

#29
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MEMORANDUM

Community Services Department CS09-288

DATE: JUNE 11, 2009

TO: MAYOR AND COUNCIL

THRU: W. MARK PENTZ, CITY MANAGER 
RICH DLUGAS, ASSISTANT CITY MANAGER
MARK M. EYNATTEN, COMMUNITY SERVICES DIRECTOR 

FROM: JODY CRAGO, MUSEUM ADMINISTRATOR 

SUBJECT: Approval of a Museum Collection Policy

RECOMMENDED MOTION: Approve the Museum Collection Policy as the methodology for the acquisition, care and potential deaccession of objects held by the new museum.

BACKGROUND: A museum collection policy is the document that governs the acquisition, care, and potential deaccession of objects held by the museum. It also acts as a guide for the staff and source of information for the public regarding how the objects in the museum are taken care of and handled. The need for this document arises because the City of Chandler will be accepting ownership of objects for the new Chandler museum. The act of collecting objects as a public entity creates a public trust because the museum will hold these collection objects for the benefit of those for whom they serve. The act of collection also creates a fiduciary responsibility to care for the objects that the museum collects. Collection policies are also a requirement for American Association of Museums (AAM) Accreditation, a goal for the new museum.

The recommended Chandler Museum Collection Policy was based on the policy of an AAM accredited museum. Currently, the Chandler Historical Society (CHS) also has a collections policy that governs their collection. The attached policy is designed to work in concert with the CHS policy to ensure a timely and efficient transfer of collections from CHS to the new museum.

This policy will cover materials collected for all portions of the Museum Division including the Chandler museum, McCullough- Price House, Tumbleweed Ranch, and the Public History Program. It establishes the authority for the museum staff to collect history, art, and cultural materials related to the Chandler area from prehistory to the present. It creates strict policies for how and when material is removed from

the collection, as well as the restrictions on the proceeds derived from removing things from the collection.

The policy has been reviewed and recommended for approval by the Museum Advisory Board. The Community Services Subcommittee reviewed the document on May 19, 2009. The policy has also been presented to the Chandler Historical Society Board.

Chandler Museum's



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Collection Policy

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I. Institutional History

In 1969, a group of concerned Chandler citizens formed the Chandler Historical Society to preserve the city's history. The volunteer organization began collecting objects in an effort to preserve the history of Chandler. They exhibited these objects in a building on West Chicago Street leased from the City of Chandler that had once housed the Chandler Fire Department. For seventeen years, the Chandler Historical Society operated the Chandler Museum seasonally, opening to the public in late spring and staying open through the summer into the fall. The Historical Society continued to collect through this time period.

In 1986, the Chandler Historical Society hired its first professional staff member, a Curator named Scott Solliday. Mr. Solliday set about the business of trying to sort out and document 17 years worth of undocumented collecting. He applied the first accession numbers to the collection, and rather than trying to assign accession numbers based on the years the objects arrived in the museum he began with accession number 86-1. Therefore, 86-1 is the earliest recorded accession number in the collection despite the fact that some materials in the collection arrived at the museum before 1986. In addition to assigning accession numbers, Mr. Solliday went about setting up a system for documenting future incoming acquisitions according to professional museum standards at the time.

After several years Mr. Solliday left, and a new staff member, Al Wiatr, came aboard. For several reasons documentation once again became lax, and many donations were either undocumented or mixed in with other collections. This state of affairs continued for several years, until 2003 when a Volunteer Collections Manager, Col. John Johnson, was brought on board. Col. Johnson spent five years attempting to sort out problems created by lax documentation and collections management practices, and brought the museum into modern practice by purchasing the Museum's first collections management software, PastPerfect. Col. Johnson also made a conscious effort to get proper documentation for all accessions. This involved searching out and contacting known donors. Care of the collections remained the responsibility of the Volunteer Collections Manager, with the assistance of the professional staff, until the City of Chandler took over operations of the Museum in August, 2008. At this time, a professional Curator of Collections employed by the City was hired to oversee the Chandler Historical Society's collection and its management.

When the City took over operations of the museum, the Museum Agreement between the City and the Chandler Historical Society stipulated that the Museum's collection would remain in the ownership and care of the Chandler Historical Society but that within six months of the execution of the Museum Agreement both sides would start working towards transferring ownership of the collection to the City. The drafting and adoption of this Collection Policy for the City of Chandler is the first step towards the transfer of ownership of the collection.

II. Mission Statement:

The Chandler Museums are innovative learning environments where our community comes together to share stories, store our cultural heritage and experience Chandler as a people and a place.

III. Vision Statement:

The Chandler Museums seek to be the principle resource for our community to explore its people's history and culture and its place in the rapidly changing world of today.

IV. Core Values

- **History matters:** People are enriched and empowered by an appreciation and understanding of their history and culture. Understanding history and culture increases mutual respect and enables communities to celebrate diversity. Knowing history and its many lessons enables people to formulate good questions, grapple with the present, and shape the future. We will facilitate public recollection of the past, evaluation of the choices made by others, and discuss the consequences of those choices. We will use these processes to encourage generations to consider their own legacy, with an imperative to overcome burdens of the past, build upon all legacies, and thus improve the prospects of those who will one day stand in our place.
- **Public Learning:** Unlike schooling, learning in a museum is self-motivated, self-directed, and can be lifelong. Unlike print and electronic media, information in museums is communicated primarily through real, tangible objects. This learning usually takes place during leisure time and without the direction of a teacher. To stimulate a public sense of inquiry, curiosity and delight, our exhibits and programs are not only informative, but also entertaining and inspiring. They should meet the needs of many different audiences, from amateurs to experts, and support different learning styles through touch, feel, vision, sound, and movement. We focus on critical historical and cultural issues that are engaging and relevant to the public's daily lives and civic responsibilities. We must be a vital educational and recreational destination for both our local and worldwide communities.
- **Empathy:** The Museum will facilitate experiences that encourage people to consider the world from the perspective of others. We know that all humans, in every place and every time, share a humanity that makes us more alike than different. Empathy allows us to imagine the thoughts and feelings of others and it is this faculty that makes the past knowable and the feelings of others comprehensible. Empathy connects us to the people in the past and facilitates mutual understanding in the present. Without empathy, the past is unintelligible.
- **Inclusive:** Common stories and shared meanings cannot evolve from exclusive practices and programs. Museums are places to make connections between groups, regions, ethnicities and generations. Inclusive means accepting multiple kinds of authenticity and affirming and acknowledging the community's sense of self and expertise. Our Museum and its programs can present multiple perspectives and thereby encourage people to develop their own opinions and make their own meanings. Our programs should and can celebrate what is unique about our guests and make people feel welcomed and validated. The Chandler Museum will seek diverse public representation in program planning and implementation.
- **Collaborative:** Collaboration requires shared vision, resources, and implementation. We must work closely with neighboring schools, colleges, universities and research institutions to strengthen the quality and effectiveness of our public learning. We need to collaborate with other museums, environmental, cultural and recreational groups and organizations to fulfill our educational mission. The Museum has an obligation to seek out and collaborate with as many groups as possible to augment our efforts with the skills, resources, and expertise of others, and hence expand the impact of our work.
- **Interactivity:** The Chandler Museums offer moments of discovery through hands-on and minds-on informal learning experiences, allowing visitors to connect and discover through experimentation. These experiences are social and vary in scale and purpose. We encourage

- our guests, volunteers, trustees, and staff to learn through exhibits and programs that are participatory and active.
- **Stewardship:** Preserving Chandler’s history is a forward-looking effort undertaken on behalf of the future generations. The Chandler Museum’s collections are its most important assets. These collections are our physical link to the past and the raw material from which we construct our stories, examine the past, and frame the future. We will be good stewards and trustees of this legacy and care for it in a professional manner.
 - **Excellence and Integrity:** A journey of continuous improvement is defined not by us but by our guests. It’s about being satisfied with accomplishments but recognizing that there is more to be done. It’s about learning from our mistakes; never being defeated by them. It’s about removing the idea of “good enough” and replacing it with “what’s next.” It’s about growth when one wasn’t aware that growth was possible. It’s about extending our reach, to grasp unknown horizons. It’s about upholding the highest museum standards. It’s about weaving these beliefs into our programs, exhibits, and people.

V. Authority

The Chandler Museum is operated as a division of the City of Chandler Community Services Department; however, the City Manager shall have the authority to reassign the Museum's operational placement and chain of command within the City's organizational structure. The Chandler City Council shall act as the governance body for Chandler Museum. The Museum Advisory Board shall act as the advisory body for Chandler City Council and the Museum Administrator regarding policy and strategic planning for the Chandler Museum.

The Chandler City Council delegates, through the City Manager and the Director of Community Services to the Museum Administrator, the full responsibility for the day-to-day operation and management of the Chandler Museum and shall allocate resources sufficient to operate the museum effectively. Functionally, the Museum Administrator is the chief executive officer of the Chandler Museum with responsibilities including, but not limited to hiring and firing staff; executing the Chandler Museum's budget; implementing Chandler Museum policies; the creation, acquisition, management, and deaccession of a Chandler Museum Collection; and managing Chandler Museum programs and staff.

From time to time, the Chandler Museum staff may encounter a situation which this collection policy fails to provide adequate guidance for resolution. In such an instance, Museum staff must first seek approval for a proposed course of action from the Museums Advisory Board and the City Council before taking action to resolve the issue.

VI. Categories of Collections:

Permanent Collections

The Chandler Museums are dedicated to serve as a learning environment for the community about the history and culture of Chandler, Arizona. The Museums believe that objects, images, text and stories provide a unique understanding of this history. To pursue this goal, the Museums acquire, preserve, interpret, and exhibit permanent collections that represent the social, cultural, economic, art and natural history of Chandler. The Permanent Collection shall include three-dimensional, archival, book, and photographic materials that illustrate this history and culture and support the mission of the Museums. The Museums acquire these diverse collections as primary documentation of the story of Chandler's history and culture. Materials in the Permanent Collection receive all the proper care according to the highest museum standards set forth by the American Association of Museums. The Permanent Collection is overseen by the Curator of Collections.

Education Collection

The Museums' dedication to learning is reflected not only in displays and exhibitions but also in its numerous offerings in classes, workshops and programs. To facilitate these public offerings, the Museums maintain an education collection of commonly found, easily replaceable objects and reproductions to enhance the learning experience of participants in these programs. These Education Collection objects are collected to encourage better understanding of educational concepts and ideas by offering a hands-on interaction with objects from the past. This interaction takes place as part of programs offered by the Museums and objects are selected for both their evocative qualities and their ability to withstand a level of handling not permitted with objects from the permanent collections. The Education Collection is overseen by the Curator of Education.

Research Collections

The Museums also maintain a research collection of source materials to provide local history services to City residents, museum staff, scholars, businesses, organizations, and other members of the general public interested in the history and culture of Chandler. The Research Collection is comprised of books, reproductions of archival and photographic materials from the Permanent Collection, newspaper clippings, non-historic ephemera, and other non-historical items which could be useful to researchers. The Research Collection also houses the Chandler Historical Society and institutional archives for the Museums. The Research Collection is overseen by the Curator of Collections.

Loan Collections

From time to time it may be necessary or desirable to enter into a loan agreement with an individual or institution for the purposes of exhibition or research. The Chandler Museums' Loan Collections are comprised of both incoming and outgoing temporary loans. Incoming loans are historically or culturally pertinent three dimensional objects, archival materials, photographs, and books which are borrowed by the Museums for a specific purpose (i.e. exhibits, research, identification) from individuals, businesses, or other collecting institutions which support the mission of the Chandler Museums. Incoming loans are returned to their owners after the exhibition or research is complete. No permanent incoming loans will be accepted by the Museums. Outgoing loans are historically or culturally pertinent three dimensional objects, archival materials, photographs, and books from the Chandler Museums' Permanent Collection to other collecting institutions for exhibit or research purposes. The Loan Collections are overseen by the Curator of Collections.

Exhibit Prop Collection

The Chandler Museums will have cause, from time to time, to acquire, by purchase, donation, manufacture, or other means, props to be used in exhibits. Props are items which enhance the quality of exhibits, and can be either reproductions or historic items lacking provenance or a place in the Permanent Collection. Until an Exhibit Coordinator (or similar position) is hired, the Exhibit Prop Collection is overseen by the Exhibits Committee.

