

**Collection Policy**  
**Milwaukee County Historical Society**

**MILWAUKEE COUNTY HISTORICAL SOCIETY  
COLLECTIONS POLICY  
RESEARCH AND ARTIFACT COLLECTIONS**

**INTRODUCTION**

This Collection Policy is a system of mandatory guidelines for the Milwaukee County Historical Society defining the responsibilities of collections management and establishing the conditions for acquiring, loaning, maintaining and deaccessioning collections. While there is no universal law for management of collections held by museums, all professionals within the field acknowledge that the preservation and appropriate, respectful interpretation of collections placed in their care is a moral responsibility. Therefore, minimum standards for collection management have been established and promulgated by the American Association of Museums and other professional groups. As with all standards, these have evolved in response to concerns expressed by museum professionals, various public constituencies and the government.

The Milwaukee County Historical Society's Collections Policy is an example of this evolution. Some early collections donated to the Historical Society shortly after its founding in 1935 by the Old Settlers Club were accompanied by basic documentation. From 1940 through 1944, additional accessions were recorded in a ledger book with minimal documentation. From the mid-1940s through 1963, few records appear to have been kept. However, in 1963, a serious effort to record the acquisitions of the previous twenty years was mounted, resulting in a lengthy list of acquisitions bearing that date. Finally, with the hiring of paid professional staff in the mid-1960s, the Milwaukee County Historical Society began to maintain systematic records of its collection. A "Policy on Library and Research Collections" was adopted in 1965 as an expansion of the Society's mission statement. The policy statement which follows represents the first effort at codifying collections policies and procedures for both the research and artifact collections.

The Collections Policy of the Milwaukee County Historical Society is implemented through collections procedures. The procedures are prepared by the curator of collections for review by the committee and approval by the director.

**MISSION STATEMENT**

The following mission statement has been approved by the Board of Directors of the Milwaukee County Historical Society:

The primary function of the Milwaukee County Historical Society is to collect, preserve, make available and disseminate materials, both artifactual and documentary, pertaining to the history of the city and county of Milwaukee and the wider metropolitan area which they anchor.

Initially, this statement of purpose led the Historical Society to begin assembling collections of artifacts and documents relating to the history of Milwaukee County which were stored in space provided on the seventh floor of the Milwaukee County Court House.

However, shortly after the Society's founding, the organization became involved in the acquisition and interpretation of several historic homes and their accompanying sites. In the late 1930s, the Historical Society, the Milwaukee County Park Commission, and the National Society of the Colonial Dames in Wisconsin joined together to save the Kilbourn House from destruction. In 1938, the residence was moved from its original location at Fourth and Court Streets to Estabrook Park, where it was restored as a WPA project.

In 1941, the Lowell Damon House, the oldest residence in the City of Wauwatosa, was given to the Milwaukee County Historical Society by the sons of Alexander Rogers, a former owner of the home. The Damon House has been operated as an historic house museum by the Historical Society since the date of acquisition.

In 1952, the Milwaukee County Historical Society acquired its third historic home, the Jeremiah Curtin House in Greendale. The vacant structure had become part of the federal government's Greenbelt Project during the 1930s, at which time an effort was made to restore the house. However, World War II brought an end to this project, and the house fell into serious disrepair. Despite acquisition by the Historical Society in the early 1950s, funds for restoration of the property did not become available until the Bicentennial in 1976. Restoration of the Curtin House was completed in 1981, and since that time the County Historical Society and the Greendale Historical Society have interpreted of the facility.

Throughout the sixty-five year period of the Milwaukee County Historical Society's operation, the organization has continued to collect artifacts and documents relating to the history of the community. Since 1965, these have been stored and exhibited in the Milwaukee County Historical Center, the former Second Ward Branch of the First Wisconsin Bank which donated the building to Milwaukee County at that time. Because of space limitations within this facility, the Historical Society has also made use of donated storage facilities at other locations throughout its history. For a number of years, these included buildings on the Milwaukee County Grounds. By 1993, however, the Society decided to lease more secure off-site storage space at a warehouse on West State Street, and during the past year additional off-site storage space for documents has been leased at the Milwaukee County Records Center.

## SCOPE OF COLLECTIONS

The Milwaukee County Historical Society fulfills its responsibility for managing its collections and properties by adopting a scope of collections. The scope outlines the parameters and themes of collecting.

