

INFORMATION ONLY



BETHESDA HISTORICAL SOCIETY

Collections Management Policy and Manual



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1. Statement of Purpose

- a. **Mission:** The mission of the Bethesda Historical Society's collection is to develop a comprehensive physical and digital repository of Bethesda primary sources documents, images, objects, and oral histories that will be shared with today's diverse residents and Bethesda residents of the future.
- b. **Brief History:** The Bethesda Historical Society (BHS), incorporated in 2020 as a 501(c)(3) organization, aims to preserve the rich heritage of Bethesda, Maryland. This community lacked a historical repository until the Bethesda Historical Society's inception. Bethesda's history is intertwined with Maryland, the nation, and its capital. The area was once crossed by an ancient trail, later transformed into a trade route. It played a role in the War of 1812, with architect William Thornton's farm protecting vital patent models. The Bethesda Meeting House, a relic of an early Presbyterian parish, still stands as a testament to the antebellum past. The community has seen various eras, from plantations to industry to suburban development, and now an urban center. This diversity necessitates significant effort in documenting its history. BHS collections have rapidly expanded. The organization has acquired hundreds of artifacts, including school memorabilia, historical records, and everyday life artifacts.

2. Statement of Authority

- a. **Operational Authority:** As the Board of Trustees only meets twice a year in person, images of objects that are donated may be shared via email with the Board or President for approval to accession.
- b. **Role of the Board, Staff, and Volunteers:** When an object is obtained for the Bethesda Historical Society with the intent to accession into the collection, a member of the board, staff, or volunteer will fill out a Temporary Custody Receipt

for the donor and send the object's information to the Board or President via email. If the object(s) is approved by the Board or President, a Deed of Gift will be sent to the donor with the object's information. Once a signed Deed of Gift is received from the donor, BHS can catalog the objects. BHS will retain a signed copy of the Deed of Gift for the object record file, and the donor will retain a signed copy for their records.

3. Code of Ethics

- a. The Bethesda Historical Society follows the American Alliance of Museums (AAM) Code of Ethics. AAM's Code of Ethics for Museums is available here: <https://www.aam-us.org/programs/ethics-standards-and-professionalpractices/code-of-ethics-for-museums/>
- b. BHS does not financially capitalize off its collection objects.

4. Scope of Collections

- a. **Brief History of Collections:** The Bethesda Historical Society was established in 2019. In the same year, BHS began collecting objects under the current President. With the goal of preserving a vast range of artifacts that encompass Bethesda's founding, BHS has amassed a collection of objects detailing local schools, community and religious organizations, country clubs, local businesses, and everyday life in Bethesda.
- b. **Present Nature and Scope of Collections:** The current scope of the Bethesda Historical Society collection encompasses at least 400 objects and archival pieces that are relevant to the founding of Bethesda and 20th and 21st-century life in the community of Bethesda. The collection contains Bethesda-related objects such as school yearbooks, country club memorabilia, Bethesda ephemera, church artifacts, and community organization memorabilia.

- c. **Collecting Parameters:** The Bethesda Historical Society will continue to collect items that are relevant to the history of Bethesda and display the changes in daily life that have occurred in Bethesda since it was founded.

5. Definition of Collections

- a. **Permanent Collection:** The permanent collection contains objects, books, and archival materials that detail the founding of Bethesda in 1871 to the present.
- b. **Educational Collection:** The educational collection contains objects that are identical to objects in the permanent collection, and they provide context to the objects in the permanent collection.

6. Acquisitions/Accessioning

An **acquisition** is the act of gaining legal title to a collection item or group of items (i.e., a “transfer of title” from the previous owner to BHS).

Accessioning is the formal process of taking legal ownership of objects, especially (but not always) to add to the collection and care for the objects over the long term.

