donors are encouraged to contact the Curator or members of the Curation and Archives Committee to discuss a proposed donation to the Museum's collection. (Contact numbers and e-mail addresses are found under the heading "Contact Information" on the Museum's web site.) In making a preliminary decision to accept an item, these designated representatives consider issues such as relevance, provenance, title (form and certainty of legal ownership), location, intrinsic value, and condition. Upon initial assessment, the Museum representative will indicate whether there is an interest to receive the item offered for donation.

##### **5.2 Acceptance and Board Approval**

Board approval is required for acceptance of substantial engineering and architectural elements and for full-size cars and locomotives, because of the resources needed for their proper care and display. (The Curation and Archives Committee will make recommendations whether or not to accept such items.) Acceptance of documents, small three-dimensional artifacts, and models require approval by the Curator or members of the Curation and Archives Committee. Such items may be provisionally accepted by docents or other designated Museum members during Museum public hours or events. All accepted donations will be reported to the Board. In making their recommendations and decisions the Board, the Curator, and the Curation and Archives Committee use the criteria of relevance, provenance, title, location, intrinsic value, condition, and existence of like items already in the collection.

Any member may accept donations of consumables or utility items that support the Museum's mission. Such donations will be promptly reported to the Board at its regular meetings.

The Museum always reserves the right to decline a proposed donation.

##### **5.3 Receipt of Items**

The Museum prefers to receive donations for its collection at the Museum, at a time mutually agreed by the donor and the Curator or the Curation and Archives Committee. In some instances, the Curator or the Curation and Archives Committee will give instructions for shipping items or may arrange for transport or pick-up of large or valuable donations.

##### **5.4 Acceptance and Inventory**

As items are received, the Curator or the Curation and Archives Committee prepares a standard donation form for the donor to review, sign, and date. (Donors may help expedite the inventory and gift process by preparing in advance their own itemized listing of their donated items.) An agent may sign for a corporation. In some instances, both husband and wife sign the donation form. Upon Museum receipt of the signed forms, the donated items move from pending acquisition status to that of donated objects or materials. The Museum will maintain a secure holding area for recently received items to assure that they are properly evaluated and documented before being stored, displayed, or possibly reclassified as non-collection items.



### 5.5 Identification and Recognition of Donors

Donors receive the satisfaction of knowing their donated items become part of the San Luis Obispo Railroad Museum collection, or otherwise support the museum mission. (They may also receive tax benefits; see part 7.) The Museum Board may establish means of recognition by name for donors. The Museum recognizes that some donors prefer to remain anonymous or to receive only a brief acknowledgement letter regarding receipt of their gift. Gifts may be made in memory of an individual.

## 6. Use of Gifts

### 6.1 Display Limitations

Available exhibition space limits the type and number of items that can be exhibited at any one time. Donated items are periodically rotated for display. The Museum cannot agree to permanently exhibit any donated item as a condition of donation.

### 6.2 Display Format

In general, the Museum houses like material with similar types of materials. Following advance discussions with the Curator or the Curation and Archives Committee, large or particularly significant groups of items from a single donation may be displayed together and specifically identified by the name of the maker, the donor, or the donor's family.

### 6.3 Library

Documentary items are kept in the Museum's library where, once cataloged, original documents generally are available only by prior arrangement. The Museum attempts to make images of documents available for online viewing at any time.

### 6.4 Funding Support

Accompanying cash contributions are encouraged to help process, conserve, properly store, and display large and significant donations.

## 7. Appraisals and Valuation of Donations for Tax Purposes

### 7.1 Responsibility for Tax Information

Donations to the Museum are deductible, to the full extent allowed by law, for both Federal and State of California income tax purposes. It is the responsibility of donors to consult Federal and State rules, or their tax advisors, regarding any tax benefits, proper documentation, and in particular the implications of large donations. Museum representatives cannot offer tax advice. The Museum cannot provide a dollar value to donors or prospective donors for the purpose of tax deductions. The Internal Revenue Service (IRS) does not permit the benefiting institution, the Museum, to appraise donated objects. If a formal appraisal of a gift is desired, it is the responsibility of the donor. However, for a major donation requiring a specially qualified appraiser, the Museum may be able to help identify a suitable appraiser and to help arrange the appraisal process. In some instances, Museum representatives may be able to suggest price guides or dealer's sales lists for comparable non-unique items such as published books, a railroad lantern, or piece of railroad china. When requested, a Museum representative will complete the appropriate IRS form covering the receipt of non-cash charitable contributions.