Living Collections

The Museums' Living Collections include live animals and plants to be used for educational purposes, and are specific to operations at Tumbleweed Ranch. The Living Collections will be comprised of plant-life at the Ranch (including, but not limited to, agricultural plants, but not including general park landscaping) and animals (including, but not limited to, chickens, horses, sheep, cattle) living at the Ranch. Currently, two goats, a pot bellied pig, chickens, and a donkey reside at the Ranch. Care for the Living Collections will be kept at the highest standards as prescribed by the Association of Zoos and Aquariums and the American Public Gardens Association.

Digital Collection

The Chandler Museums' Digital Collection is comprised of digital materials documenting the history and culture of Chandler. The Digital Collection contains digital versions and metadata of the Permanent Collection, in addition to other digital resources, including, but not limited to, online databases, audio, video, oral histories, recordings of meetings, and photographs. The Digital Collection is a part of the Research Collection, and is accessible to all people allowed access to the Research Collection. This collection is overseen by the Public History Coordinator.

VII. Scope Of Collection

The Museums' Permanent Collection and the Museums' interpretations of that collection shall focus on materials from the Chandler area dating from prehistory up to and including the present. The Chandler area includes, but is not limited to, today's City limits, the original Chandler Ranch, Chandler Heights, Goodyear/Ocotillo, Frank Lloyd Wright's Ocotillo Camp, Kyrene, Williams Air Force Base, Pueblo Alto/Hightown and other communities and geographic areas heavily involved in or associated with the history and culture of Chandler.

Limitations of Scope

Although the Museums are interested in Chandler history and culture universally, its policy is to limit the scope of all of its collections to several key areas:

- All materials must be suitable for public display, research, and/or loan, and must fulfill the Museums' educational objectives as defined by its Mission Statement.
- The Museums collect, catalog, exhibit, and borrow only those materials that they are able to care for, store, and exhibit in a manner consistent with its educational purpose and with generally accepted museum practices.

The Museums' Scope of Collections is further limited to materials from the following categories:

- Materials with documentable histories/stories associated to Chandler people, places, or events.
- Materials documenting the unique aspects of life in Chandler.
- Materials demonstrating the similarities and differences of the lifestyles of past residents with those of the present.
- Materials representing the many diverse communities, both geographic and cultural, which make up Chandler in the past and present.
- Materials that document the changing physical environment of Chandler as it has developed throughout its history.
- Materials documenting the changing economy of Chandler as it relates to the region, state, and nation throughout its history
- Materials of art, literature, music, natural history, and architecture with a related social or cultural significance to Chandler.
- Materials demonstrating widespread regional, state, or national trends that affect Chandler.
- Materials serving as source materials that aid in the study of Chandler history.

When the Museums are offered materials that are outside its scope of collections and/or its ability to care for the material, they will assist the owner in locating an appropriate organization to receive the materials.

VIII. The Permanent Collection

The Chandler Museums maintain four types of permanent collections.

1. **Object Collection**
2. **Archival Collection**
3. **Book Collection**
4. **Photograph Collection**

Object Collection

The Object Collection consists of three-dimensional materials acquired by the Museums for preservation, interpretation, exhibition, and scholarly research purposes in fulfillment of the Museums' mission and vision. The Curator of Collections is responsible for the care and management of the Object Collection including acquiring, identifying, cataloging, storing, conserving, and recommending objects for deaccession from the collection. The movement and condition of these objects should be tracked whenever they are removed from their storage location, which shall be documented at all times.

The Object Collection consists of, but is not limited to:

- A. **Household:** Objects representing home life in Chandler, including furnishings, tools, appliances, and decorative objects from prehistory to the present.
- B. **Personal:** Clothing, toiletries, adornment, and personal belongings from the people of Chandler representing area lifestyles and tastes from prehistory to the present.
- C. **Work:** Objects produced by or used in the operations of business, industry, and government of Chandler from prehistory to the present.
- D. **Military:** Objects comprising weapons, uniforms and adornment from American armed conflicts from prehistory to the present, particularly of Chandler participants.
- E. **Farming:** Agricultural machinery, implements, and tools of Chandler from prehistory to the present.
- F. **Art:** Art reflecting or representing the social and cultural history of Chandler and its people. This includes artwork by local artists and folk-art reflecting or representing the traditional crafts of Chandler.
- G. **Architecture:** Pieces or components of Chandler buildings with social or cultural significance to Chandler history.
- H. **Social:** Objects representing the social life of Chandler residents
- I. **Religion:** Objects representing the religious ceremonies and beliefs of Chandler residents

Archival Collection

The Archival Collection consists primarily of two-dimensional materials such as, but not limited to, documents, paper ephemera, periodicals, and manuscripts that document the history and culture of Chandler. These materials are acquired by the Museums for preservation, interpretation, exhibition, and scholarly research purposes in fulfillment of the Museums' mission and vision. This collection serves as historic source materials which provide useful information for the study of Chandler history and culture by the public and Museums. The Curator of Collections is responsible for the care and management of the Archival Collection, including acquiring, identifying, cataloging, storing, conserving, providing public access, making reproductions, and recommending objects for deaccession from the collection.

The Archival Collection consists of, but is not limited to:

- A. Personal correspondence relating to people and events in Chandler, including military and travel experiences of Chandler residents.
- B. Business records of Chandler businesses, particularly correspondence, ledger books, daybooks, journals, and product advertising, including but not limited to matchbooks, advertisements in print media, and coupons.
- C. Manuscripts relating to Chandler history or written by residents, including reminiscences, diaries, family histories, and accounts of Chandler.
- D. Club records of Chandler organizations, including correspondence, yearbooks, programs, minutes, and membership lists.
- E. Maps of Chandler municipalities, townships, roads, surveys, topographical features, subdivisions, and plats, as well as general maps of Arizona.
- F. Architectural plans and elevations of residential, government, and commercial structures of Chandler, including those plans which never came to fruition.
- G. Printed ephemera produced by and for Chandler businesses, schools, organizations, and political campaigns, including flyers, cards, brochures, booklets, posters, and pamphlets.
- H. Periodicals of local businesses, including newspapers, newsletters, and magazines.
- I. Representative samples of nationally distributed newspapers and magazines to support the analysis and interpretation of the Museum's object collection and significant national historical events.
- J. Ephemera that documents and provides for contextual reference of collections and events affecting Chandler.

- K. Sound, video, and digital recordings of interviews with or about local people and local events.
- L. Sample materials of Chandler musical, stage, television, and film performers.
- M. Representative samples of nationally distributed musical forms such as, but not limited to: blues, jazz, classical, county western, opera, and rock and roll to support the analysis and interpretation of the Museum's object collection and significant national historical events.
- N. Microform, including microfilm and microfiche, of local records, newspapers, and federal and state records relating to Chandler. This includes microform copies of archival materials of local interest held in other repositories.
- O. Records documenting the government of Chandler including national, state, and local resolutions, tax receipts, licenses, permits, and various departmental records.

Book Collection

The Book Collection consists of a non-circulating collection of printed and bound works relating to the history of Chandler acquired by the Museums for preservation, interpretation, exhibition, and scholarly research purposes in fulfillment of the Museum's mission and vision. This collection maintains books, booklets, and bound periodicals needed for the study of Chandler history from prehistory to the present for the public and Museum staff use. The Curator of Collections is responsible for the care and management of the Book Collection, including identifying, acquiring, cataloging, storing, conserving, providing public access, and recommending objects for deaccession from the collection.

This collection consists of, but is not limited to:

- A. Local histories, including all historical works concerning Chandler communities, individuals, businesses, institutions, and organizations.
- B. Published genealogical works of Chandler families, vital and census records, cemetery and church publications.
- C. Primary resources on material and popular culture, intellectual, technical, and social history, which support the analysis and interpretation of the Museum's Object and Archival Collections and significant national historical events. This includes catalogs, cookbooks, works on etiquette, housekeeping, architecture, art, family care, folklore, medicine, military, education, and transportation.
- D. Directories and yearbooks of Chandler, rural residents, schools, professional groups, social groups, and religious organizations of Chandler.
- E. Works on any subject, fiction or non-fiction, written by Chandler residents.

- F. Works reflecting the educational development of the Chandler area, including a sampling of published works written by faculty and students.
- G. General reference works including dictionaries, encyclopedias, atlases, and specialized works, like historical and biographical dictionaries, that feature Chandler or its residents.
- H. A sampling of period histories needed for contextual reference of collections. This includes events and trends directly affecting Chandler (e.g. native peoples' experiences, western settlement, wars, national centennial celebrations, depression era work programs, etc.)
- I. Military histories and histories of units in which Chandler residents served, and Williams Air Force Base.
- J. Biographies, compendiums, and individual works that feature Chandler residents.
- K. Religious works and sermons written by or delivered in Chandler, hymnals used by various religious sects in Chandler, historical works on religion practiced in Chandler which reference Chandler, samples of missals, prayer books, bibles, or other texts representing the various religions practiced in Chandler from prehistory to the present.
- L. Works on irrigation technology in Arizona from prehistory to the present, U.S. Department of Agriculture yearbooks, State of Arizona agricultural publications, agricultural publications, and other works referencing practices and technologies of agriculture relevant to Chandler.
- M. Work by and about native peoples of the Chandler area that document all aspects of their culture and history.

Photograph Collection

The Photograph Collection consists of historic photographs, modern and reproduction prints, transparencies, negatives, and digital images that have been acquired by the Museums for preservation, interpretation, and scholarly research purposes in fulfillment of the Museums' mission and vision. This collection is maintained for the public and Museum staff use and serves as a visual record of Chandler. The Curator of Collections is responsible for the care and management of the Photograph Collection, including identifying, acquiring, cataloging, storing, conserving, providing public access, and recommending objects for deaccession from the collection.

The Photograph Collection consists of, but is not limited to:

- A. Portraits and candid shots of Chandler residents.
- B. Photographs of Chandler buildings, streets, roads, and other locations.

- C. Photographs of Chandler activities and events.
- D. Aerial photographs of Chandler.
- E. Art photography, photojournalism, and family and personal photography taken by Chandler residents.
- F. Photographs of regional, state or national figures that have affected the social or cultural history of Chandler.
- G. Photographs of regional, state or national locations and events that have affected the social or cultural history of Chandler.
- J. Photographs to support the analysis and interpretation of the Museum's object collection.

IX. Education Collection

The Education Collection consists of commonly found, easily replaceable objects and reproductions. The Education Collection materials are collected to encourage better understanding of educational concepts and ideas by offering a hands-on interaction with objects from the past. Education Collection materials may be acquired through purchase, transfer, donation, manufacture, or other means. These objects are selected for both their evocative qualities and their ability to withstand a level of handling not permitted with objects from the permanent collections. Education Collection materials differ from Permanent Collection materials in that they are not formally accessioned; they are expected to be handled by instructor and students, and a certain amount of wear and tear, or even their eventual destruction, is to be expected. The Education Collection also includes reproductions or copies of original artifacts. All reproductions will be well-researched, accurate representations of the originals. The Education Collection objects are in the custody of Education staff. They are not insured and their day-to-day transportation within the Museums is not recorded. On occasion materials from the Education Collection may be loaned as part of an outreach program. These loaned materials will be documented as to where they go, their condition before being loaned, and their condition upon return. The Curator of Education maintains the records of materials loaned from the Education Collection. Materials in this collection depend on the educational offerings the Museums are presenting, and may be disposed at any time at the discretion of the Curator of Education. Donors to this collection are informed in writing about its hands-on nature and the possibility that the object may eventually wear out and be disposed.

X. Research Collection

The Museums' Research Collection consists of two dimensional paper reproductions, photocopies, or duplicates of materials in the Museums' Permanent Collection, materials from other collecting institutions, or private collectors, microfilm or fiche materials, web-based materials, digital media, and books which are made available to the public for research purposes. Researchers are required to make an appointment with the Curator of Collections to use the Research Collection. The researcher, with the consent of the Curator of Collections, may create reproductions. No part of the Research Collection may leave the Museums.

Institutional Archives

The Institutional Archives consist of three-dimensional, archival, book, and photographic material which document the history, practices, procedures, and collections of the Chandler Museums, their predecessor organization, the Chandler Historical Society, and the City of Chandler Public History Department. This collection maintains materials used in interpreting the history of the organization, documenting the source of Museum collections, explicating previous interpretation of Chandler history, and future strategic planning of the organization for staff use. The Curator is responsible for the care and management of the Institutional Archives including acquiring, identifying, cataloging, storing, conserving, providing public access, making reproductions, and recommending retention schedules for the materials that make up the collection.