Temporary custody refers to object(s) that have been deposited with the Bethesda Historical Society for the purpose of identification, authentication, educational programming, or consideration for acquisition.

a. Authority

- i. Proposals to acquire and accession materials are presented to the President of the Board of Trustees.
- ii. The Board of Trustees or President evaluates the proposal and submits their decision for or against accessioning.
- iii. A collections staff person or volunteer maintains the authority to document, process, and record all acquisition transactions.

b. Accession Criteria

- i. In order for an item to be accessioned into the Bethesda Historical Society collection the item must be:
 1. Relevant to the history of Bethesda.
 2. In good or excellent condition, unless it is the last object of its kind.
 3. Must be able to be stored and handled without causing harm to the existing items in the collection by staff members or volunteers of BHS.

c. Methods of Acquisition

- i. Methods for acquisition into the Bethesda Historical Society collection are:
 1. Purchase: the BHS may purchase an object to be accessioned into the collection.
 2. Donation: an item or collection may be donated by any person if it is relevant to the history of Bethesda. BHS has the right to refuse the donation.
 3. Bequest: an individual may choose to designate the BHS as an object's owner in their will. BHS has the right to refuse the bequest.
 4. Transfer: an item may be transferred from another cultural institution to BHS.

d. Found in Collection (FIC)

Found in Collection are objects whose ownership cannot be determined.

- i. The staff and volunteers of the Bethesda Historical Society are responsible for doing their due diligence when it comes to researching the possible source or number of the Found in Collection (FIC).

- ii. The institutional memory of the object should be documented in writing and may be used to demonstrate the history of the Society's ownership of the object.
- iii. A temporary number should be created for the FIC item so that its location can be recorded in the BHS museum database.
- iv. If an object's accession number has not been identified, it will be assigned the next available number within an accession group.
- v. If the Board of Trustees decides to deaccession an object and the owner of the object is unknown, BHS must prove that the object has been in the care of the historical society for three years according to Title 17 of the Abandoned Property Act and Regulations of Maryland.

e. Responsibility for Deed of Gift and other documents associated with accession

- i. Before an item or collection of items is accessioned into the collection, a Deed of Gift must be filled out by the President of the Board, collections staff member, or volunteer.
- ii. Other documents associated with accessioning should be filled out by the President of the Board, collections staff member, or volunteer.

7. Deaccessioning/ Disposal

Deaccessioning is the process used to formally approve and record the removal of a collection item or group of items from the historical society's accessioned collections.

Disposal is the act of physically removing a collection item or group of items from the historical society's collection.

a. Authority

- i. The staff will present a proposal for deaccessioning to the President to approve the deaccession of an object or objects from the Bethesda Historical Society collection.

b. Deaccession Criteria

- i. The object has fallen outside of the Bethesda Historical Society's mission, collection plan, or accessioning criteria (Section 6b) and has no foreseeable value to the Society.
- ii. The object has been damaged or deteriorated beyond repair and no historic or cultural value remains.
- iii. The collection contains duplicate objects of the same typology and would benefit from the disposal of one.
- iv. BHS can no longer properly and professionally care for the objects and/or BHS needs storage or conservation funds for objects of relevance to the collection.
- v. The object was illegally or unethically required, or its authenticity has been refuted.

c. Policy

- i. The Bethesda Historical Society must have full and clear title to the object(s) before it can be deaccessioned or disposed of.
- ii. Any object(s) considered for deaccession must have no restrictions placed upon it/them that might prevent its/them legal deaccession.
- iii. The Bethesda Historical Society's Board of Trustees, staff, and volunteers are not permitted to privately acquire any object(s) that have formed part of the collection after the object(s) has been deaccessioned.
- iv. Hazardous materials that pose a threat to board members, staff, volunteers, and visitors must be disposed of in accordance with federal, state, and local laws. The disposal must be carefully and fully documented and photographed.
- v. All applicable federal, state, local, and international laws, treaties, and regulations will be followed.

d. Accepted Methods of Disposition

- i. Donation to a similar institution.
- ii. Exchange with a similar institution.
- iii. Auction or sale.
- iv. Destruction.

e. Use of Funding

- i. Funds from the sale of deaccessioned materials can only be used for acquisitions and the continued care of the collections.

f. Records of Deaccessioned Items

- i. The President, staff or volunteers must ensure that complete and current files are permanently maintained for all deaccessions and disposals.
- ii. For each item or collection that is deaccessioned, a Deaccession form should be completed with the reasoning and method of disposal.

