



Collections Management Policy

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I. INTRODUCTION TO COLLECTIONS POLICY

The purpose of this Collections Management Policy is to provide clear guidance on all matters related to collections for those who are responsible for maintaining this public trust, including Museum staff, members of the Cultural Resources Committee, members of the Five Oaks Museum (FOM) Board of Directors, and the County of Washington, Oregon, the acting owner of the collections. This policy addresses all issues related to the Museum's object collections and archives, research library, its education collection, and items held temporarily. This policy supersedes previous policies for collections management at the Museum (previous version adopted February 2015) and addresses current legal and ethical developments in collections stewardship to establish solid future professional practices.

A. Museum Values

Body

We recognize that all bodies have the right to be safe and welcome. We exceed ADA compliance and provide audio, tactile and visual display content. We provide water, food, quiet, movement and other support for wellbeing; we respond to input about how we can welcome folks with specific bodily needs.

Land

We believe that the land (the Earth, the ecosystem) is the beginning and end of every story. We recognize the millennia of stewardship that Native people have given — and continue to give — the land. We tell stories of the land and animals in conjunction with stories of people. What can we do to walk the walk of environmental stewardship?

Truth

We take truth to be an orientation rather than a fixed state, and we remain persistently devoted to its pursuit. We maintain a high level of rigor in supporting all of our work with research, and we highlight complexity and nuance in our content.

Justice

History and culture are tools of production; they must be used in resistance to structural inequity so as to support the possibility of justice for all. We apply an equity lens to all of our actions and products. We uplift many voices and ways of understanding the world.

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Community

The people who share their time and attention with the museum are the reason that it exists, and all of our work is approached with generosity towards them in mind. We trust the expertise and capability of the community and include community leadership and input into everything we do. We center descendant communities in all storytelling work.

B. Statement of Authority

The Washington County Historical Society (previously known as Washington County Museum and hereafter referred to as Five Oaks Museum—FOM) is a 501(c)(3) nonprofit organization, governed by a Board of Directors. The Federal ID number is 93-603-1454.

FOM collects and holds its collections in public trust for the people of Washington County, as stated in the contract between FOM (signed under former name Washington County Museum) and Washington County, Oregon, dated September 7th, 1987. (See Appendix B)

Executive Director(s) – has final authority on all decisions affecting the collections and delegate responsibilities to the Cultural Resources Manager as deemed necessary. The Executive Director(s), appointed by the Board of Directors, has the authority to interpret all sections of the Collections Management Policy. The Executive Director(s) is advised by the Cultural Resources Committee and staff in making recommendations for all aspects of collections policy.

Cultural Resources Manager (CRM) – is responsible for the overall management of the Museum’s cultural resources, including its collections, archive, and research library. Responsibilities include conducting ongoing care of the collections, working closely with contracted Guest Curator(s) and Librarian(s), and overseeing Cultural Resources volunteers. Day-to-day care of collection materials includes oversight of the physical condition of the collections, the documentation of their contents, and the location and status of all objects contained in the collections.

Cultural Resources Staff and Volunteers – work with the CRM to take care of the collection and adhere to the Code of Ethics designated by the American Alliance of Museums (AAM) Curators Committee at all times during employment within the museum. They will be guided in their collections related work by this policy and related procedural manuals.

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Cultural Resources Committee – is comprised of volunteers with professional expertise or special knowledge about material culture. They are knowledgeable about the Museum and its history. The duties and responsibilities of this committee may be divided into Advisory, Advocacy, and Participation. The committee is chaired by an appropriately-trained representative from Washington County and staffed by the Cultural Resources Manager and Executive Director(s) as necessary.

Advisory: The Committee considers and advises on policies and procedures that govern the collection's preservation and management. It supports the Cultural Resources Manager in oversight of the collection of objects and library materials that support the Museum's mission. It monitors accessioning, deaccessioning, and incoming/outgoing loans. It urges compliance with the generally accepted professional standards of museum operation and offers assistance in meeting these standards. The Committee gives consideration to the manner in which exhibitions meet the interests of its public and the overall mission of the Museum.

Advocacy: The Committee assists in securing artifact and library materials both for the collection and also in support of specific limited duration exhibits. The Committee conveys support for collections grants or other sources of funding; it serves as a community voice to assist in the realization of museum goals that fall under its purview. Opinions on any aspect of museum operation that falls under the purview of the committee are expressed as a majority vote.

Participation: Committee members assist in appropriate tasks under the supervision of staff as requested by Board or staff.

Board of Directors – led by the Board President and is responsible for the governance of FOM. The Board approves FOM goals, policies, and the annual budget.

II. SCOPE & PURPOSE OF COLLECTIONS

A. Description of Collections

Five Oaks Museum collects artifacts (along with their associated data and documentation) and two-dimensional library and archival materials that document and illustrate the historical, cultural, and technological heritage of Washington County, Oregon. The artifact,

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archival, and library collection spans from Oregon's earliest human habitation to contemporary times.