The Institutional Archives consist of, but are not limited to:

- A. Publicity of Museum activities and events, including flyers, cards, brochures, booklets, posters, and pamphlets.
- B. Manuscripts, presentations, and notes of staff regarding interpretations of Chandler history.
- C. Examples of Museum educational programs and resources.
- D. A sample of archival material produced by staff in the normal operation of the organization.
- E. Materials documenting Museum activities, programs, and exhibits.
- F. Materials documenting the staff, interns, and volunteers of the Museum and their activities as related to the Museum.
- G. Materials documenting Chandler Historical Society activities and events, including flyers, cards, brochures, booklets, posters, and pamphlets.

XI. Loan Collection

To achieve their educational goals, the Chandler Museums may from time to time loan materials from its collections to museums, historical societies, or other cultural institutions, which in the Museums' judgment, can comply with the conditions set forth in the loan agreement. Similarly, the Museums may accept objects on a temporary basis from other institutions or individuals to fulfill an exhibition or study requirement. The Curator of Collections is responsible for documenting and retaining records of all incoming and outgoing loans from collections. The Chandler Museums will not loan or accept the loan of objects for unspecified periods of time; therefore there will be no "permanent loans."

All loans, whether incoming or outgoing, will be processed using one of the Museums' Loan Agreement forms (Appendix A) and signed by both the lender and the borrower. These forms specify the terms and period of the loan, the value of the object (as assessed by the owner), the condition of the object, and the purpose of the loan.

Conditions

Following are general conditions for incoming and outgoing loans:

- A. The loan shall be in the best interests of the Museums, the public they serve, the public trust that they represent in owning collections, and the scholarly or cultural communities that they represent.
- B. The loan shall advance the Museums' purposes and not any private for-profit interests.
- C. Items that are loaned shall be used only for the purposes stated in the loan agreement.
- D. Outgoing loans will be made only after receipt of a formal request on official letterhead from the borrowing institution. Loan requests must be received a minimum of 30 days prior to a lending date.
- E. All loans are subject to recall upon written request if conditions of loan agreement are not followed.

Incoming Loans

Following are specific terms for incoming loans:

- A. If ownership of a borrowed object should change during the period of the loan, the new owner is required to establish ownership of the object by proof satisfactory to the Museums. Furthermore, if loan conditions change the Curator of Collections will evaluate the possibility of a loan continuance on a case-by-case basis.
- B. The Chandler Museums will provide the same care for borrowed objects as it would towards objects in its collections.
- C. The Museums will not undertake restoration, cleaning, or repair of borrowed objects without express written permission of the lender.

- D. Condition reports will be made at the time borrowed objects are received and returned.
- F. Unless otherwise notified in writing, the Museums will release borrowed objects only to the lender or the lender's agent. If the Museum's effort to return the object is unsuccessful, the object will be placed into storage 90 days after the loan has expired. The Museums may acquire title to the object considered "abandoned" as provided in the statutes of the State of Arizona.
- G. The Museums agree to abide by the American Association of Museum's *Guidelines on Exhibiting Borrowed Objects*. (Appendix C)

Outgoing Loans

Following are specific terms for outgoing loans:

- A. Objects will not be loaned to an individual, business, or City department for personal or private use under any circumstances.
- B. Loans will not be approved for extremely fragile objects, objects on exhibit, objects needing conservation, or objects that are scheduled for exhibit, research, or conservation.
- C. Objects must have complete documentation and a photographic record on file at the Museums prior to loan.
- D. A condition report must be completed by the Museums prior to releasing the object to the borrowing institution. An additional condition report must be completed when the object is returned to the Museums.
- E. The objects will not be cleaned, repaired, retouched, or altered in any way without the written permission of the Chandler Museums.
- F. Borrowing institutions may not transfer objects to a third party without written consent of the Chandler Museums.
- G. The loan may not expose any Museums object to risk by reason of inherent vice, by means of transportation, or by its temporary location.
- H. If the loan is for exhibition, the borrowing institution must abide by the American Association of Museum's *Guidelines on Exhibiting Borrowed Objects*. (Appendix C)

Duration

Loan agreements must state the duration of the loan at the time of the request. Generally, outgoing loans will be made for a maximum period of one year. The borrower must return objects to the Chandler Museums at the end of the loan period, unless the borrower previously has both requested an extension and had it approved, in writing, by the Curator of Collections. The Chandler Museums will not engage in either incoming or outgoing long-term or indefinite loans.

Credit

All outgoing loan objects used in an exhibit or publication are to be credited as a loan from the Chandler Museums, Chandler, Arizona. Incoming loans will be credited as stated on the loan agreement.

Standards of Care/Responsibility

- A. Borrowers shall be responsible for the movement of loaned items. The Borrower must pay all costs for mailing, packing, crating, and shipping, including charges for hiring special packers when necessary.
- B. The Borrower agrees to care for the objects based on the American Association of Museum's Guidelines on Exhibiting Borrowed Objects. The Borrower must also comply with any and all special instructions given by the Curator of Collections.
- C. The condition is understood to be that which is stated on the loan agreement and the associated condition report. It is understood that the objects loaned will remain in the condition received and will not be reframed, repaired, restored, cleaned, or altered in any way without written permission of the Curator of Collections.
- D. Damage to items must be reported as soon as possible to the Curator of Collections.
- E. Objects must be given special care to protect them against loss, breakage, or deterioration. Institutions must show their ability to comply with the following security measures.
 1. Small objects must be displayed in locked cases or behind glass.
 2. Prints, maps, and other flat material must be displayed in locked cases or mounted in the appropriate archival manner, according to the specifications of the Chandler Museums' Curator of Collections.
 3. Large items and costumes, not displayed in cases or behind glass, must have barriers sufficient to keep the public at a distance from the objects.
 4. Exhibit areas must be under staff or volunteer surveillance when open to the public.
 5. The Museums reserves the right to assess the mounting techniques of all loaned materials.
- F. Objects shall be packed, shipped, and received by experienced and competent persons. These activities are to be supervised by a Registrar or Curator of the participating institution.
- G. The Museums may ask for an American Association of Museum's Facilities Report from the borrowing institution. This report outlines the environment of the proposed

loan location. If an American Association of Museums Standard Facility Report is not available the Museums' curatorial staff may visit the institution to appraise the conditions of the potential loan's temporary location for the duration of the loan period.

Insurance

Outgoing Loans

All outgoing loans are to be insured at full value on the Borrower's wall-to-wall fine arts policy. The amount of coverage must at least equal total value of items estimated on the loan form. Whereas such coverage is not provided, the Chandler Museums will obtain coverage at the Borrower's expense. In addition, the borrower will pay all packing and transportation arrangements.

Incoming Loans

All incoming loans by the Chandler Museums are insured under the Museums' wall-to-wall insurance policy through the City of Chandler. The values stated on the loan agreement shall be liquidated damages in the event of loss or damage to the items. If the lender fails to indicate a value, the Museums will set a value for insurance purposes only. There are no rights against the Museums over and above what the insurance will provide. The Museums are not responsible for erroneous or deficient information furnished by the lender concerning loaned objects.

Publicity/Photography

The borrower may photograph any of the items for a catalog or publicity purpose in connection with the purposes of the loan. The Museums reserve all other rights of reproduction. One copy each of any photographs, publicity, or publication using loaned objects is to be given to the Museums at no charge.

Approval of Loans

The Curator of Collections will review and authorize all requests for loans. The Museums' Administrator is consulted on all requests and retains final approval authority. If a borrowed object is valued over \$5,000.00 or is being loaned outside of the state of Arizona, the Administrator will review, authorize, and approve the request.

Long-term Loans

Long-term loans refer to any loans to the Museums for an indefinite period of time. A long-term loan may also mean that the term of the loan agreement has expired and the material is still in the possession of the Museums. The Museums no longer accepts long-term loans. Existing long-term loans shall be reviewed by the Collections Committee and either converted to gifts, returned to the owner, or disposed of. The Museums abide by the State of Arizona's Unclaimed Property In Museums Act (See Appendix B).

XII. Exhibit Prop Collection

During the course of developing, creating, and implementing exhibits the Chandler Museums will acquire materials which are suitable to enhance the exhibit, but which are not necessarily desirable materials for the Permanent Collection. These materials could include, but are not limited to, reproductions, unprovenanced historical materials, manufactured materials, mounted photographs, and more. Exhibit components such as cases, vitrines and stands, banners, signs, interactives, and technological components are also a part of the Exhibit Prop Collection. These materials can be acquired through purchase, transfer, donation, manufacture, and more, and should be retained once the exhibit for which they were acquired closes because use in a future exhibit could be found for them. Materials in the Exhibit Prop Collection are not accessioned like materials in the Permanent Collection, but it may be prudent to document Exhibit Prop Collection components in some fashion. Although the standard of care for materials in this collection is not the same as for materials in the Permanent Collection, because the intent of materials in this collection is for display, adequate care should be given to materials in the Exhibit Prop Collection to ensure they are maintained. Exhibit Prop Collection materials will not be stored in the same location as Permanent Collection materials to avoid confusing the two. It is recognized that materials in the Exhibit Prop Collection may wear out or become damaged from their use, in which case the damaged materials will be removed from the collection. Materials in the Exhibit Prop Collection do not need to be deaccessioned prior to their removal from the collection. Revenue from materials sold from this collection should be used for exhibit development and upkeep. Until such time as a Curator of Exhibits (or similar position) is hired, the care and management, including decisions regarding the disposition and possible disposal of materials in the Exhibit Prop Collection, is the responsibility of the Exhibits Committee.

XIII. Living Collections

The living collection is divided into animal and plant collections.

Animal Collection

The Animal Collection is made up of living animals in the care of the Chandler Museums. The Museums keeps domesticated animals at Tumbleweed Ranch to aid in interpretation of agricultural life in Chandler. The animals in the Museums' collection include, but are not limited to, horses, cows, cattle, sheep, chickens, and donkeys. Animals in the Museums' collection are acquired through purchase, donation, or rescue. The Collections and Exhibits Committees decide what animals should be acquired for the Museums' Animal Collection, although the Museum Administrator makes final decisions about animal acquisitions.

The Chandler Museums' number one priority to its Animal Collection is the welfare of the animals. The Museums must provide adequate shelter, shade, water, food, and care to the animals in its collection, and must make sure that all animals are properly vaccinated. The Chandler Museums follow standards for care set out by the Association of Zoos and Aquariums. The Chandler Museums will maintain adequate staff and training to ensure the care of its Animal Collection.

Maintenance is important to caring for the animals in the Museums collection. Keepers are charged with keeping pens, coops, and other enclosures clean, as well as replacing dirty straw and keeping water and food dishes clean. Keepers are also expected to make daily observations of the animals in the Museums' collection to check for abnormalities. A daily report should be made of each animal, so as to ensure proper documentation of the health of each animal in the Museums' collection. In case of a medical emergency involving one of the animals, the veterinarian with whom the City contracts should be called immediately. The veterinarian's contact information should be posted in a conspicuous place in the keeper's workspace.

Because of concerns for the health of the animals, the Chandler Museums do not allow the general public to feed the animals maintained in the Animal Collection. Only people in a Museums guided animal experience program may feed the animals. The Museums discourage people from teasing the animals or throwing any objects at the animals or into their enclosures. The keeper, Museums staff, and volunteers have the authority to remove anyone from the Ranch who is found in violation of these policies.

Health and safety concerns also prevent non-authorized human contact with animals. Zoonotic diseases (spread from animals to humans) are a concern when people come into contact with animals. To avoid the risk of people contracting zoonotic diseases, and keeping the health and safety of the animals in mind, animal contact with the general public will only occur under supervision of appropriate museum staff or volunteers, and a hand washing station will be nearby. Keepers, Museums staff, and volunteers also need to wash their hands after contact with animals. To ensure the continued health of the animals the Museums will keep up to date with appropriate testing and vaccinations. Sick animals will be cared for as directed or recommended by the City's veterinarian.

From time to time, it may be necessary for the Museums to remove animals from its collection due to behavioral, health, or other concerns. In such cases, the Museums will make every effort to re-home

the animal in a safe place where it will be properly cared for. Decisions on the necessity of re-homing animals will come from recommendations by keepers and veterinarians, and the final decision on re-homing will be made by the Museum Administrator. If, for some unforeseen reason, Tumbleweed Ranch is forced to close, the animals housed there will be re-homed to a safe environment where they will be properly cared for. In the case that an animal in the Museums' care dies, the City's veterinarian will be consulted regarding proper disposal of the deceased animal. The Museums will investigate causes of death to ensure the safety of the remaining animals in its care.