## 7.2 Time and Place of Appraisal

It is very helpful for Museum representatives to know early in the donation process if the donor anticipates engaging the services of an appraiser to provide a detailed appraisal for tax purposes. The valuation is based on the fair market value, on the date of gift. Because donated items may be moved or altered soon after acceptance by the Museum, the Museum prefers appraisals be made before acceptance. However, Federal and State rules concerning advance formal appraisals should be consulted as they may limit how long before the actual date of gift an appraisal may be done.

## 8. Non-acceptance of Potential Donations

The Museum may be unable to accept an offer of donation due to a factor such as the type, location, or condition of an item, or to the number of like items already in the Museum's collection. The Museum may accept a donation with the mutual understanding that the item will be used to support the Museum's mission but not as part of its collection (such as consumable and utility items). For items that are not accepted, the Curator or the Curation and Archives Committee will explain the reason for non-acceptance and may suggest other potential recipients for the materials, or sources that would help connect potential donors and suitable recipients.

## 9. Unsolicited Offers to Sell Items to the Museum

Museum members may be approached concerning the Museum buying items for its collection, without any previous expression of interest by the Museum. In such cases the member will inform the prospective seller that such expenditures require approval by the Museum Board or certain parties that it has designated. The prospective seller will be advised of the process for the Board or parties to make such a decision, including Board meeting dates and location and the fact that meetings are open to the public. If the member who has been approached believes the item would have particular value for the Museum, the member may offer to present the issue of acquiring the material to the Board with, or on behalf of, the prospective seller. Other than transmitting information about potential cost or benefit for the Museum between the prospective seller and the Board, members will refrain from negotiating purchases except at specific direction by the Board.

## 10. Pursuing Items to Expand The Museum's Collection —Chance Finds

Members may become aware, through their own efforts or by chance, and without prior Board direction, of materials that would be particularly worthwhile additions to the Museum's collection. The member will first advise the owner of the benefits of donating the material. If the owner expresses a desire to sell rather than donate the material, the member should offer to present the issue of acquiring the material to the Board with, or on behalf of, the prospective seller. Other than transmitting information about potential cost or benefit for the Museum between the prospective seller and the Board, members will refrain from negotiating purchases except at specific direction by the Board. There may be cases where a member believes a timely and relatively minor purchase by the member would serve the Museum's mission, and that the opportunity would be lost without prompt action. While this is a welcome intent, any item bought by a member without specific Board authorization, but with expectation of acceptance or reimbursement by the Museum, is solely at the member's risk and does not obligate the Museum.

In cases of a particularly valuable acquisition that would be lost without prompt action, the Board's executive committee may be polled for approval of the action without holding a meeting.

The Board may approve an annual budget for collection acquisitions of relatively inexpensive items and authorize the Curator or the Curation and Archives Committee to encumber or spend such funds and report them to the Board.

## **11. Pursuing Items for the Museum's Collection —Specific Searches**

Upon direction by the Board, a member or group of members may pursue acquiring materials for the Museum by donation, trade, or purchase. Such pursuit may be for a specific item known to be available, or a general search for a type of item. It is important that any member working at Board direction not exceed that direction, especially by appearing to represent a position not taken by the Board or to be dismissive of any offer in a manner that would discourage a prospective donor from having a positive relationship with the Museum.

## **12. Deaccession of Collection Items**

### **12.1 Intent and Required Board Approval**

Once acquired by donation, or any other means, items that become part of the Museum's collection are carefully held in public trust. Deaccessions of items in the collection are rarely made. (Consumables and utility items donated to the Museum may be disposed of in any manner approved by the Board, consistent with its ethical and fiduciary responsibilities.) It may be necessary or desirable for the Museum to remove an item from its collection for reasons such as condition, lack of resources for proper storage or curation, or opportunity to exchange the item for something of greater benefit to the Museum's mission. Deaccessions require approval by the Board. The Curation and Archives Committee may recommend an item or groups of items for deaccession. The committee recommendation and Board action will identify the reason for deaccession and means of removal (gift, trade, sale, salvage of parts by the Museum, or other disposal).

### **12.2 Proper Disposition**

12.2.1 In offering deaccessioned items for sale, the Museum will seek the highest return for the Museum, considering all factors in the transaction (including matters such as transportation and altering the condition of the item).

12.2.2 The Museum will practice proper disposal or recycling, considering the nature of the item being deaccessioned.

### **12.3 Acquisition by Museum Member**

A Museum member shall not obtain any deaccessioned item, in fact or by appearance, except on terms available to any person whether or not a Museum member. No Museum officer or Board member may buy, trade, or receive a deaccessioned collection object, unless all of the following apply: such person buys the item at fair market value; the fair market value of the item does not exceed \$100; the item has been offered for acquisition by the general public on the same terms for at least 30 days following approval of deaccession.