The collections support FOM's mission through their use in interpretive onsite and traveling exhibitions, educational and public programs, research, and publications. The collections are divided into three categories:

1. **Permanent Collections:** Materials subject to special handling (i.e. conservation, preservation, and greater standards of care), storage, paperwork, and exhibition. Items in the Permanent Collections may be digital or physical and shall be cared for and documented accordingly. The Permanent Collections are comprised of four sub-categories:
 - Archival
 - Artifacts
 - Fine Art
 - Library
2. **Non-Museum Holdings:** Items designated as non-museum holdings that are not subject to the collections management policies set forth in this document. Non-Museum Holdings are comprised of five sub-categories:
 - Education Collection
 - Reference Files
 - Subject files (e.g. newspaper clippings, pamphlets, notes)
 - Museum ephemera (e.g. internal communications, exhibition collateral)
 - Administrative Files (internal access only; closed to the public)
 - Digital surrogates (digital copies of permanent collection materials)
 - Staging materials
3. **Temporary Collections:** Artifacts and exhibitions on loan for a set amount of time and not owned by Washington County or FOM.

B. Categorizing Collections

1. Permanent Collections

The permanent collection consists of objects and materials deemed worthy of long-term preservation which have been accessioned by the Museum. They are the legal possessions of Washington County and are maintained and cared for in perpetuity by FOM. All

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permanent collections shall be maintained in the best possible condition and treated with due and appropriate care at all times, in accordance with professional standards. For greater detail on standards of care, please refer to the appropriate manual of practice. The permanent collections include four collections: the archives, artifacts, fine artwork, and research library.

- A. Archival Collections: The archival collection includes personal papers, institutional records, and ephemera from the early 1800s to the present. Materials include photographs, documents, manuscripts, records, diaries, albums, prints, various media, and other historical source material. This collection represents Washington County's individuals, families, organizations, and businesses.
- B. Library Collection: The library consists of published works, in any medium, including but not limited to books, journals, and magazines. These materials have been acquired for the use in the museum's library for research and study by museum staff, students, and visitors. The subjects may range from Washington County, Tualatin Valley, and Oregon history with broader contextualization to archival and museum best practices and standards.
- C. Artifact Collection: The objects collection contains items related to Washington County and Tualatin Valley history specifically, and Oregon history more broadly. Item categories include, but are not limited to, Native American artifacts, agricultural technology, household goods, logging equipment, pioneer and Oregon Trail history, transportation, food products, medical and psychological materials, textiles, communication devices, toys, recreational objects, personal effects, and musical instruments.
- D. Fine Artwork Collection: The fine artwork collection contains contemporary works of art that are pertinent to the Five Oaks Museum mission, including but not limited to commissioned artwork from past exhibitions. Fine artwork can be formatted digitally or physically.

2. Non-Museum Holdings

Non-museum holdings consist of items and ephemera that have been deemed relevant to the Museum's research initiatives, but do not meet the requirements for long-term

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preservation.

- A. Education Collection: Objects intended for use by Five Oaks Museum in its educational programs and related activities. Objects in the education collection are intended for touching and handling, but should nonetheless be treated and maintained with appropriate care. The education collection may include replicas of objects or downgraded objects from the permanent collection. Any such replicas should be properly labeled and/or identified so as to distinguish them from objects in the permanent collection. Any downgraded objects must meet deaccessioning requirements to qualify for the education collection.
- B. Reference Files: Items that enhance the research library and archival collection.
 - Subject Files: Materials that include but are not limited to newspaper clippings, brochures, flyers, and documents from various organizations and individuals that are related to Washington County and the surrounding area.
 - Institutional Ephemera: Items in the Washington County Museum/Five Oaks Museum collection include photographs, recordings, newspaper articles, internal memos and communications, and printed collateral related to the Museum's staff, programs, and exhibitions over its years of existence as an independent nonprofit.
- C. Administrative Files: Internal documents and records that shall be maintained, but are not open to public access or research.
- D. Digital Surrogates: Digital reproductions of material objects that provide access to cultural history while preserving original materials.
- E. Staging Materials: Items such as props and furniture, which may be vintage but are not necessarily historical, that are used in exhibitions to enhance or further explain objects on display but are not accessioned into the collection. Examples include, but are not limited to furniture, tools, or mannequins.

3. Temporary Collection

The temporary collection includes artifacts and exhibits on loan for a set amount of time not owned by the Museum. Items loaned to FOM will receive the same degree of care and

preservation given to objects in the Museum's permanent collections, unless otherwise specified by the lender.