Plant Collection

The Plant Collection is comprised of growing plants in the museum's care, which include, but are not limited to, alfalfa, cotton, citrus trees, and pecan trees, and support the missions and educational goals of the Chandler Museums and Tumbleweed Ranch. The Plant Collection does not include general park and ranch landscaping. The Plant Collection will be cared for to the standards of the American Public Garden Association. The Chandler Museums will take all reasonable measures to ensure that plants in the collection thrive and that the collection is secure from harm. Museums staff and volunteers will be responsible for the care and maintenance of plants in the collection which will include proper planting, irrigation, cultivation, soil management, pruning and weeding procedures. Application of pesticides and other forms of pest or wildlife management will be made only after consultation with and under the direction of proper experts.

XIV. Digital Collection

Digital materials are those materials which are either created electronically or converted to electronic form and can be accessed or manipulated with the use of a computer. The Chandler Museums' Digital Collection is overseen by the Public History Coordinator

The bulk of the Chandler Museums' existing archive collections are in traditional, physical formats, such as paper. Increasingly, however, digital records are being offered for archival preservation, and the Chandler Museums also produces digital copies of traditional records for access purposes. The Museums will continue to emphasize to donors and potential donors the importance of collecting original materials; however, the Digital Collections allows the Museums to "possess" an object while the original remains with the owner or community. This allows the museum to truly become a cultural storehouse. This policy affirms the Chandler Museums' formal commitment to address the challenges surrounding the indefinite preservation of the unique digital records and resources of Chandler.

The Chandler Museums appreciate the need to build sustainable but flexible strategies for managing Digital Collections in order to fulfill its mission to seek and preserve all records, regardless of physical format, which document the histories of Chandler, its communities and its people, and to improve and extend access to this information for all. In developing its capacity to handle digital collections, the Chandler Museums seek to follow emerging national and international standards and best practice in the digital preservation field.

Scope

In general, the scope of the Chandler Museums Digital Collection shall reflect the scope of the Museums' collecting practices as previously stated in this Policy. Exceptions to this scope will be reviewed on a case by case basis.

Selection of Materials for the Digital Collection

Cost, potential or actual obsolescence, and available memory storage space will force the Chandler Museums to be selective about which materials should be included in the Digital Collection. The Chandler Museums reserve the right to decline any materials from entering the Digital Collection which the Museums cannot adequately maintain.

Formats

The Chandler Museums endeavor to collect digital materials in open formats which are easily accessible with wide base software. Files in more obscure formats will be accepted only if they can be converted into a format accessible to the Museums, or if the materials are of a rare or vital nature.

Accessioning

Materials donated to the Chandler Museums and designated to go directly to the Digital Collection must be attached to a Deed of Gift for Digital Materials (Appendix A). The Deed of Gift for Digital Materials transfers title of the resources from the donor to the Museums. The Deed of Gift for Digital Materials also transfers all copyrights from the donor (if the donor is the legal holder of the copyright) to the Museums.

The process of accessioning digital resources into the Chandler Museums' Digital Collection will include:

- Appraisal and evaluation of the digital records against the Chandler Museums Collection Policy and the potential resource implications of accepting the donation
- Licensing, copyright and other legal issues, such as legal admissibility
- Obtaining metadata to establish provenance, technical details of media and file formats, and other contextual information
- Secure transfer of digital resources to the digital collections storage
- Using checksums to detect signs of deterioration or corruption during copying, and as a security measure to demonstrate the integrity of the digital record.

The Chandler Museum will develop guidelines, procedures, and training for staff in the handling and care of digital collections offered to the Chandler Museums, together with donation forms which record the information necessary for the preservation of digital material. The Chandler Museum will also conduct a survey of digital materials already held.

Storage

The Chandler Museums will keep two versions of each file in the Digital Collection. One version will be a high resolution or high quality version which will have limited access and will serve as the "master" copy of a file. The second version will be a low resolution or low quality version which will be used generally for access by museum staff, researchers, and the public at large.

Digital collections require large amounts of dedicated space for storage of the files. The Chandler Museums will store all digital collections on a server, which will be maintained by the City of Chandler's IT Department. The Museums prescribe to the concept behind LOCKSS (Lots Of Copies Keeps Stuff Safe), and will endeavor to form partnerships with other institutions with similar goals to the Museums in order to share server space and resources, in addition to having backups of the Digital Collection in remote locations. Regular backups of the Digital Collection will be undertaken.

Access

The Digital Collection is a valuable resource for Museums staff, researchers, and the public at large. Low resolution, low quality versions of all files in the Digital Collection will be made available for purposes of research, education, exhibition, scholarly work, or other appropriate purposes.

Access to the high resolution, high quality versions of the files comprising the Digital Collection will be restricted to the Museum Administrator, Curator of Collections, Public History Coordinator, and select staff from the City of Chandler's IT Department.

Security

Before accepting any materials into the Digital Collection the Chandler Museums must ensure that the material is free from infection (virus, worm, etc.) and malicious software. The Chandler Museums will use a stand-alone computer (one not connected to the Museums or City network) to run scans for infections and malicious software before entering the materials into the Digital Collection.

The main server for the Digital Collection will be scanned for infections and malicious software on a regular basis, as prescribed by the City's IT Department. It will also be protected by firewalls and other appropriate measures to protect the Collection from hackers.

Review

The Chandler Museum's Collection Policy will be periodically reviewed and updated. A strong effort to keep the Digital Collection Policy up to date should be made during each review process to avoid obsolescence of the policy.

XV. Acquisition:

Definition

Acquisition is the act of obtaining an object for one of the Chandler Museums' collections.

Authority to Acquire

The Museum Administrator of the Chandler Museums, or Curatorial staff authorized by the Museum Administrator, may acquire objects for the Chandler Museums' collections as delegated by the City Council, through the Museums Advisory Board to the Museum Administrator. Acquisitions are based upon the recommendations of the Chandler Museums' Collection Committee. The Collection Committee consists, at a minimum, of the Museum Administrator, the Curator of Collections, the Curator of Education, the Visitor Experience and Special Events Coordinator, the Public History Coordinator, a representative of the Chandler Historical Society, and a member of the Museum Advisory Board. The Museum Administrator has final approval on all acquisitions.

Means of Acquisition

The Chandler Museums may acquire materials through donation, bequest, purchase, exchange, abandonment, or other appropriate means. Typically, the Museums acquires objects primarily through donation. However, to fulfill a specific exhibition requirement or strengthen an existing collection, objects may be purchased. The purchase must be presented to the Collections Committee for review. The Museum Administrator has final approval on all purchases. Legal counsel will review other appropriate means of acquisition in addition to donation, bequest, purchase, exchange, or abandonment.

Acquisition Criteria – Permanent Collection

In order for an object to be accepted into one of the Museums' four permanent collections, the following criteria must be met:

- A. The object must be within the collecting scope of the Museums and consistent with the Museum's mission.
- B. The Museums must be able to store, preserve, and maintain the object according to professionally accepted standards.
- C. The object must not require unwarranted future expenses for the Museums in conservation or maintenance disproportionate to its usefulness in the collection.
- D. The object is intended to remain permanently in the collection, as long as it retains its physical integrity, its identity and authenticity, and/or as long as it remains useful for the Museums' purposes.
- E. The staff must have considered all the moral, legal, and ethical implications of the acquisition.

- F. The Museums abide by all federal, state and local laws, as well as any international treaty or agreement concerning the acquisition, use of, and disposal of Museums objects. (See Appendix B)
- G. No material shall be knowingly or willfully acquired for the Museums which is known to have been illegally imported into, or illegally collected in the United States contrary to the laws of the State of Arizona, and federal law, regulation, treaty, and convention. In questionable cases, the Museums Staff will abide by the advice of the Museums' legal counsel.
- H. The object's legal title must be free and clear.
- I. The object must be free from donor restrictions on its use, transfer, disposal, or other encumbrance that would limit its usefulness to the stated purpose of the Museums. Should the Museums wish to accept an exceptional gift with donor restrictions, such restrictions must be clearly stated on the *Deed of Gift* and all appropriate accession records. The restrictions must also be approved by the Collections Committee at the time of acceptance of the object and accepted by the Museum Administrator before the *Deed of Gift* is executed. The Curator of Collections will monitor all restrictions.
- J. Ownership of intellectual property rights (copyright, trademark, patent, etc.) shall be established at the time the object is accepted. If the Museums do not have ownership, any restrictions shall be clearly stated on the *Deed of Gift* and other appropriate accession records, and shall be monitored by the Curator of Collections.
- K. Appropriate documents of transfer must be obtained at the time of acquisition.
- L. If an acquisition is to be by purchase, funding shall be arranged prior to acquisition.

Additional Considerations

The Collections Committee will screen materials meeting the above criteria for additional considerations before accepting them into the Museums' collections. These considerations include, but are not limited to:

- M. The foreseeable future use of the material.
- N. Satisfactory information about the provenance of the object.
- O. The material does not unnecessarily duplicate other objects in the Museums' collections.
- P. The materials' relationship with objects in the Museums' collections.
- Q. The materials' interpretative and educational potential.

Receiving Material into the Museum

Potential donors must bring material to the Museums to be considered for inclusion in one of the Museums' collections. This material is taken on temporary custody while it is considered. The Museums will provide the same care to the temporarily held material as it would if the material were part of the Museums' collections.

- A. The Curator of Collections has the authority to temporarily accept objects for consideration for inclusion into one of the Museums' collections. The Curator of Exhibits or Curator of Education may temporarily accept items in the Curator of Collection's absence. All potential collection material should be received by one of these Curatorial staff members; however, if no Curatorial staff members are present, other Museums staff may accept material.
- B. A *Temporary Custody Receipt* form (See Appendix B) must be prepared immediately when the Museums takes possession of materials. The form must be completely filled out and signed by both the Depositor and the Museums' staff representative in authority. No material can be accepted by the Museums without this form being completed.
- C. Large, cumbersome, or distant material may be reviewed for inclusion in the Museums' collections through photographs. A *Temporary Custody Receipt* form must be completed. The Museums reserve the right to refuse to accession the object into its collections if the photographs did not fairly represent the object.
- D. If the materials offered to the Museums' collection pose a hazard to the collection, such as visible insect infestation, mold bloom, or potentially explosive material, the staff must decline the objects, take the name and phone number of the Depositor, and have the Curator of Collections contact the Depositor as soon as possible to discuss the materials offered.

Acceptance of Objects into the Museums' Collections

- A. The Museums' Collection Committee must review all potential accessions at a Collection Review within 90 days of its deposit at the Museums. If the Collection Committee is unable to review an item within this 90-day period, the Curator of Collections must contact the owner and request an extension.
- B. The Curator of Collections schedules collection reviews every two months during the first week of the month. An occasional special Collection Review may be scheduled due to the nature or quantity of material offered to the Museums in the period between Collection reviews.
- C. The Curator of Collections directs the Collection Review.

- D. Decisions of the Collection Committee are based on the object's intrinsic value in relation to Museums' mission, scope of collections, acquisition criteria, and collecting plan.
- E. Objects must receive a majority vote of the Collection Committee for the object to be recommended for acquisition.
- F. At least four members of the Collection Committee must be present at all Collection Reviews.
- G. If only four members are present at a collection meeting, objects must receive a unanimous vote from these four members for the object to be recommended for acquisition.
- H. A decision on materials offered to the collection may be postponed due to the need for additional research on the material. In this case, the Curator of Collections must contact the owner and request an extension.
- I. The Museum Administrator has final approval on all acquisitions.
- J. Items not accepted into the Museums' collections must be promptly returned to the owner unless other arrangements have been made. If repeated attempts to contact the owner fail, the non-accessioned item(s) will be considered unclaimed property and will be disposed of according to the statutes of the State of Arizona.

Museum Acquisitions

Museum Acquisitions are materials collected by the staff or purchased with funds budgeted for collections' acquisition. On occasion, staff members may acquire materials on behalf of the Museums, with the following guidelines:

- A. Purchased potential Museum Acquisitions are obtained with the staff member's own monies and shall be done at the staff member's personal risk.
- B. No staff member, not even the Museum Administrator, has the authority to purchase materials for automatic inclusion into the Museums' Permanent Collections.
- C. All potential Museum Acquisition materials shall be reviewed by the Collection Committee. Acquisition decisions are based on the same acquisition criteria as traditional gifts with one additional criterion: Is the cost of acquiring the material commensurate with its value to the Museums' collections?
- D. Staff members are not under any obligation to spend their personal monies to purchase items for the collection.