### **13. Items Loaned to or from the Museum**

#### 13.1 Specific Conditions

All loans require Board approval and generally are limited to short-term arrangements with other museums or responsible organizations. In exceptional circumstances, loans of items to or from the Museum may be arranged to meet the Museum's mission within the wider community of preserving and displaying historical railroad materials. Loans to or from the Museum will be subject to mutually approved written agreement specifying the item being loaned, the duration and purpose of the loan, acceptable use of the item while on loan, and responsibility for matters such as insurance, transportation, and display.

#### 13.2 Library Loans

The Curation and Archives Committee may develop policies and procedures for short-term loan of the Museum's library materials to other qualified institutions or researchers, where the material is replaceable and reasonable security for return of the item is provided. The Museum prefers, when copies of library materials can legally be made, that copying be done at the Museum facility. (See also Appendix A, "Document Curation Standards." [forthcoming])

### **14. Temporary Removal of Items from Museum Custody**

Removal of a collection item from Museum custody by another party for a purpose such as assessment or restoration is not considered a loan, but is subject to approval by the Curation and Archives Committee and will be documented, including the identity of the party having custody and the intended purpose, location, and duration of the removal.

### **15. Documenting Accessions, and Other Donations or Offers, and Deaccessions**

#### 15.1 Register

The Museum will maintain a register of all items in its collection, in a manner established by the Curation and Archives Committee. The register will contain, at the least, a brief description of the item, the date acquired, and the source. Each item shall be assigned a unique identification number. Whenever possible, the actual item or its container will be labeled with the number. The register itself may contain, or by identification number be linked to, additional information including: a photograph or digital file of the item; the history of its manufacture, ownership, and use; the means of acquisition; intended limitations on its use and display.

The register and associated database should be searchable by various fields corresponding to these types of information. The register will be available for examination by any member of the Museum; it may be made available for examination by any member of the public.

The data linked to the register may include an estimate of dollar value, as for insurance purposes. This information may be accessible only by officers of the Museum as determined by the Board.

The register will note the date and reason for deaccessioned items.

### 15.2 Documenting Acquisitions

The Museum will employ a standard, multi-part form to document receipt of donated items. If the same form is used for items intended for the Museum collection and for items not intended for the collection but otherwise supporting the Museum's mission (consumables and utility items), the form will clearly indicate the item's status as being intended for the collection or not. It is important that the form contain a complete description of items intended for the collection, as it may be the only source for the register and database information noted above.

### 15.3 Items Not Accepted

To provide consistent information for all interested parties, the Museum may maintain guidelines concerning items typically not accepted as donations (or desired as acquisitions), including suggestions for organizations that would be more appropriate recipients.

## 16. Items Not Intended for the Collection; Changed Status

### 16.1 Utility and Consumable Items

The Museum may acquire or dispose of, by any means consistent with its Charter and Bylaws, items clearly not intended for its collection. Examples include supplies and tools used in developing and maintaining the Museum's collection or facilities, consumables for events, and items for fund-raising by sale or raffle. When there may be ambiguity as to the intent of the donor or the Museum's intended use of a donated item, the receipt for the item should note the Museum's intended use.

### 16.2 Duplicate Items

An item that duplicates one held in the Museum's collection but which was acquired for another purpose, such as providing spare parts for maintenance or restoration, will be clearly documented. Reclassification of an item between "collection" and "non-collection" requires the same type of Board action and record keeping as accession and deaccession.

## 17. Involvement of Museum Members in Collection Activities Generally

### 17.1 Personal Privilege

Museum Board members, officers, general members, and staff will assert no personal privilege over the acquisition, disposition, or use of any collection object. These parties are prohibited from using any collection object, or their special access to collection objects, for purposes other than for official business of the Museum.

### 17.2 Personal Collecting Activities

No Museum member, including directors and officers, may use his or her Museum affiliation to promote personal collecting activities. No director or officer may compete with the Museum in any personal collecting activity.

### 17.3 Appraisals

Responsibility for the appraisal of all gifts, such as for tax purposes, rests with the donor. No Museum officer or board member may serve as an appraiser of a gift to the Museum.

#### 17.4 Individual Directives

While the Museum recognizes the outstanding monetary and labor contributions of its individual members and others, control of collection objects rests entirely with the Museum. The Museum's mission and goals must take precedence over the desires or directives of any individual donor of cash, labor, material, or item.