III. ACQUIRING & DEACCESSIONING

A. Criteria for Acquisitions

The Museum acquires items for its collections through donations, bequests, transfers, purchases, or other appropriate methods as outlined in the manuals of practice. The Cultural Resources Committee shall consider the following general criteria when evaluating an object for potential addition to the Museum's collections:

- The object's relevance to the Museum's mission, values, purposes, and activities.
- The object's appropriateness to the Museum's goals as specified in the appropriate manual of practice.
- Native American objects will only be accepted with appropriate tribal consultation.
- Additional details about acquisition criteria can be found in the appropriate manual of practice.

All items must have free and clear titles which, for the purposes of this document, means there is no outstanding lien, encumbrance, mortgage, security interest or other outstanding legal claim, financial or otherwise, involving the object to be acquired.

Restrictions on Acquisitions

The Museum will not normally acquire objects whose donors wish to attach conditions to their donations, and in no case will the Museum permit donors to permanently restrict the Museum's freedom to use, display, store, or dispose of such objects. Similarly, the Museum cannot and will not guarantee to place specific objects on permanent or long-term display, or that objects donated as a group will be retained or displayed as a group.

In exceptional circumstances, the Cultural Resources Committee may consider requests by donors to limit or deny public access to certain objects or materials until a specified condition occurs (e.g. a specified number of years has elapsed; certain named persons are deceased). In the event the Museum elects to acquire an object on this basis, a written

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document must be prepared clearly specifying the restrictions to be agreed upon and the circumstances upon which they terminate.

Objects Unsuitable for Acquisition

The Museum will not acquire objects from anonymous sources. This includes objects left on or outside the Museum's premises. The Museum will not acquire objects it believes have been unethically or illegally collected, including those collected in violation of federal, state, local, and/or international laws and agreements.

Legality of Acquisitions

The Museum will make all reasonable efforts to ensure that the objects it acquires have been collected and/or imported in full compliance with the laws and regulations of Oregon and the United States, including the Native American Graves and Repatriation Act (NAGPRA) and UNESCO's Convention of 1970.

Appraisal of Acquisitions

The donor of an object to the Museum has the exclusive responsibility for obtaining any appraisal to be used as the basis for any tax deduction to which that donor may be entitled. The Museum may also elect to submit a donated object for independent professional appraisal for insurance purposes, but is under no obligation to do so.

No member of the Museum staff or Board or any other person closely associated with the Museum shall be permitted to conduct monetary appraisals of objects being considered for acquisition by the Museum. However, Museum staff members may provide impartial assistance to donors seeking qualified independent appraisers.

Accessions

The Cultural Resources Manager will accept objects for the Museum's collections on the County's behalf. All objects acquired by the Museum through exchange, donation, and/or purchase must be documented by use of an accession form prepared by an authorized Museum staff member, and by a detailed Deed of Gift, Bill of Sale, or other inventory as appropriate.

The Museum's CRM shall maintain files reflecting all records for objects in the Museum's collections. Files will be maintained to appropriate professional standards. Maintenance of

the files shall include creating digital and paper copies of all documents and deposit of such files in a safe and secure location.

B. Deaccessioning

The Museum may evaluate its collections and the objects therein in light of its ability to display, maintain, store, and/or preserve such objects in accordance with its mission, purposes, and activities. If the Museum determines that retaining ownership of given object(s) is no longer consistent with these objectives, such objects may be deaccessioned. All objects chosen for deaccession shall be subject to the Museum's formal deaccession standards and procedures as outlined in the appropriate manual of practice.

Criteria for Deaccessions

The criteria for evaluating objects being considered for deaccession shall be the same as those used when considering objects for acquisition, except that:

- Objects deemed to be unique and/or irreplaceable should be deaccessioned only on the strictest possible consideration
- Objects which have deteriorated beyond usefulness shall be deaccessioned as promptly as possible once a determination to that effect has been made by the CRM and/or Cultural Resources Committee
- Objects determined to be missing and/or stolen shall be formally deaccessioned either after three years following the date the determination is made, or within six months after recovery of the object(s) is determined to be impossible
- Objects pose a hazard to personnel or the rest of the collection
- Object has been deemed a forgery
- NAGPRA or relevant laws apply to the object

Methods of Deaccession

Objects being deaccessioned may be disposed of in any of the following ways, as determined by the Cultural Resources Manager and Committee. Please see the appropriate manual of practice for further details. The approved disposal methods are:

- Objects may be exchanged with or donated to other institutions or organizations in furtherance of the Museum's and the recipient's mutual interests. Wherever possible

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and appropriate, this shall be the preferred method of deaccession. Preference shall be given to nonprofit, charitable, and/or educational organizations and institutions.