- E. Members of the Collection Committee who acquire and/or purchase a potential Museum Acquisition must excuse themselves from voting during the acquisition decision process for the material that they acquired with their own monies.
- F. If a staff member acquires an item for his/her own personal collection which falls within the Museums' collecting areas, the Museums must be given the opportunity to purchase the item as a Museums Acquisition at the same price that the staff member purchased the item for. (See the Museum's Ethics Statement Appendix B)

When staff members offer potential Museums acquisition materials that they have purchased for review, a *Temporary Custody Receipt* form is completed. The acquiring/purchasing staff member is listed and signs as the depositor. Another staff member must sign the *Temporary Custody Receipt* form as the Museums' representative.

If the materials are accepted for the collection, staff members may be reimbursed from the Museum's budget or other appropriate funds.

- A. Staff members wishing reimbursement must record their purchase amount under "Value" on the *Temporary Custody Receipt* form.
- B. Reimbursement is processed through the Museum Administrator, and appropriate receipts must be submitted.
- C. When staff members acquire materials for the Museums and are reimbursed, the donor shall be listed as "Museum Acquisition." If materials are donated from a staff member's personal holdings, it is appropriate that the staff member be listed as the donor.

Drop-Off or Abandoned Property

Occasionally, owners of materials anonymously drop off materials on the Museums' property. These things may be discovered at the front door of the Museum or left at the front desk. There are several potential reasons that owners abandon material this way.

1. The owner does not want his/her name associated with the materials that are being abandoned.
2. The owner does not want to take the time out of his/her schedule to work through the acquisition process.
3. The owner believes that the Museums are more likely to accept the material if it cannot be returned to a person.
4. The owner believes that they are making the acquisition process easier for the Museums (e.g. If there is no donor, then there is no paperwork to be filled out).

Drop-off abandoned property is troublesome for the Museums. The lack of donor information means that there is no way to document the associations, such as how the material was used, who used it, and where it came from. This makes the object a less attractive addition to the Museums and its collections.

When abandoned property is found at the Museums, the materials must be put on a *Temporary Custody Receipt* form. The staff member completing the form records the owner as “Anonymous Donation.” The discovering staff member, the time of discovery, and the place of discovery all must be recorded in the description section of the *Temporary Custody Receipt*. The Museums shall abide by Arizona State statutes governing unclaimed property in museums. Once the Museums have completed the process set forth by state law, the Collection Committee shall review the anonymous donation material with the same acquisition criteria as a regular donation. Material not accepted into one of the Museums’ collections shall be disposed of in accordance with the State of Arizona’s statutes on unclaimed property.

Transfer of Title

A *Deed of Gift* (See Appendix A) will serve as the legal instrument of conveyance of title for all acquisitions. The *Deed of Gift* shall set forth a description of all objects involved and the precise conditions of transfer.

- A. For donations, the owner and the Museum Administrator sign the *Deed of Gift* to complete the transfer of title.
- B. For bequests, a copy of the will must accompany the *Deed of Gift*. The executor of the estate, as the representative of the owner, and the Museum Administrator sign the *Deed of Gift* to complete the transfer of title.
- C. For purchases, a copy of the receipt of sale is attached to the *Deed of Gift*. Museum Acquisition shall be listed as the donor. The Museum Administrator signs as the owner and as the Museums Representative to complete the transfer of title.
- D. For exchanges, a copy of the transferring organization’s legal instrument of conveyance showing their ownership of the object should be attached to the *Deed of Gift*. A representative of the transferring organization who has authority over the collection and the Museum Administrator sign a *Deed of Gift* to complete the transfer of title.

By signing the *Deed of Gift*, the owner permanently assigns to the Museums all his/her rights, title, interest, and copyright to the property listed on the *Deed of Gift*. Further clarifications include:

- A. The donor or his/her heirs may not reclaim materials given to the Museums.
- B. Materials will not be accepted with the understanding that they will be exhibited permanently.
- C. Materials will not be accepted with the understanding that they will be kept or retained by the Museums permanently.

- D. Collections of materials will not be accepted with the understanding that they will be kept together or exhibited as a unit.
- E. Donated items may be copied or reproduced by or for the Museums for sale or distribution for the benefit of the Museums or their programs, unless such reproduction is specifically limited in writing on the *Deed of Gift*.
- F. All donations are tax deductible, however the Chandler Museums assume no responsibility for appraising the value of objects collected.
- G. Any and all restrictions must be noted on the *Deed of Gift*.

Ownership

The commencement of ownership varies with the means of acquisition. The following define the beginning of ownership of acquired objects.

- A. Donation—The Chandler Museums are considered owner of a donated item when:
 - 1. The object is accepted for the Museums by the Collection Committee.
 - 2. The donor and the Museum Administrator have executed the *Deed of Gift*.
- B. Bequests—The Chandler Museums are considered owner of a bequeathed item when:
 - 1. The object is accepted for the Museums by the Collection Committee.
 - 2. The executor and the Museum Administrator have executed the *Deed of Gift*.
- C. Purchases—The Chandler Museums are considered owner of a purchased item when:
 - 1. The object is accepted for the Museums by the Collection Committee.
 - 2. The Museums render payment, and
 - 3. The Museum Administrator has executed the *Deed of Gift*.
- D. Exchange—The Chandler Museums are considered owner of an exchanged item when:
 - 1. The object is accepted for the Museums by the Collection Committee.
 - 2. The other organization and the Museum Administrator have executed the *Deed of Gift*.
- E. Abandonment—The Chandler Museums are considered owner of an abandoned item when the Museums have fulfilled all requirements of the State of Arizona statues on unclaimed property.

Restricted/Conditional Gifts

The Museums generally do not accept objects into their collections that are encumbered by restrictions or conditions. Should the Museums wish to accept an exceptional gift with donor restrictions or conditions, such restrictions must be clearly stated on the *Deed of Gift* and all appropriate accession records. The restrictions must also be approved by the Collections Committee at the time of acceptance of the object and accepted by the Museum Administrator before the *Deed of Gift* is executed. The Curator of Collections will monitor all restrictions.

Disposition of Non-Accessioned Materials

Non-accessioned items are those items offered but not accepted by the Museums or abandoned at the Museums which fit the following criteria:

- A. Do not fall within the Museums' acquisition criteria.
- B. Are parts of an acquired collection but have little or no intrinsic value for interpretation, exhibit, public programming, or research.
- C. Are deemed by the Collection Committee not worthy to be accessioned into the Museums' collections due to their physical state or nature.
- D. Offer a potential threat to the safety of the Museums' collections and/or staff.

Discretionary judgment on the part of the staff is required for the disposition of non-accessioned material. These materials will be returned to the owner when possible. The Museums will dispose of this material if the owner so wishes or the material is deemed to fall within the statutes of the Arizona unclaimed property act. Disposition will be carried out by the Curator of Collections only after agreement with the Museum Administrator that the material fits one or more of the disposition criteria of non-accessioned materials. Disposition will be made according to the standards established for deaccessioned objects.

XVI. Deaccession:

Deaccessioning is the process of removing accessioned material from the Museums' Permanent Collections. In general, objects have permanence in the Museums' collections. However, deaccessioning is occasionally necessary in order to maintain the quality, appropriateness, and adequate care of the collections as a whole. Accordingly, when it is deemed prudent, the Museums may deaccession objects from its collections. Because the Museums hold their collections in the public trust, and due to a lack of understanding of the necessity of deaccessioning by the general public, the deaccessioning process must be cautious, consistent, deliberate, discreet, and completed with the utmost integrity.

Deaccession Criteria

An object may be deaccessioned from the Museums' collections if it meets one or more of the following criteria:

- A. The object is deemed to be irrelevant or inappropriate to the Museums' mission statement.
- B. The object lacks physical integrity, or has deteriorated to such a poor or hazardous condition that the costs of repair or stabilization exceed the value of the object and its usefulness for Museums purposes.
- C. The exhibitability (i.e. the visual interest and/or the practicality of display) of the object reduces the likelihood of it contributing to future interpretations.
- D. The object needlessly duplicates other materials of higher quality or better Chandler associations held in the Museums' collections.
- E. The object can no longer be cared for or stored by the Museums in accordance with professional museum standards, or the retention of this object reduces the likelihood of care and storage of other material.
- F. The object is more appropriately interpreted (and hence its historical significance made more readily apparent) in the collection of another institution.
- G. It is determined to be unauthentic (i.e. reproduction, forgery, or fake), or its original identification is determined to be inaccurate.
- H. The object is too poorly documented to serve the Museums' Mission Statement.
- I. The object falls within the conditions of the Native American Graves Protection and Repatriation Act or other such laws and legal instruments that nullify the Museums' title to the object.
- J. The object has been lost or stolen for longer than five years.

- K. The object poses immediate danger to other Museums holdings.

Deaccession Procedure

1. The Curator of Collections identifies and recommends objects for deaccession based on the deaccession criteria in this document.
2. The Museums must establish clear and unrestricted title to any object proposed for deaccession. Where restrictions as to use or disposition of objects under question are found to apply, the Museums should act as follows:
 - a. Mandatory restrictions shall be observed strictly unless a court of competent jurisdiction authorizes deviation from the terms.
 - b. Objects with precatory restrictions documented in Museums records should not be disposed of until reasonable efforts are made to comply with the restricting conditions.
 - c. If there is any reasonable question as to the intent or force of restrictions, the Museums will seek the advice of its legal counsel.
3. A *Justification for Deaccession* form (Appendix A) is completed by the Curator of Collections for each item and presented to the Collections Committee for review and approval.
4. The Collection Committee submits the *Justification for Deaccession* to the Museum Administrator for review and final Museums approval.
5. For an object valued over \$1,000.00, the Museum Administrator will present the recommended deaccession to the Museums Advisory Board for approval. Following a vote by the Committee, the chairperson of the Committee signs a compiled list of deaccessioned objects form representing the Committee's decision. The approval or disapproval of the proposed deaccession will be noted in the Committee's meeting minutes. This list of deaccessioned items will be forwarded to the City Council.
6. The Museum Administrator notifies the Curator of Collections as to the Committee's final decision.
7. The *Justification for Deaccession* form and a copy of the Committee's compiled list shall be stapled to the *Deed of Gift* of the object.
8. All records pertaining to the object will be marked WITHDRAWN with the date of final approval. Records of disposition shall become part of the Museums' permanent collection records.
9. All of the Museums' identifying numbers (i.e. accession numbers) will be removed prior to disposition.

10. Deaccessioned material shall be disposed of in the most appropriate manner. Materials will be disposed in the following ways in order of preference and priority:
 - a. If a cultural group who has rights to the object has requested the material, it will be repatriated in accordance with NAGPRA policies, UNESCO treaties, or other existing statutes. Certain objects fall under federal regulations or statutes that require the object to be destroyed. In these cases the object will be destroyed in accordance with the appropriate statutes.
 - b. If the material is deemed inappropriate for the Permanent Collection but still has relevance as an educational tool or as an exhibit prop, it will be transferred into the Museums' Education or Exhibit Prop Collection as appropriate.
 - c. If the material was donated, bequeathed, exchanged, or purchased, consideration will first be given to placing the material, through gift, exchange, or sales, to another tax-exempt educational institution that shall maintain the material in the public domain.
 - d. If the material was obtained through abandonment, the object will be disposed of in accordance with Arizona State statutes regarding unclaimed property.
 - e. Deaccessioned material not disposed of using these methods will be sold anonymously at an advertised public auction in a manner that will protect the interests, objectives, and legal status of the Museums.
 - f. Remaining unsold deaccessioned items shall be discarded if no alternative solution can be established for disposal.
 - g. Objects with little historical or financial value that were deemed unsuitable for transfer or trade after being offered to other tax-exempt educational institutions may be discarded or destroyed.

Restrictions

- A. Any and all funds received from the sale of deaccessioned material from the collections shall be only used for the purchase of new material for the collection or for conservation of the collections.
- B. No deaccessioned materials shall be returned to the donor, their heirs, or agents by the Museums. Donors, their heirs, or their agents may purchase the material at public auction. The Museums are not responsible to notify the donor, their heirs, or agents of said auction, unless notification of sale was a legal or precatory condition as part of the original *Deed of Gift*.
- C. No deaccessioned materials shall be given, directly sold, exchanged, or otherwise transferred to Museums staff, members of the City of Chandler City Council, members of the Museums Advisory Board, the Board of Directors of the Chandler Historical Society, Chandler Historical Society members, volunteers, or any associated group of the Chandler Museums, or the families or representatives of these individuals.
- D. Disposal or destruction of a deaccessioned object must be witnessed. The date, manner of disposal, and witness names must be recorded in the object's collection records.