8. Incoming and Outgoing Loans

a. Authority

- i. The Board of Trustees has the authority to approve loans to and from other institutions.
- ii. These loans will be presented to the Board by the President, staff or volunteers.

b. General Policy: Incoming Loans

- i. Loan agreements will outline loan terms, including duration, care and protection, return and cancellation, insurance and costs, uses and display conditions, packing and transportation, reproduction and photography, unclaimed loans, copyright, and exhibit labels/credit line requirements.
- ii. Incoming loan objects must meet the following criteria:

1. Loan objects have records establishing clear title.
 2. The loan is not under a third-party loan agreement.
 3. The loans adhere to established legal and professional ethical standards.
 4. The loan has a formal written loan agreement.
 5. All loans are made for a set term not to exceed two years. With appropriate approval, loans may be renewed for set terms of two years.
- iii. Upon arrival to the Bethesda Historical Society, a Condition Report of the loaned object will be conducted by a staff member or volunteer. This Condition Report should be compared with the lending institution's condition report to ensure that no change occurred to the object during transport.
 - iv. It is the responsibility of the lender to notify the Bethesda Historical Society of changes in ownership over the duration of the loan. Changes in ownership require that BHS enter into a new loan agreement with the new owner.
 - v. As mentioned previously, loan terms will not exceed two years. In the event that the lender cannot be contacted at the end of the loan term and does not come to claim the property within one year of termination, BHS must follow Maryland's abandoned property laws.
 - vi. The Bethesda Historical Society reserves the right to terminate an incoming loan at any time before its expiration with reasonable notice to the owner.

c. Paperwork and Loan Numbers

- i. For each loan item, a loan agreement and condition report must accompany the loaned objects.

- ii. The President, staff, or volunteers are responsible for keeping paperwork for loaned objects.
 - 1. Loaned items will be indicated with an L at the front of the object number of what year the loan was made and which loan it is within the year. Example: L2023.01
 - 2. The President, staff, or volunteers is responsible for monitoring loans and ensuring that environmental measures are met for the items.

d. General Policy: Outgoing Loans

- i. Loan agreements will outline loan terms, including duration, care and protection, return and cancellation, insurance and costs, uses and display conditions, packing and transportation, reproduction and photography, unclaimed loans, copyright, and exhibit labels/credit line requirements.
- ii. Before an object(s) is sent out on loan from the Bethesda Historical Society, a Condition Report on the object needs to be conducted by a staff member or volunteer. A copy will be retained for the Object Record file and another copy will be sent out with the object.
- iii. Outgoing loan objects must meet the following criteria:
 - 1. Loan objects have records establishing clear title.
 - 2. The loan is not under a third-party loan agreement.
 - 3. The loans adhere to established legal and professional ethical standards.
 - 4. The loan has a formal written loan agreement.
 - 5. All loans are made for a set term. With appropriate approval, loans may be renewed for a set term.
 - 6. BHS can inspect any time the object(s).

7. BHS reserves the right to terminate an outgoing loan before its expiration.

9. Documentation, Collections Records, and Inventories

a. Documentation

- i. Accession log: Each accessioned item should have a physical “Donor Questionnaire” filled out with known information such as the Donor and type of object. This paperwork is organized by Accession number in binders ranging from the years 2019 to 2023. Each page of the accession log should have a picture of the object.
- ii. Deed of Gift: With each accession, a Deed of Gift detailing the object(s) within the accession should be filled out. This paperwork should be signed by both the donor and a BHS representative. BHS should retain a signed copy for the object record file and the donor should be instructed to keep a Deed of Gift for their personal records.
- iii. Condition report: Upon coming into the collection, a Condition Report for a newly accessioned item should be completed by a member of BHS staff or volunteer. This should be retained in the Object record file and referenced during inventory.

b. Collections Records

- i. Catalog record
 1. Object ID
 2. Object name
 3. Title
 4. Donor
 5. Description
 6. Photograph
- ii. Location

- iii. Condition report

10. Care of the Collection

- a. **Handling of the Collection:** Professional curatorial practices will be adhered to all times by staff and volunteers who handle the collection in the storage area, during exhibit installation, or during study and examination of objects.
- b. **Storage:** No object shall be stored in such a manner that would cause harm to the object. This includes every effort to be made to protect objects from damage by light, moisture, and dust in the storage area.