- Consideration will be placed upon the object if it is viable and usable for the Education Collection, with input from the Learning staff.
- Objects with significant intrinsic value may be sold to other institutions or individuals. Any monies received from such sale shall be deposited in a restricted fund to be used solely for care of the Museum's collections and/or acquisition of objects for such collections.
 - Note that an object shall not be sold to any individual associated with the Museum's operation or governance, unless such a sale occurs during an event or in a venue wherein members of the public have been provided with equal notice and opportunity to purchase the object.
- Objects without intrinsic value may be discarded and/or destroyed by the Cultural Resources Manager and must be documented as such. Objects designated for destruction must in fact be destroyed, and shall not be retained by Museum staff or given to relatives, friends, or acquaintances. If discarded, any marks or labels identifying the object as Museum property shall be removed prior to disposal.

IV. LOANS

The Museum may loan objects from its collections, or accept loans of objects from other individuals or institutions, in a manner consistent with its established mission, purposes, and activities. A loan file will be kept regarding every object which is to be managed by the Cultural Resources Manager.

A. Criteria Governing Loans

The criteria for making or accepting loans of objects shall be the same as those used when considering objects for acquisition, except that:

- Legal title for objects loaned by the Museum shall remain with the Museum
- With respect to objects loaned to the Museum, the Museum shall establish to its satisfaction that the lender has clear title to the objects being loaned. Museum will maintain the object(s) in accordance with all applicable standards of care unless otherwise specified by lender

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- With respect to objects loaned by the Museum, the Museum shall establish to its satisfaction that the recipient is able to maintain the object(s) in accordance with all applicable standards of care

Terms & Conditions for Incoming/Outgoing Loans

All loans must be accompanied by a written incoming or outgoing Loan Agreement specifying the object(s) being loaned and establishing any terms and conditions agreed upon by the parties. Such terms and conditions shall include, but are not limited to:

- **Term:** Loans shall be made for a fixed term not to exceed one year. However, the parties may agree to renew a loan for an additional term. No permanent loans will be accepted. Any preexisting permanent or indefinite loans that have been accepted before this policy was in place will be subject to the updated policy, and all reasonable attempts will be made to return objects or seek legal ownership.
- **Insurance:** The loan agreement shall specify which party is responsible for insuring the object(s) being loaned, with a Certificate of Insurance available upon request.
- **Costs:** The loan agreement shall specify which party is responsible for any costs associated with transporting, storing, exhibiting, and/or maintaining the object(s) being loaned.
- **Photography & Reproduction:** Unless specifically denied in the loan agreement, the recipient of a loaned object is permitted to photograph the loaned object for educational or promotional purposes as long as FOM is properly credited, which shall be noted on the loan paperwork. Reproduction of a loaned object requires written permission.
- **NAGPRA:** With respect to objects subject to NAGPRA regulations, the lender shall be understood to have control of all applicable objects loaned, even while the borrower has custody of such objects. Subject to this principle, all parties shall be expected to comply with all applicable NAGPRA provisions.
- **Records:** The Museum shall maintain written records of all objects loaned by and/or to the Museum, including loan agreements, object photographs, and any associated documentation. A Standard Facility Report from the borrowing institution may be requested or provided upon request to ensure the safety of the borrowed object.

B. Incoming Loans

The Museum will normally borrow objects only for purposes of exhibition. Objects loaned to the Museum shall be maintained in the condition in which they are received and according to the Museum's standards of care at all times. Such objects are in the Museum's custody, unless the loan agreement explicitly provides otherwise.

If an object changes ownership (or if an individual lender dies) during the term of a loan, the Museum shall, once clear title to the object has been established, either make arrangements to return the object or execute a new loan agreement with the new owner.

If a lender fails to meet obligations or conditions associated with a loan or loaned object, the Museum may assess any reasonable fees necessary to cover the cost of storing and/or maintaining the object(s) involved, and may take appropriate legal measures to collect such fees if necessary.

The Cultural Resources Manager will process, renew, and track all incoming loans. The Cultural Resources Manager and appropriate staff will oversee packing, unpacking, pest control, insuring, and providing condition reports for all incoming loans. Condition reports should be completed within the first week of the objects' arrival.

C. Outgoing Loans

The Museum will normally loan objects from its permanent collections only to approved institutions for exhibition. Use of objects on the Museum's premises and under the supervision of Museum staff does not constitute a loan. To be eligible for lending, the object must be in good condition and able to withstand the stresses of travel, packing, climate changes, and handling. See the appropriate manual of practice for more detailed eligibility criteria.

Prior to any object from the collection leaving the Museum on loan, it must have its condition documented and be photographed (with date of photograph noted either in the frame or file name) in the case of an insurance claim.

V. UNDOCUMENTED OBJECTS AND MATERIALS

The Museum shall treat all abandoned and/or unclaimed materials in accordance with state and local laws, and shall turn over all such materials to proper authorities as required by law. In the event that abandoned or unclaimed materials are eventually determined to be the Museum's property, such materials shall be subject to the Museum's normal collections policies.