Cases of Extreme Hazard

In extreme cases, when an item presents an immediate threat to the collection and/or staff, and cannot be housed safely in the Museums until full approval for deaccession is obtained, it may be destroyed and full approval obtained retroactively.

Deaccession of Unknowns and Found In Collections

Objects in the collection without donor information or objects discovered without accession number shall be deaccessioned following the same standards as collection objects with known donor information.

- A. The Curator of Collections shall attempt to determine ownership of the object prior to taking action on its disposal.
- B. If ownership can not be determined, objects will not be deaccessioned without seeking the advice of legal counsel.
- C. Prior to deaccession, the Museums shall establish clear and unrestricted title to the object proposed for deaccession through the State of Arizona's Unclaimed Property in Museums Act.

XVII. Collection Care and Conservation

The Museums regard the care, preservation, and conservation of its Permanent Collections of utmost importance. It is the intention of the Museums to minimize permanent damage and loss while pursuing its educational goals and stated mission. The Chandler Museums recognizes that preventative conservation of collections is the most effective means of promoting the long-term preservation of objects. To achieve this, the Museums will endeavor to limit damage and deterioration to objects, provide guidelines for the continued use and care, recommend appropriate environmental conditions for storage and exhibition, and encourage proper procedures for handling, packing, and transporting.

- A. Collection care/conservation begins with the initial decision to accept an object into the collections and continues throughout the object's existence in the Museums' collections.
- B. The Museums will acquire only those objects that can be properly cared for and maintained by following museum standards for collection care established by professional bodies such as the American Association of Museums and the American Institute for Conservation.
- C. Collection care is a responsibility of all staff members; however, the Curator of Collections is responsible for supervising the care and maintenance of all collections that the Museums acquires.
- D. The Museums require that all objects in the collections be housed and displayed according to the highest professional standards. Preservation concerns are equal for all objects, whether on display, in storage, or on loan.
- E. The Museums will monitor and assess the impact of its activities and environment on the preservation of the collections.
- F. The Museums will provide its collections with a clean, secure, and stable environment suitable for maintaining the physical integrity of the objects. This environment is continually improved by systematically upgrading storage and facility conditions. The integrity of the storage environment also is maintained by not collecting objects that would have an adverse impact on existing collections.
- G. The Museums protects its objects from deterioration through controlling the environment of its building and storage facilities with respect to the following factors:
 - 1. Extreme fluctuation in temperature and relative humidity.
 - 2. Exposure to infrared light, ultraviolet light, and high intensity visible light.
 - 3. Pollutants such as dust, gasses, off gassing, and abrasive particulate matter.
 - 4. Insects, rodents, birds, and other pests.
 - 5. Storage and exhibit materials.

6. Abrasion, distortion, shock, vibration, inadequate space, improper support, improper and/or excessive handling.
- H. The Museums will maintain adequate work and storage areas as well as adequate staff levels to render proper conservation and collection maintenance.
- I. All staff, interns, volunteers, City workers, and contractors who work with collections must be trained before they handle collections. The Curator of Collections will provide training.
- J. The Museums, as part of its registration procedures, will maintain information regarding condition and changes in condition of all collection objects. (See Appendix A)
- K. In general, the Museums will preserve objects in the condition they were in at the time the Museum acquired them. The Museums will not necessarily assume a responsibility to restore objects to their condition when new.
- L. All collection material will be stored in a manner to provide optimal security, accessibility, and preservation.
- M. The Museums strive to select conservation methods and materials that, to the best of current knowledge, are reversible and do not adversely affect objects or their future examination, treatment, or function in the Museums.
- N. Prior to beginning any conservation or restoration procedure, an object's treatment recommendation report must be completed and approved by the appropriate staff. This report is completed under the guidance of the Curator of Collections and is approved by the Museum Administrator.
- O. All objects approved for conservation or restoration procedures must be fully documented and photographed prior to all treatments. Additional photographs focusing on the problem area must be taken prior to any treatment. Photographs must also be taken after the treatment in order to document the conservation treatment.
- P. A **Condition Report** (see Appendix A) must be completed before and after conservation treatments.
- Q. Only qualified professional conservators using approved techniques and materials shall perform major conservation and restoration. The Curator of Collections will confirm the qualifications of the professional conservator. The Curator of Collections will determine the techniques and materials with the conservator and the Museum Administrator will approve the actions prior to the treatment being performed. Minor procedures may be performed by trained staff or trained volunteers under the direct supervision of the Curator of Collections following written guidelines from a conservator.

- R. All conservation and/or restoration efforts, whether by staff or contract professionals, will be under the Curator of Collections' direction. Likewise, use of any cleaning product, method, or instrument upon collection objects must have prior approval of the Curator of Collections.
- S. Staff and/or outside contractors must complete a conservation treatment report for all treatments. This report shall outline and document in both text and photographs each step, material, and method used in the treatment. The report shall be recorded in the objects collection records. The Curator of Collections is responsible for overseeing completion of this report.
- T. The Museums shall document all damage including accidents, vandalism, or sudden and extreme natural deterioration that a collection object suffers. A damage report shall be recorded in the object's collection records. The Curator of Collections is responsible for completing the damage report.

XVIII. Documentation:

The maintenance of accurate records on the acquisition, identification, location, and disposition of collection and loaned items is a major responsibility of the Museums. To ensure maintenance of accurate collection records, appropriate procedures are developed by the Curator of Collections, approved by the Museum Administrator, and outlined in the *Collection Management Procedures Manual*. Collection records normally include a descriptive catalog record, as well as evidence of legal ownership or possession of all objects in the Museums' care. These collection records should relate to the object that they describe by a unique catalog number and should provide for the easy retrieval of object information and current object locations. Collection records should further reflect the object's provenance, condition history, and all Museums activity of the object (loan, exhibit, restoration, and deaccession).

Standards

- A. All Museums records are completed according to the procedures outlined in the *Collection Management Procedures Manual*.
- B. Museums records are completed in a timely fashion, housed in secure locations, and physically preserved by proper handling and storage methods.
- C. All primary records are safeguarded from hazards such as fire, water, smoke damage, or loss. Duplicates are stored off-site.
- D. Every object (including archival materials) is assigned an individual catalog number that will be used to associate the object with its collection records.
- E. All objects are cataloged to document all physical features, associations, provenance, conditions, uses, and restrictions.
- F. Computer data from the collection database is backed up on a monthly basis. Backup discs containing the computer database information are stored offsite.
- G. Records documenting the periodic inventory and/or systematic review of collections are maintained for reference.
- H. Records of objects on loan to the Museums reflect all activity and locations of the object while under the control of the Museums.

Catalog Numbers

The Museums assign individual catalog numbers to each item in its collections. The Museums use a trinomial system in which the three numbers are separated by a period. (e.g. 1999.24.5) The first number indicates the four digit year that the object was accessioned. The second number is assigned chronologically to each donor within a given year. The third number is the individual object number of that donation. Lowercase letters and additional numbers separated by a period identify objects with separate components. The catalog number is important because it ties the actual object to all the collection records that the Museums keep on the item. Therefore, this number should be created and

altered with the utmost care. The procedure for creating and altering accession numbers is explained in the *Collection Management Procedures Manual*.

In most archives, individual catalog numbers are not assigned to archival materials. However, it is necessary that the Museums' archive collection be processed in a way suitable to the Museums' cataloging as a whole and in keeping with the usual archival practice. Therefore some individual archival objects have accession numbers. When several similar archival objects from a single donor share a subject, they are processed as a "collection" and share a single accession number. In the archival use of the term, a "collection" consists of a body of documents, regardless of size and complexity, brought together and maintained as an individual subject group. Archival collections must be stored together.

Temporary Custody

The *Temporary Custody Receipt* form is used as a temporary receipt of the materials being offered for consideration for the Museums' collections, potential loan materials, materials left for study purposes, or other materials left in the Museums' custody. This form serves an important legal function by acknowledging that material has been received by the Museums and providing proof that the material is in the Museums' possession.

Accession Records

Accession Records are the Museums' permanent, legal proof of collections ownership. They are formal, legal records and shall not be altered in a casual fashion. There are two types of Accession Records:

A. **Record of Deposit**

From the beginning of the Chandler Historical Society's collecting in 1969 until 1986, documentation of donations was erratic. Where documentation exists, a *Record of Deposit* seems to have been used to show transfer of ownership from the donor to the Museum. *Records of Deposit* which have been completed are currently stored with accession records. Some of these *Records of Deposit* bear the signature of the donor, and thus can stand in for a *Deed of Gift*. Others merely have a donor's name and the date of acquisition. These *Records of Deposit* shall be used to establish the Museum's ownership of the item according to the State of Arizona's Unclaimed Property in Museums Act.

B. **Chandler Historical Society Deed of Gift**

From 1986 until such time as the collection is transferred from the Chandler Historical Society to the City of Chandler, a *Deed of Gift* (See Appendix A) has served as the legal instrument of conveyance of title for all acquisitions. The *Deed of Gift* was signed by the donor and a Chandler Historical Society representative, and contained a description of all objects involved, the precise conditions of transfer, and information that the Donor wished to include about the object. The *Deed of Gift* was the Museum's only permanent, legal proof of ownership of objects. The Museum strove for the Deed of Gift to be fully accurate and complete prior to being executed.

C. **City of Chandler Deed of Gift**

The City of Chandler will use a *Deed of Gift* to legally transfer title from the donor to the Museums. A *Deed of Gift* lists all the items from a donor's gift accepted into the Permanent Collection by the Museums with descriptions of each item. The *Deed of Gift* contains language that says the donor is signing all rights to the items over to the Museums, confirms that the donor owns the items and has the ability to sign title of them over to the Museums, and also notes any restrictions put on the donation by the donor. The *Deed of Gift* must be fully accurate and complete prior to being executed. The *Deed of Gift* is signed and dated by the donor and the Curator of Collections before it is forwarded for final approval by the Museum Administrator. The *Deed of Gift* is the Museums' only permanent, legal proof of its ownership of objects in its Permanent Collection, and therefore it should not be altered after it is executed. A copy of the completed *Deed of Gift* will be given to the donor, while the original is retained by the Museums, and is stored according to archival standards.

Condition Report

Collection objects naturally deteriorate. This deterioration accelerates each time an object is either handled, exhibited, or loaned to another institution. A *Condition Report* form (see Appendix A) documents the condition of an object in the collection at a specific time. A *Condition Report* is created each time an object is removed from storage, before and after exhibition, before and after a loan, and any time a change in physical appearance is observed. Reviewed in date order, *Condition Reports* show the progress of any deterioration and help determine when an object is a candidate for conservation or restoration. *Condition Reports* also document damage from accidents or handling. A *Condition Report* is a legal description of condition and should not be altered after it has been approved.

Justification for Deaccession

A *Justification for Deaccession* form (Appendix A) documents the process of removing an object from the Museums' collection. This form contains information about the proposed object including: accession number, brief description, photograph, the source or donor (with current phone number and address if available), history of use, restrictions, estimated value, and rationale for the proposed deaccession. The *Justification for Deaccession* also documents the ultimate decision regarding the deaccession and its final disposition. The *Justification for Deaccession* serves as a legal record of the deaccession process for the object and should not be altered.

Correcting Collection Records

Most museums have omissions in their records, objects that have been separated from their provenance, and/or other related problems that are the result of past Museum practices. Sometimes it is advisable to clarify information given on collection records to resolve an inaccuracy. These corrections shall be made only in the case of a solid basis for the change. Changes will not be made upon supposition, "leaps of faith," or inadequate research. The Museums have two forms to alter collection records: the *Accession Record Alteration Form* and the *Catalog Number Alteration Form*. The *Accession Record Alteration Form* is used to alter information on either a *Temporary Custody Receipt*, a *Chandler Historical Society Deed of Gift* or a *City of Chandler Deed of Gift*. The *Catalog Number Alteration Form* is used to establish or change the catalog number associated with an object.

The procedure for correcting collection records is explained in the *Collection Management Procedures Manual*.

Unknowns/Found in Collections

An object whose donor information has been lost or misplaced is known as an “unknown.” An object discovered in the Museums or in the off-site storage areas with no catalog number, but appears to be a misplaced collection piece, is referred to as “found in the collections.” While it is desirable to have all “unknowns” and “found in collections” associated to a donor, care must be taken to make a realistic assessment of all evidence before any change is made in the item's status. A thorough search of all records shall be conducted, including a search for similar objects with unknown provenance, to eliminate all other possible candidates.