**Spatial Ranges:** The *primary spatial range* of interest for all collecting is Milwaukee County, which includes the City of Milwaukee. The *secondary spatial range* of interest for all collecting is the surrounding metropolitan area as it reaches out into southeastern Wisconsin, the Midwest, and the United States. A strong relationship must be established between the primary and secondary ranges if artifacts of the latter are to be collected.

The Milwaukee County Historical Society operates with awareness of, and in cooperation with, other metropolitan area repositories and private institutional and corporate archives.

The Historical Society, however, serves as the official repository for historic Milwaukee County government records.

**Temporal Range:** The temporal range for collection artifacts and documents is somewhat broader than the spatial range, including materials from all periods to document the history of the region and its historic sites. This long time frame provides depth to current and potential interpretive programs, and

allows the most complete exploration of the interpretive framework.

While the *primary temporal range* might be established as the period from 1835 to the present, beginning with the founding of Milwaukee County, the *secondary temporal range* would extend back through earlier periods of settlement to the Native American presence in the region.

**Themes:** The scope of collections is governed by key interpretive themes that have emerged as particularly important to the history of Milwaukee County. Artifacts which illuminate topics within these themes will be actively collected. The following list of themes defines primary areas of interest from which specialized collecting interests will grow. However, collecting may not be limited exclusively to the following themes and topics.

Economic History

Native American Cultures: Upper Great Lakes (existing collections only)

Fur Trade: 1600s – 1840

European Exploration/ Settlement

Maritime Trade/ Shipping

Commercial and Manufacturing

Social History

Ethnic History:

Immigration  
Settlement Patterns  
Cultural Heritage

Politics:

General  
Socialists  
Progressives

Education

Recreation

Arts  
Sports  
Pastimes

Family

Women

Architectural History

Everyday Life

Medical History

Children's History

Military History

Civil War

Mexican War

Spanish-American War

World Wars I and II

Korean War

Vietnam War and Gulf War

Cold War

Civil Defense

Transportation History

Water

Lake Michigan  
Rivers  
Bridges

Land

Railroads  
Automobiles  
Public Transit

Air

Aviators  
Air Fields  
Space

Institutional History

MCHS

Friends

Auxiliary

Old Settlers Club

**Types:** Since its inception, the collections of the Milwaukee County Historical Society have expanded to include not only artifacts and archival materials, but also historic structures and the objects housed in the buildings at the time of acquisition. Various philosophies of management and collecting have expanded the number of properties and collections placed in the public trust. Guided by the spatial, temporal, and thematic parameters outlined above, the collections of the Milwaukee County Historical Society include historic sites, historic buildings, artifacts, archival material, archaeological material, and library material.

Artifacts are historic, objects acquired (1) for exhibition and/or research, (2) to furnish a historic structure, (3) to provide documentation for the interpretation of a site and/or structure, or (4) to enhance the public programs presented. These include artifacts (1) that originated or pertain to the history of the geographic range of interest, (2) that have a provenance to an interpreted site, or (3) that duplicate or closely approximate items original to the interpreted sites that no longer exist or are unavailable for exhibition. The artifact collections may include household furnishings and implements; fine and decorative art objects; military objects; tools and products of trades, crafts, and manufacturing; agricultural implements; objects for transportation; textiles, clothing and personal accessories; and ethnographic objects.

Archival materials are primary source documents, original photographic prints and negatives, original motion picture material (film and videotape), paper ephemera, and/or electronic files. They are acquired because they (1) document the history of Milwaukee County, (2) establish a provenance relationship to the sites collections, or (3) document the institutional history of MCHS. Archival material may include rare published matter such as maps, books, and plans that conform with material identified under the temporal and spatial ranges mentioned above.

Library materials, as a discrete group from the archival collections, are defined as published and unpublished scholarly works, microfilms, videotapes, periodicals and other current research materials relevant to the history of Milwaukee County. Current publications, published period works without a provenance to the sites, and photographic (including motion picture) copy prints are among the items included here.