Undocumented Materials

In the event that undocumented objects are found to be part of the Museum's collections, they shall be accessioned into the collection using what information can be found. If the ownership of the object cannot be determined, reasonable efforts shall be made to determine the rightful ownership of such objects. If the ownership of the object(s) cannot be determined, the object(s) shall be evaluated for either acquisition or deaccession in accordance with this collections policy.

Note that for purposes of this policy, "found objects" are limited to objects already in the Museum's possession and control when discovered, and do not include objects left anonymously on or adjacent to the Museum's premises.

Unclaimed Materials

Unclaimed material loaned to the museum shall be treated in accordance with the Loans policy above. The Museum shall undertake reasonable efforts to return loaned objects to their lenders in accordance with the terms of the relevant loan(s). If the Museum is unable to return such objects, the object(s) shall be considered abandoned.

Abandoned Materials

The Museum shall make all reasonable efforts to return lost property and/or other objects left anonymously on or adjacent to the Museum's premises to their rightful owners. If the rightful owners cannot be located, the property and/or objects shall be considered unclaimed and treated to the policy outlined above.

VI. COLLECTION CARE

Collections care includes responsibility for both the physical condition and storage of

objects and their documentation. The Cultural Resources Manager shall preserve the Museum's artifacts, objects, and archival materials through adequately controlled storage conditions, and by treatment of degradable objects through professionally accepted techniques.

A. Collections Care Program

The goal of the collections care program is to ensure that objects are stored, handled, used, and exhibited in such a way that the long-term preservation of the objects is not compromised, and that objects are cared for according to current professional museum standards. All packing, shipping, handling, and moving of objects are to be done by trained staff, volunteers, or qualified designees approved by the Executive Director(s).

The Cultural Resources Manager is responsible for overseeing the care of collections, including the care of objects on loan to the Museum for exhibiting. The CRM and Cultural Resources Committee develop and implement policies and procedures, which provide guidelines for the preservation of the collections, and will maintain current knowledge regarding developments in the field of collections care. The CRM is also responsible for maintaining the security of collection environments on a daily basis. In the event of an emergency, the CRM shall respond to the emergency in accordance with the Emergency Preparedness Plan for Collections and Exhibits, as included in the Museum's Disaster Preparedness Plan.

Security

Security for all objects will be provided in accordance with all standard Museum practices whenever possible by the Museum. Storage spaces will be monitored regularly and locked when not in use. The entire building will be secured by an electronic security system when not in use by staff or public. In case of fire, a standard fire suppression system is located in appropriate places.

Environment

The Museum will provide a stable environment for the collection at all times within the limit of available facilities and monetary funds, barring natural disasters or other emergencies. Environmental control such as humidity and temperature will be monitored at appropriate intervals and maintained by HVAC museum standards. Exposure to light levels will be maintained and monitored to accepted museum standards within the Museum's ability and

requirements from lending organizations.

Integrated Pest Management

The Museum will take appropriate measures to safeguard its collections against damage inflicted by vermin or other infestation, in accordance with a plan of Integrated Pest Management (IPM). This plan will be formulated to comply with applicable local, state, and federal laws governing the use of dangerous or hazardous materials, and will include appropriate provisions for proper building maintenance and regular housekeeping. As such, all objects brought into the museum will be checked and monitored for pest infestation and damage. The use of living or dried plants shall be restricted to staff offices or staff common areas. Food and beverage is restricted in all archival and collection storage areas and is discouraged from use within exhibition space. All food and beverage related trash must be disposed in kitchen trash bins and should be removed from the building after special events.

B. Conservation

The Museum shall strive to meet the best standards of practice for conservation and interpretation of objects based on recognized national guidelines. Regular assessments of the Museum's conservation practices, such as the Conservation Assessment Program (CAP) and the Museum Assessment Program (MAP) will be sought through appropriate national organizations. The cost of conservation activities shall be identified and incorporated into annual budgets and financial plans, with due attention given to particular grants and donors as potential funding sources to cover these costs.

Preventive conservation is preferred to conservation treatment. When treatment is necessary, the goal is to preserve the object through the least intrusive means practicable. The Cultural Resources Committee must approve objects selected for conservation treatments and the Cultural Resources Manager will ensure proper documentation for justification and treatment of objects is recorded. Care shall be taken to maintain respect for the integrity of the object, the history of the object, and the reversibility of the treatment. Priorities for conservation treatment will be based on the following considerations:

- Historical significance
- Condition (i.e. actively deteriorating)
- Recommendation of conservator
- Request for exhibition

- Financial resources

VII. INSURANCE

The Five Oaks Museum collections shall be carried for a reasonable level of market value. Washington County provides Fine Arts coverage for the items owned by the County, which is in addition to Five Oaks Museum property insurance that also includes Fine Arts coverage.

Outgoing loans must be insured by the borrower. As needed, a Certificate of Insurance can be requested by the FOM before the objects are released for loan. Incoming loans and objects left for identification, exhibition, or consideration for the collection are insured by the FOM while on the premises.