XIX. Inventory:

A periodic inventory of the Museums' collections is of primary importance in maintaining accountability for the public trust. The inventory process enables the Museums staff to reconcile records and documentation with the objects in order to update and upgrade the collection records. Inventory also provides the opportunity to review the integrity of the Museums' collections in relation to their environment.

- A. The Museum Administrator shall require and be responsible for the Museums' maintaining an inventory of all collections in its care, custody, and control, the cycle of which shall be completed every ten years.
- B. The Curator of Collections will supervise the ongoing inventory process. Each year the Curator of Collections shall prepare an inventory report for the Museum Administrator.
- C. Inventory procedures are outlined in the *Collection Management Procedures Manual*.
- D. Whenever an object is returned to its storage location, staff will complete an informal spot-check inventory. An informal spot-check inventory is completed by quickly examining the immediate surrounding storage location to ensure that all objects are accounted for. (e.g. When returning an object to an archival box, the staff checks the actual contents of a folder against the shelf list)
- E. Documentation created by scheduled inventories and spot-checks will be retained in the Museum's collection records for future reference.

XX. Access:

The Chandler Museums exist as a repository for the material culture of Chandler. The collections of the Museums exist for the benefit of present and future generations of Chandler residents. Therefore, the public shall be granted reasonable access to exhibited and stored collections on a non-discriminatory basis for educational and research purposes. The Chandler Museums, however, are legally responsible for the care and protection of its collections and must put the preservation of objects above all other considerations. The Chandler Museums will strive to provide maximum accessibility to the collections by the public, consistent with the safety, security, and conservation of the objects and the availability of the staff. The Curator of Collections is responsible for ensuring that all access policies and procedures are followed.

Users

There are many users who request access. These users are sometimes researching a subject, observing the Museum's practices and procedures, or working to improve the environment around the collections. Users include:

- A. City personnel: includes staff members of the various departments of the City government.
- B. Researchers: includes an individual or representative of a company interested in using materials held by the Chandler Museums for a legitimate scholarly interest.
- C. Visitors: any individual or group of individuals who is interested in examining the Museums and their operations. Visitors may include students or staff from other museums.
- D. Outside contractors: includes companies and their representatives hired for a specific contract period by either the Museums or the City government.

Types of Access

Of the users who periodically need access to the Museums' Permanent Collections, generally one of two types of access is required: access to materials and access to collection areas. Access to materials is usually requested by visitors, researchers, donors, members of historical organizations, or museum professionals that have a scholarly interest in either Chandler history or one of the Museums' collection objects. Access to collection areas, on the other hand, is requested by either City personnel and/or outside contractors who must work near objects for a specific project of either the Museums or the City government.

General Conditions

- A. Access to collection areas and materials not on display will be granted by appointment only and must be coordinated with the Curator of Collections.
- B. Appropriate allocation of staff time shall be taken into account when a request for access is received.

- C. The staff reserves the right to deny access to objects or collection areas to any individual who fails to comply with the Museums' access policy and procedures.
- D. The Chandler Museums reserve the right to charge a user fee if it is determined that the time and/or materials required in providing access exceeds the average allocation of staff time.

Access to Collection Areas

- A. All collection areas must be locked and/or alarmed when staff is not present.
- B. All Museums staff, City personnel, outside contractors, visitors, and researchers are required to log in and out of secure collection storage areas.
- C. Absolutely no food or drink is allowed in any collection areas.
- D. City personnel, outside contractors, researchers, and visitors must not enter or work in a collection area without a curatorial staff escort.
- E. To safeguard the physical integrity of its collections, Museums staff may limit the size of groups who request access to collection storage areas.
- F. Work in collection areas by City personnel is directed by the Museum Administrator and supervised by curatorial staff. The Museum Administrator and Curator of Collections shall schedule this work based on necessity and curatorial staff schedules.
- G. City personnel and outside contractors must abide by all curatorial staff directives when working around collection objects.
- H. Outside contractors who fail to follow curatorial staff directives regarding work in collection areas may be liable for any damage caused to collections.
- I. City personnel shall not be given permanent keys to secure collection storage areas. Temporary access may be given to select City personnel at the discretion of the curatorial staff.
- J. Outer coats, briefcases, handbags, book bags, backpacks, packages, or any other containers are not permitted in the collection storage areas.

Access to Objects in the Permanent Collections

- A. Access to the objects requires curatorial staff supervision.
- B. Users shall not handle objects until trained by the Museums' curatorial staff, and no objects should be handled unless express permission has been granted by curatorial staff.

- C. Curatorial staff shall have the ultimate authority in determining any handling or moving of objects.
- D. No object shall be handled or moved by City personnel or outside contractor without the assistance of curatorial staff.
- E. City personnel or emergency workers may move objects without the assistance of curatorial staff if there is an immediate threat of damage or destruction to the objects.
- F. City personnel and outside contractors must abide by all curatorial staff directives when working around objects.
- G. Researchers shall register as a researcher and sign an agreement to abide by the Chandler Museums' policies and procedures to be granted access to the collections.
- H. Curatorial staff will monitor researchers in the collection storage spaces.
- I. Researchers/ Visitors may be liable for any damage caused to objects in the collection storage areas.
- J. Producing a reproduction of some objects is possible (i.e. photocopy or digital scan). The Curator of Collections determines the availability of reproductions based on the condition of the object and the Museums' reproduction policy.
- K. Due to issues of maximizing accessibility for all Chandler residents while balancing concerns for conservations and staff time, the Museums reserve the right to deny a group's requests for special showing of collection objects.

Access to Materials on Exhibit

- A. The Museums' exhibit areas are open to the general public on a regular schedule.
- B. Absolutely no food or drink is allowed in any exhibit area.
- C. No bags or packages are allowed in the exhibit areas.
- D. Visitors are encouraged to use and enjoy all interactives throughout the exhibit areas; however, Permanent Collection objects must not be handled by any Museums visitor.
- E. Objects will not be removed from exhibits areas for research or examination without the written permission of the Museum Administrator.
- F. If a visitor wishes to examine or research an object on exhibit, the visitor should contact the Curator of Collections to schedule an appointment after the object has gone off exhibit.

XXI. Emergency Preparedness, Security, and Insurance:

The Chandler Museums maintain an active risk management program to minimize risk of loss to its collections. This program includes scrutiny of the physical plant for potential hazards and loss and insurance on its collections.

Emergency Preparedness

- A. In the event of an emergency, **PEOPLE HAVE PRIORITY OVER COLLECTIONS.**
- B. The Museums shall have an *Emergency Preparedness Manual* that outlines the procedures to prepare for and/or cope with emergency situations at the Chandler Museums.
- C. The manual shall pertain primarily to the Museums' collections, but shall also outline procedures for human safety.
- D. The Curator of Collections shall update the Museums' *Emergency Preparedness Manual* annually.
- E. The Museums' *Emergency Preparedness Manual* shall be reviewed, on a scheduled basis, by the City's Director of Emergency Management.
- F. All staff and volunteers shall be familiar with fire exit, location of fire extinguishers, and exiting procedures as outlined in the Museums' *Emergency Preparedness Manual*.
- G. The Museums shall maintain a fire alarm system linked directly to the fire department.
- H. The Museum Administrator, Curator of Collections, Curator of Education, Public History Coordinator, and the Visitor Experience and Special Events Coordinator shall retain a copy of the *Emergency Preparedness Manual* at their homes.

Security

In the event of thefts, accidental losses, or vandalism of the Museums' collections, the incident must be reported immediately to the Museum Administrator and Curator of Collections. Under the Museum Administrator's approval, a prompt written report of the circumstances surrounding the damage, loss, or disappearance will be completed. This report shall include an estimate of the monetary value involved, an evaluation of the causes and consequences, and a recommendation of any procedural changes necessary to prevent recurrences. This report will be forwarded to the Chandler Police Department, and to the Museums Advisory Board.

To prevent a theft or assist in the event of a loss:

- A. The Museums maintain a 24 hour monitored security system that reports directly to a private security firm. This firm then alerts the Chandler Police Department.
- B. The Museums shall have sufficient inventory control over its collections to report a loss in a timely manner.
- C. The Museums shall have policies and procedures to investigate, report, and seek the appropriate assistance for a loss outlined in its *Collection Management Procedures Manual*.
- D. The Museums shall have thorough documentation and descriptions to identify lost material.
- E. The Museums shall have procedures for recording and long-term monitoring of a loss outlined in its *Collection Management Procedures Manual*.

Insurance

A. Chandler Museums' Permanent Collections

- 1. The Chandler Museums' Permanent Collections are self insured by the City of Chandler while on Museums property or in transit to and from borrowing institutions. The City's liability shall begin when Museums staff take possession of the incoming loan material and shall include transit if the Museums staff are transporting the material.

B. Incoming Loans

- 1. Unless the Lender elects to maintain his or her own insurance, all loaned items shall be insured by the Chandler Museums for the duration of the loan period.
- 2. The Chandler Museums' liability for loss or injury to any item shall not exceed the value stated on the *Incoming Loan Agreement* and shall not include indirect or consequential damages.
- 3. If the Lender does not state a value, the Museums shall enter a best knowledge value, and the Lender's recovery shall be limited to that value.
- 4. If Lender maintains his or her own insurance, the Museums must be furnished with a certificate of insurance naming the City of Chandler as additional insured or waiving subrogation against the City of Chandler, the Chandler Museums, and Museums staff and volunteers.

C. Outgoing Loans

5. The Borrower must provide standard wall-to-wall coverage for all items borrowed.
6. The values stated on the *Outgoing Loan Form* shall be liquidated damages in the event of loss or damage to the items.
7. The amount of coverage must at least equal total value of items estimated on the *Outgoing Loan Form*.
8. The Chandler Museums are not responsible for erroneous or deficient information furnished by the Borrower to the Borrower's insurer concerning an outgoing loan.

XXII. Reproduction, Intellectual Property, and Copyright:

The Museums seek to gain control of all intellectual property and copyrights associated with the material in its collections. The Museums may obtain ownership or control of copyright by one of the following methods:

- 1.) As the “author” of a work made for hire, either work performed by an employee within the scope of employment or work commissioned from another under certain circumstances;
- 2.) By the transfer of copyright through assignment; and
- 3.) By the transfer of copyright through licensing.

When the Museums acquire an object that appears to be protected by copyright, it is important to establish, if possible, who holds copyright and to clarify whether any of the existing copyright interests passes to the Museums with the object. Lack of interests should be noted on the accession records along with any contact information on the actual copyright holder. If the copyright interests exist and the Museums wish to obtain them, or the right to exercise some or all of them, this must be negotiated with the copyright holder and expressly noted on the *Deed of Gift* and all related forms.

Requests for Reproductions of Materials from the Museums’ Collections

The Chandler Museums provide a photographic duplication service for material in its collections. The establishment of a copy service is intended to satisfy the preservation and security needs of the Museums while enhancing public access to collection holdings and to serve a variety of outreach activities including the preparation of exhibitions, publications, and audio-visual presentations.

Photographic Reproductions

The reproduction images released by the Museums must be of the highest quality in order to reflect favorably on the Museums’ reputation as an educational and research institution. Therefore, it is essential that the Museums maintain control over all reproduction of images from its collections including xerographic, copy negative, video, and digital. For this reason, the following policies govern the Museums’ reproduction services:

- A. Photographic, digital, and xerographic reproductions shall be made by the Museums staff. Researchers will not be allowed to produce their own copies either through borrowing original photographs or by bringing their own reproduction equipment to the Museums.
- B. Filming and videotaping of exhibit areas, archival material and objects may be performed by a professional photographer in the Museums only after receiving written consent from the Museum Administrator and with the supervision of curatorial staff.
- C. All requests for photographic reproductions must follow the conditions and procedures as outlined on the *Requests for Reproductions of Materials from the Museum’s Collections* form.