11. Security and Access to Collections

All Bethesda Historical Society staff, guided by the President of the Board of Trustees, are responsible for the overall security of the collections area and the safety of the collection, both in storage and on exhibit.

- a. **Exhibits:** A visual inspection of all exhibit areas will be performed when the office is open.
- b. **Storage:** All storage shall be kept locked, unless staff/volunteers are working in the immediate area.
- c. **Public Access:** Public access to the collection or examination of a collection object for historical study must be granted by the President of the Board. The visitor/researcher must be attended by staff/volunteer/President when entering limited access areas or examining collection objects.

12. Appraisals

The Bethesda Historical Society and any of its board members, staff, or volunteers cannot provide appraisals of objects and archival materials.

13. Legal and Ethical Considerations

Certain types of collections present specific issues because of the applicable legal and ethical standards. The Bethesda Historical Society acknowledges these issues and is willing to comply with the laws and abide by high ethical standards.

- a. **NAGPRA:** The Bethesda Historical Society complies with all rules and regulations implemented by the Native American Graves Protection and Repatriation Act of 1990. BHS will make a good-faith effort to fully research all eligible collections objects and their cultural affiliations.
- b. **Cultural Property:** The Bethesda Historical Society supports efforts made by local, state, national, and international authorities to protect art, antiquities, national treasures, and ethnographic material from exploitation. BHS repudiates the illicit traffic in art and cultural objects. Objects that have been stolen, unscientifically gathered or excavated, or unethically acquired will not be made part of the collection.
- c. **Visual Artists Rights Act (VARA):** The Bethesda Historical Society complies with all rules and regulations implemented by the Visual Artists Rights Act of 1990. BHS will work with artists to ensure that artists' rights are protected if their artwork is exhibited or owned by BHS. On the website, images of the artwork will be low to medium resolution to ensure the artist's rights.

14. Intellectual Property

Intellectual Property Rights are the rights and protections based on federal and/or state statutes or common law such as patents, trademarks, copyright, privacy, and publicity as well as the moral rights of living artists as delineated in the Visual Artists Rights Act of 1990 and any subsequent revisions thereof.

a. Authority

- i. It is the responsibility of the President, staff members, or volunteers to identify and document the holder of the intellectual property rights of items in the collection.
- ii. It is the responsibility of the President, staff, or volunteers to identify and document the holder of the intellectual property rights of items being acquired by the Bethesda Historical Society.
- iii. The President, staff, or volunteers may delegate the research of the rights holders to appropriately trained interns.
- iv. The President is responsible for ensuring that all intellectual property and copyright laws and regulations are met and understood by all staff and volunteers.

b. Policy

- i. The Bethesda Historical Society will not knowingly permit infringement of intellectual property rights. The collection may be subject to intellectual property rights owned by others. BHS will manage its collection in accordance with these copyrights in order to protect the interests of the owners of copyrights including the Bethesda Historical Society itself.
- ii. The Bethesda Historical Society will comply with all intellectual property rights, international, national, state, and local laws, regulations, and ethical standards.
- iii. The President will provide training to incoming staff and volunteers to create awareness regarding intellectual property policies.
- iv. Before a reproduction is made, the object's catalog must be reviewed to ensure no restrictions apply related to use or reproduction. All requests for permission to publish or reproduce collection items must be made in

writing to the Bethesda Historical Society. BHS will permanently keep all requests for use or reproduction.

- v. The public will be permitted to photograph exhibit objects for noncommercial use, permitted that the Bethesda Historical Society holds the proper rights. The use of flash photography by the public is forbidden. Signage and other notifications will be made to the public to communicate this.

15. Review of Collections Management Policy

- a. The Collections Management Policy and Manual will be reviewed every five years to ensure that the policies outlined are up-to-date and relevant to the current structure of Bethesda Historical Society.
- b. Any changes to the Collections Management Policy and Manual will be submitted to and approved by the Board of Trustees.