Loss or damage of an object must be immediately reported to the Cultural Resources Manager and Executive Director(s) and in the case of an incoming loan, the lender. Should the loss or damage be the result of theft or vandalism, the Board president will also be notified. The Cultural Resources Manager is responsible for recording all incidents related to objects in the collection. If the Executive Director(s) or lender decides an insurance claim should be filed, the CRM shall contact the insurance company and process all documentation necessary in filing the claim; resulting records shall be kept in the object's file.

Risk Management

Risk management issues shall be addressed by FOM staff and brought to the attention of the Board. A Disaster Preparedness Plan is utilized by all staff. The Cultural Resources Manager is responsible for drafting and adhering to the portion of this plan dealing specifically with collections. The plan seeks to identify and then eliminate or reduce risks to:

- The Museum's visitors and personnel
- Its permanent collections
- Its building

VIII. DOCUMENTATION & COLLECTIONS RECORDS

All items that the Museum receives for potential addition to its Permanent Collections shall be documented according to professional standards. This policy outlines the types of records as well as the internal manuals that must be maintained for the collections.

Manuals of Practice

The museum shall maintain documentation of its record-keeping standards and practices, referring whenever possible to published professional standards. These manuals should be regularly maintained and updated. Museum staff and volunteers should consult the manuals for directions on how to create the records below.

Deeds of Gifts

For donations to the Permanent Collections, a Deed of Gift will be initiated by the Cultural Resources Manager. It should contain a statement that indicates ownership is fully transferred to the Museum and that the donor agrees the items may be integrated into existing collections or used in any way deemed fit by the Museum. All donations of items to the collection are considered outright and unrestricted gifts to be used for exhibition, educational and/or research purposes. Copies should go to the donor and originals placed in the Museum's Accession Files.

Accession Records

Upon receipt of new material for the Museum's permanent collections, the following records shall be created for each item or collection of items:

1. Accession Number: A unique number assigned to the transaction of the accession. (Note: the number identifies the transaction of accessioning the object/collection, not the individual object/collection itself. Refer to appropriate manual of practice for more detail.)
2. Accession Record: This electronic record describes the transaction of having received the object/collection, as well as a basic description of the collection/object, and other relevant metadata such as its location, condition, rights or restrictions. These records must be maintained in a database that is backed up according to professional standards.
3. Accession File: This paper-based record includes documentation about the accession

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that should be maintained permanently in physical format, if any. These must be housed in a secure location. Files should include: Original signed Deed of Gift (required, if applicable; see below) and any other legal documents; correspondence with the Donor regarding the accession; outgoing loan documents; appraisals; vendor descriptions; or other material of lasting value that describes the accession. Information that is fully represented in the electronic record need not be maintained on paper.

Incoming Loan Records

Upon initiating an incoming loan, a Loan Record shall be established. It should contain the same components as an Accession Record, i.e.: Loan Number, Loan Record, and Loan File.

Library Catalog Records

After being accessioned, records for books in the Museum's Library shall be added to its catalog, following standards and practices in the appropriate manual of practice.

Other Descriptive Records

Additional descriptive records may be created for items in the Museum's collections in order to improve discovery or tracking, such as finding aids for archival collections, descriptive records of digital surrogates, spreadsheets of non-museum collection materials, and so on. Professional standards for metadata creation should be used whenever possible, and practices for creating these records should be maintained in the manuals of practice.

Inventories

Inventories of the collections shall be conducted at regular intervals. Comprehensive inventories shall be ongoing until completed, then conducted every ten years thereafter. Spot check inventories shall be conducted once every two years. If collection objects appear to be missing when inventory records are reconciled, the Cultural Resources Manager will document this status in the object's record. Every effort, however, shall be made to locate the collection object.

Field Notes

Of special mention relating to collection records are field notes. These notes or copies on archival-quality paper are the property of the Museum and must be kept in the Archives at all times. They are invaluable records of actual specimens in the collection and cannot be

replaced. Every effort shall be taken to collect all the notes at the end of a field trip and maintain them for safekeeping. Under no circumstances should these archival copies be borrowed, loaned, or otherwise put in jeopardy.

IX. ACCESS

Providing both physical and intellectual public access to the collections is of primary importance in fulfilling the Museum's mission. Because the collections exist for the benefit of both present and future generations, a balance between use and preservation must be considered by museum staff when providing access. The Cultural Resources Manager grants approval for access to the collection and along with trained staff or volunteers, oversees outside visitors while engaging with the collection.

A. Use of Collections

Objects from the collection may be used for exhibition, research, and education. The Cultural Resources Manager will determine suitability of an object for use, dependent on the object's condition, availability, significance, and inherent risk. It is the Cultural Resources Manager's responsibility to ensure that an accessioned or loaned object is exhibited in a manner which follows accepted conservation practices. Permanent collection objects shall not be exhibited in individual offices or other non-public spaces.