- D. The copyright law of the United States (Title 17, U.S. Code) governs the making of photocopies and other reproductions of copyrighted material in the Chandler Museums' collections. Materials in the Chandler Museums' collections may be protected by copyright law.
- E. Applicants assume all responsibility for questions of copyright and invasion of privacy that may arise in the copying and use of photographic reproductions.
- F. The Museums reserve the right to restrict photography of copyrighted or culturally sensitive material.
- G. Only three-dimensional objects that the Curator of Collections determines are in stable condition and accessible may be filmed or videotaped.
- H. Museums ownership of collection objects does not imply that the Museums have permission to reproduce or publish such materials. The Curator of Collections must confirm permission to reproduce an object prior to creating any reproduction.
- I. Promotional and press release photographs will be provided on a loan basis to the media at no charge.
- J. The following credit line must be used: Courtesy of the Chandler Museums, Chandler, AZ. It is mandatory that the reproduction is credited as specified.
 - 1. With printed material, it is preferred that the basic credit line appear on the same or facing page as the image. Credit for each individual item is mandatory in all cases.
 - 2. With exhibitions, credit should appear within the exhibition area.
- K. A complimentary copy of any published work in which a Museums photographic reproduction appears must be given to the Chandler Museums.
- L. No changes shall be made to the original photographic reproduction including: taking a detail, tinting, superimposing, or cropping without the written permission from the Museum Administrator of the Chandler Museums.
- M. The user will make no additional reproductions. Additional copies must be obtained from the Museums.
- N. All requests for reuse or change in use must be applied for in writing.
- O. In authorizing the publication or reproduction of a collection object the Chandler Museums do not surrender its own right to publish, or grant others permission to do so.

- P. The Museums reserve the right to limit the number of copies, to restrict the use or reproduction of rare or valuable material, to make quotations on material involving unusually difficult copying, and to charge a higher fee than specified.

XXIII. NAGPRA and other laws:

The Museums recognize that it must act responsibly and respond to ethical concerns surrounding culturally sensitive materials in its collections. Therefore, the Museums seek to abide by all international treaties, federal and state laws, and the standards established by the American Association of Museums that pertain to culturally sensitive materials.

NAGPRA

- A. It is the Chandler Museums' intent and policy to comply with Public Law 101-601, the "Native American Graves Protection and Repatriation Act." (See Appendix B)
- B. Museums staff will not intentionally collect Native American human remains and objects specified under the Act unless the appropriate Native American tribe or corporation has granted permission in writing.
- C. Native American human remains and objects specified under the Act that are included in a gift, bequest, purchase, or any other legal manner, will be held in trust by the Museums and:
 1. When possible, the appropriate Native American tribe or corporation will be notified by the Museums.
 2. The Museums will comply with the request of the appropriate Native American tribe or corporation as to the disposition of the material, providing the request is in accordance with Public Law 101-601.

Archeological and Paleontological Material

It is the Chandler Museums' intent and policy to comply with the Antiquities Act of 1906, the Archaeological Resources Protection Act of 1979, the National Historic Preservation Act of 1966 (See Appendix B), and the standards set by the American Association of Museums. The Museums will only acquire archeological and paleontological specimens collected in compliance with these and all other pertinent federal, state, and local regulations.

Biological Resources

Biological resources are protected by a variety of statutes. It is the Chandler Museums' intent and policy to comply with the Migratory Bird Act of 1918, the Marine Mammal Protection Act of 1972, the Endangered Species Act of 1973, and CITES of 1977 (See Appendix B). Therefore, the Museums will only acquire biological specimens collected in compliance with these and all other pertinent federal, state, and local regulations.

Nazi-era Material

During its reign in power, the Nazi regime orchestrated a system of theft, confiscation, coercive transfer, looting, pillage, and destruction of objects of art and cultural property in Europe. Millions of artifacts were unlawfully taken from their rightful owners, including private citizens; victims of the Holocaust; public and private museums and galleries; and religious, educational, and other institutions. This reality has produced millions of objects that were unlawfully obtained with falsified provenances. Due to the Museums' mission statement, it is unlikely that it would be offered these types of artifacts for inclusion into its collections. However, it is the Chandler Museums' intent and policy to continually identify and achieve the highest standard of legal and ethical collection stewardship practices. Therefore, the Museums shall abide by The American Association of Museum's *Guideline*

Concerning the Unlawful Appropriation of Objects During the Nazi Era (Appendix C) as amended in April of 2001.

XXIV. Ethics:

The Museums hold its collection in the public trust. Therefore, activities that conflict with staff responsibilities, cause staff to favor outside interests over those of the Museums, or suggest impropriety must be avoided. To prevent this, the Museums have developed its own ethics policy, *The Chandler Museums Ethics Statement*, (Appendix C) that all staff are required to sign on an annual basis. In addition to this ethics statement, the Museums adhere to the *AAM Code of Ethics for Museums* (Appendix C), and the Curatorial staff specifically adheres to the *AAM Curator's Code of Ethics* (Appendix C) and the Society of American Archivists' Code of Ethics.

General Guidelines

- A. To act ethically and legally in collecting, acquiring, reproducing, lending, and disposing of objects.
- B. To discourage unethical, illegal, and destructive practices with respect to collecting, acquiring, storing, reproducing, displaying, transporting, and trafficking in objects.
- C. To provide the best collection care, research, interpretation, and exhibition of the Museums' collections as possible.
- D. To refrain from providing donors with appraisals for any gift or bequest.
- E. To refrain from providing visitors, researchers, or any patron with a market value for their personal material.

Specific Guidelines

- A. **Personal Collecting and Dealing**
Staff may not compete with the Museums in any personal collecting activity. If a staff member acquires an object which falls within the collecting areas of the Museums, the staff member must disclose the purchase to the Museums' Collection Committee. The Chandler Museums have the right to acquire the object (at the price paid by the employee) after a review by the Collection Committee. Objects collected prior to an individual's involvement with the Museums shall be exempt from this policy.

Employees and their immediate families may not trade objects from their personal collection for objects from the Museums' collections. Staff may not store personal collections on Museums property or cause research on personal collections to be done on Museums time. Staff members may not deal (buy and sell objects for profit on a regular basis) in historic objects, books or papers, act on behalf of a dealer, accept outside employment from a dealer, or retain interest in a dealership.

- B. **Appraisals**
Neither staff nor Museums associated persons shall provide appraisals for proposed donations or general public requests. The IRS will not accept a Museums appraisal for valuation of donated material. Donors must provide an independent appraisal. The Museums shall provide a *Deed of Gift* to the donor as proof of gift for the purpose of

appraisal. Neither staff nor associated Museums persons should endorse any individual appraiser. A list of local appraisers is available from the American Society of Appraisers.

Collection Ethics

- A. Collections in the Museums' custody support its mission and public trust responsibilities.
- B. Collections in the Museums' custody are protected, secure, unencumbered, cared for, and preserved.
- C. Collections in the Museums' custody are accounted for and documented.
- D. Access to the Museums' collections and related information is permitted and regulated.
- E. Acquisition, disposal, and loan activities are conducted in a manner that respects the protection and preservation of natural and cultural resources and discourages illicit trade in such materials.
- F. Acquisition, disposal, and loan activities conform to the Museums' mission and public trust responsibilities.
- G. Disposal of collections through sale, trade, or research activities is solely for the advancement of the Museums' mission, and use of the proceeds from the sale of collection materials is restricted to the acquisition or direct care of collections.
- H. The unique and special nature of human remains and funerary and sacred objects is recognized as the basis of all decision concerning such collections.
- I. Collection-related activities promote the public good rather than individual financial gain.

XXV. Definition of Terms:

Accessioning: The formal process used to accept and record an item into one of the Museums collections.

Accession number: a control number, unique to an object, the purpose of which is identification, not description.

Accession Record: an immediate, brief, and permanent record utilizing a control number for materials added to the collection, and to which the museum has custody, right, and title. Customarily, an accession record includes, among other data, the accession number, date and nature of acquisition (gift, purchase, bequest, etc.), source, brief identification and description, condition, provenance, local associations and history, value, and name of staff member recording the accession.

Acquisition: The discovery, preliminary evaluation, taking custody of, and acknowledging receipt of materials.

Bequest: Materials left or given to the Museums via a will with the intention that the materials would be included into one of the Museums' collections. It is distinguished from a gift, which is given during the life of the donor. Bequests go through the same review process as a donation and may or may not be accepted into one of the Museums' collections.

Care: The Museums maintain appropriate and adequate records pertaining to the provenance, identification, and location of the Museums' holdings and utilizes current professionally accepted methods to ensure their security and the minimization of damage and deterioration.

Cataloging: The creation of a full record, in complete descriptive detail, of all information about an object or group of objects that is cross-referenced to other records, files, and photographs of the object. Catalog data can be in the form of cards, sheets, and automated data.

Checksum: a digit representing the sum of the digits in an instance of digital data; used to check whether errors have occurred in transmission or storage

Collections: Objects that have intrinsic value to history, science, art, or culture. Collections reflect, in both scope and significance, the Museums' stated purpose.

Collections Areas: Spaces that contain objects held in public trust by the Chandler Museums. These areas include, but are not limited to, storage and exhibition facilities at 178 E. Commonwealth Avenue; The McCullough-Price House at 300 S. Chandler Village Drive; Tumbleweed Ranch at 2200 S. McQueen Road, Chandler, AZ.

Collections Committee: The Collection Committee consists, at a minimum, of Museums staff members: the Museum Administrator, Curator of Collections, Curator of Education, Public History Coordinator, and the Visitor Experience and Special Events Coordinator, in addition to a representative of the Chandler Historical Society and a member of the Museums Advisory Board.

This committee reviews all objects offered to the Museums' collections and decides which items will be acquired.

Collections Policy: A written document, accepted by the Museums' governing body, specifying the Museums' policies concerning all collection-related issues including accessioning, documentation, storage, and disposition. Often includes a Scope of Collections Statement.

Conservation: Actions taken on behalf of collection objects to aid in their preservation by preventing unnecessary or avoidable loss, decay, damage, and other forms of deterioration, and ensuring environmental monitoring, adequate storage and work areas, and proper training for curatorial staff.

Deaccessioning: The formal process used to remove an object from the Museums' collections permanently; or when an object has been lost, stolen, or destroyed, the formal process used to document the loss of the object in the collection records.

Deed of Gift: A *Deed of Gift* (See Appendix A) serves as the legal instrument of conveyance of title for all acquisitions. The *Deed of Gift* sets forth a description of all objects involved, and the precise conditions of transfer.

Ephemera: Materials meant to be used for only a short time.

Exhibits Committee: The Exhibits Committee consists of Senior Staff of the Chandler Museums: Museum Administrator, Curator of Collections, Curator of Education, Public History Coordinator, and Visitor Experience and Special Events Coordinator. At such time as an Exhibits Coordinator (or similar position) is hired, that person will head the Exhibits Committee. This committee determines interpretive themes, plans, constructs, and maintains exhibits by the Chandler Museums.

Found in Collections: An object discovered in the Museums or their storage areas with no catalog number, but appears to be part of one of the Museums' collections. The term can be used for any item with questionable status that the staff finds in the Museums or in offsite storage.

Loan: A temporary transfer of objects without the transfer of ownership.

Object: A generic term for materials acquired by the Museums and accessioned into one of its collections.

Permanent Collections: Those that are of intrinsic value to history, art, science, or culture and that support the mission of the Museums and are held and curated by the Museums.

Preservation: Specific actions taken to prevent or retard deterioration or damage to collection objects. Such actions may include cleaning and stabilization techniques that work to prevent individual objects from deterioration or damage.

Provenance: The derivation or origin of an object.

Restoration: Conservation techniques that will return a damaged object to its original form.

Scope of Collections Statement: Defines the purpose of the collections, and sets agreed upon limits such as subject, geographical location, and time period to which objects must relate. The statement

may also consider the uses to which a collection will be put, and state the type of objects that will be acquired to fulfill the purposes of the collection. These statements tend to be very broad and often describe what is currently in the collection, rather than focusing on plans for the future.

Unknown: An object whose donor information has been lost or misplaced.

Appendix A - Forms

- i. Receipt for Materials
- ii. Donor Sheet
- iii. Deed of Gift
- iv. Condition Report
- v. Justification for Deaccession
- vi. Incoming Loan Agreement
- vii. Outgoing Loan Agreement

Appendix B - Laws

- i. Native American Graves Protection and Repatriation Act
- ii. Antiquities Act of 1906
- iii. Archaeological Resources Protection Act of 1979
- iv. National Historic Preservation Act of 1966
- v. Migratory Bird Act of 1918
- vi. Marine Mammal Protection Act of 1972
- vii. Endangered Species Act of 1973
- viii. CITES of 1977
- ix. Guidelines Concerning the Unlawful Appropriation of Objects During the Nazi Era

Appendix C - Ethics

- i. Chandler Museum Ethics Statement
- ii. American Association of Museums Code of Ethics for Museums, 2000
- iii. American Association of Museums Curator's Code of Ethics, 1996
- iv. American Association of Museums Guidelines on Exhibiting Borrowed Objects, 2000
- v. American Association of Museums Guidelines Concerning the Unlawful Appropriation of Objects During the Nazi Era, 2001