The Museum recognizes a special responsibility as steward of historic and contemporary Native American objects. As a result of consultation with tribal representatives, the Museum periodically invites Native American spiritual leaders to perform a blessing of the collections and to address cultural concerns for care of the objects. The Museum adheres to the Protocols for Native American Archival Materials in efforts to protect culturally sensitive materials. (See Appendix C)

B. Rights & Reproduction

Fees

Access and use of collections may involve fees. Fees will be based on staff time and any associated costs for photocopying, reproduction, etc. The Cultural Resources Manager will maintain a current fee schedule and associated activities that shall be made publicly available on the Five Oaks Museum website and documented in the appropriate manual of practice.

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Copyright

Publication, reproduction, or replication of any item from the Museum's collection requires written permission from the Cultural Resources Manager, except when such reproduction is permitted under Fair Use. Permission also may be required from the copyright holder, if the copyright is not held by the Museum. In addition, no commercial or promotional use of the Museum's permanent collections will be allowed unless specific approval in writing is granted by the Cultural Resources Manager. Guidelines for approving commercial reproduction requests can be found in the appropriate manual of practice. A more detailed copyright policy will be published and maintained on the FOM website.

Copies of Museum illustrative material, photographs, archival material, and artwork require the execution of a Photograph Reproduction Order Form, which includes appropriate use and credit agreements.

Requests for loan or reproduction of materials, documentation, or technical assistance from communities and cultural groups from which objects have been acquired will receive special consideration, and every reasonable effort will be made to honor such requests.

Public Records

Five Oaks Museum holds public records from Washington County in its custody. These records are accessible to the public following standard access protocol and are free of cost to reproduce unless otherwise specified. FOM complies with all Freedom of Information Act requirements.

Photography & Filming

Photography of objects on display is permitted for personal use, using handheld cameras with no flash. Use of tripods, flash, or other specialized equipment requires approval from the Cultural Resources Manager. Photography of objects not on display requires advance written request and approval from the Cultural Resources Manager.

C. Public Access

FOM encourages the general public to use its collections and provides access for persons with a genuine interest in research. However, access for research purposes will be carefully considered and granted when such use is not in conflict with respectful and appropriate

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treatment of the materials. The Museum provides only onsite access to its collections, except for approved outgoing loans to qualified institutions or for conservation treatments.

Researchers must agree that the Museum will receive proper credit in any publication, film, or other media resulting from research using its collections. All duplication is at the discretion of the Five Oaks Museum and is to be performed by trained staff only.

The Museum reserves the right to deny any researcher access to its collections for the following reasons:

- To prevent the deterioration, mutilation, loss or dislocation of artifacts and/or archival material
- The research will require excessive costs in terms of staff efforts or use of facilities
- The researcher compromises security of the collections and/or facilities
- The researcher has a history of disorderly or disruptive conduct, or does not agree to follow posted research procedures

Volunteer & Intern Access

All volunteers and interns involved with the collection are trained in the proper procedures for handling objects and archival materials prior to beginning work. Only the Cultural Resources Manager may grant permission for a volunteer or intern to be in the collections areas.

Restrictions

The following restrictions are imposed on the disclosure of information about the collections:

- Collections are available to study under normal Museum security procedures
- Public access to culturally sensitive materials is restricted. All reasonable efforts will be made to honor requests for access to culturally affiliated groups or individuals
- Access for state or federally recognized tribes to cultural items contained in the collection and subject to NAGPRA will be under the supervision of the Cultural Resources Manager and Executive Director(s)
- All personal information about donors is confidential. If a donor requests anonymity the request must be honored. Access to all or part of a collection may be restricted

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by the donor for a finite number of years because of sensitive nature of its contents

Use of Gallery Space

Use of Museum gallery space is restricted to approved museum functions and events per the Executive Director(s). All events must be applicable within the Museum's mission. Use of the gallery and adjoining spaces must not result in permanent alterations to the grounds or structure. The space must be returned to its prior condition after use and the user will be responsible for all cleaning and repairs. An appointed staff representative must be present during the duration of the activity.

Commercial media productions must not distort the purposes or historical integrity of the Museum or its collections. No object, exhibition, or structure will be used in promotion of a product or service that implies endorsement by Five Oaks Museum.

Destructive Sampling

The goal of keeping an accessioned and/or prepared specimens collections is to advance the knowledge of them in their particular field. There are occasions where advancement of knowledge will mean destruction of part or all of a prepared specimen. It is up to the Cultural Resources Committee to determine when it is worth destruction of material for the advancement of knowledge. The Executive Director(s) provides final approval after the Committee determines the object worthy of destruction.

X. CODE OF ETHICS

Five Oaks Museum is committed to maintaining the highest professional standards in managing, housing, securing, conserving, and documenting its collections. FOM conforms to all moral, legal, and ethical codes which govern museums.

A. Ethics of Collecting

FOM will not knowingly accept any artifact illegally imported or collected in the United States or whose acquisition would encourage illegal traffic or damage to cultures and natural or archaeological sites. FOM will not collect objects or archival material with unsatisfactory or questionable provenance.

FOM conforms to the American Alliance of Museums (AAM) Code of Ethics with specific

reference, in the context of this policy, to its guidelines on individual collecting, disclosure of personal collecting, dealing, accessioning and deaccessioning, and appraisals. In addition, FOM adheres to the AAM's Code of Ethics for Curators approved in 2009.

B. NAGPRA

FOM also complies with applicable local, state, and federal laws, such as Native American Graves Protection and Repatriation Act (NAGPRA) of 1990. The Museum also adheres to the Copyright Law of the United States, Title 17 Code, which governs the making of photocopies or other reproductions of copyrighted material. The Museum adheres to the Protocols for Native American Archival Materials in efforts to protect culturally sensitive materials.

C. Personal Collecting

All staff members and representatives of FOM will not compete with the museum's collecting activities and will conduct their personal collecting activity in an ethical manner. As such, staff, representatives, and volunteers are prohibited from acquiring collections that have been deaccessioned from FOM.

The Museum affiliation cannot be used to promote personal collecting activities. As such, museum supplies, equipment, and paid staff time cannot be devoted to private collections.

Personal collections will not be stored on museum premises for non-museum related purposes. Personal collections will only be allowed on the museum premises for the following purposes: gift approval, special exhibitions, display, and study. Objects or archival material must be kept in the designated storage areas. The museum will not insure collections brought onto the premises for study or decoration.

D. Professional Relationships

Employees or representatives of FOM should not use their title or affiliation to derive any profit or gain (including personal favors, gifts, or commissions) directly or indirectly from vendors, private collectors, lenders, borrowers, donors, or any business associated with FOM. No FOM employee shall use their position to disadvantage the Museum to the advantage of another entity, person, or organization.

XI. POLICY REVIEW & REVISION

Review

Review of the Collections Management Policy is necessary to maintain its validity and usefulness as guidance for staff and the Board of Directors. The entire policy will undergo a thorough review once every five years or sooner if a major problem arises.

Revision

When considering changes or additions current AAM guidelines will be adhered to. Any revisions proposed by the Cultural Resources Manager are reviewed by the Cultural Resources Committee. When approved, the revised Collections Management Policy is presented to the Board of Directors and Washington County for final approval.

XII. Appendix A – Glossary & Definitions

Accession: the formal process used to accept and record an object as part of the permanent collections. The object may be donated, purchased, exchanged, or acquired by any other transaction whereby it formally becomes the legal property of the Museum.

Appraisal: the assignment of a monetary value to an object by a qualified appraiser.

Associated Records: all documentation generated by the activity of collecting, analyzing and preserving objects: i.e., catalog worksheets, object inventory sheets, condition reports, treatment records and any form of object documentation.

Conservation: scientific examination and treatment of museum objects and the study of the effects of the environment in which they are placed.

Deaccession: To remove an object from a museum's permanent collection.

Disposal: the process of physically divesting the Museum of an object in its possession in accordance with the Collections Management Policy.

Donor: an individual who has signed over title of ownership of objects to the Museum.

Donor Agreement: a contract that transfers title of ownership of an object or objects from a donor to the Museum.

Incoming Loan: the temporary transfer of collection objects from another museum, institution or individual to the Museum for stated museum purposes. The transfer does not involve a change of ownership.

Non-Museum Holdings: a class of objects (i.e., library books, education use-a-facts) which are not accessioned as part of the permanent collections, but support research and/or

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interpretive purposes. Such objects may be donated, purchased, exchanged, or acquired by any other transaction whereby they formally become the legal property of the Museum.

Object History: the documentation of the activity pertaining to an object while it is in the Museum's control.

Official Records: the original records transferring ownership of objects to the museum.

Outgoing Loan: the temporary transfer of collection objects from the Museum to another museum, institution or individual for stated museum purposes. The transfer does not involve a change of ownership.

Permanent Collections: a group of objects which have been selected, in accordance with the Museum's mission and accession policy, by means of a formal process. The Museum holds legal title to the permanent collections and they are held in public trust.

Preservation: action taken to retard or prevent deterioration of or damage to objects by control of their environment and/or treatment of their structure in order to maintain them as nearly as possible in an unchanging state.

Provenance: the chronology of the ownership, custody or location of a historical object.

Provisional Deposit: any object deposited with the museum for consideration as a potential donation or purchase for the Museum's purposes.

Registration: the process of developing and maintaining a permanent means of identifying an object for which the institution has permanently or temporarily assumed responsibility.

XIII. Appendix B – Washington County Agreement

[See attached]

XIV. Appendix C – Protocols for Native American Archival Materials

[See attached]