Historic structures are buildings with sufficient integrity and provenance to make them worthy of preservation and interpretation. Historic structures currently part of the collection include the Milwaukee County Historical Center, the Jeremiah Curtin House, the Lowell Damon House, and the Kilbourntown House. These structures represent significant examples of architectural or cultural history. Structures added to the collection must likewise have sufficient provenance and architectural integrity to make them worthy of preservation and interpretation. Historic structure collections also include building components removed in the process of restoration.

Historic sites: The intrinsic value of the Jeremiah Curtin House, the Lowell Damon House, and the Kilbourntown House and the adjacent lands, or any other site under the jurisdiction of the Society provides the basis for MCHS's work, and these sites must be researched, protected, and interpreted. The importance of the sites and the need to research and interpret the larger place cannot be forgotten when discussing the more traditional definitions of "collection."

Archaeological materials consist of prehistoric and historic ruins, artifacts, and floral and faunal remains (1) excavated on MCHS property; (2) systematically excavated by MCHS staff or other professionals on

non-MCHS property in compliance with state and federal laws; and (3) surface finds from MCHS property. The materials include the documentation which gives the artifacts their meaning.

## **DELEGATION OF RESPONSIBILITY**

Milwaukee County Historical Society Board of Directors: The legal authority for the approval of collection management policy, acquisition, and deaccessioning rests with the board. The Collections Committee recommends the implementation of policy for the Society or the acquisition or deaccession of collections items to the director, who recommends action to the board.

Collections Committee: The Collections Committee is appointed by the director, and currently includes the director, curator of research collections, curator of collections, and curator of exhibitions. The committee:

1. Recommends collections management policies for approval by the board.
2. Develops the procedures by which the policies are implemented for approval by the director.
3. Reviews proposed acquisitions and recommends acquisition to the board.
4. Reviews proposed deaccessions from the collections and recommends deaccessions to the Museum and Library Committees of the board.
5. Approves loans from the collections.
6. Acts as an advocate for the resources necessary to meet professional standards for the care and management of collections.

The director serves as chair and the curator of collections as recording secretary. The director is liaison between the Collection Committee and the board. The committee shall generally meet quarterly or as often as is deemed necessary by the chair.

Staff: The Collections Unit (under the direction of the curator of collections and the curator of research collections aforementioned and the assistant curator of research collections) is responsible for maintaining collections records and for registering, accessioning, and cataloging artifacts, archival material, and historic structures. The physical care of collection objects, including the archaeological collection, is also the responsibility of the Collections Unit. The Collections Unit also catalogs and maintains the library materials. The curator of collections coordinates the care of historic structures. Interpretation staff is responsible for non-accessioned objects and reproductions, providing the Collections Unit with inventories and other records of these collections when appropriate.

## ACQUISITION

Subject to approval by the Collections Committee and Board, objects will be acquired by Milwaukee County Historical Society. MCHS adds to its collections to improve the quality of its research and to enhance the educational value of its programs. The Board accepts these items into the collection upon the professional recommendation of the staff, taking responsibility for stewardship only after establishing clear and legal title.

The Milwaukee County Historical Society may acquire collections through donation, bequest, purchase, exchange, archaeological excavation and documentation of surface finds and non-documented objects. The Collections Unit will recommend the acquisition of artifact and archival collection items to the Collections Committee. The committee reviews the objects and recommends approval.

### Criteria

The Milwaukee County Historical Society will consider items for acquisition and accessioning if the following conditions are met:

1. The item falls within the MCHS collecting scope.
2. MCHS can properly care for or develop a plan for the care of the item in accordance with professionally accepted standards.
3. The item is in reasonable condition and will not adversely affect other items in the collections or pose a threat to human life.
4. The item comes with free and clear title.
5. The item meets collection needs by filling a gap in the collection or replacing an inferior example.
6. The item does not represent an unnecessary duplication of artifacts already in the collections.
7. MCHS intends to keep the item in the collection as long as the item retains its physical integrity, authenticity and usefulness for MCHS's purposes.

MCHS will not knowingly accept materials of illicit origin or doubtful title into the collections. Should accessioned material later prove to be of questionable origin, MCHS will contact the appropriate authorities and make reasonable efforts to resolve the problem ethically and in accordance with the law. MCHS supports the legal efforts to protect cultural materials and archaeological sites and follows the guidelines set by the Archaeological Resources Protection Act, and the Native American Graves Repatriation Act, and adheres to the standards set by professional archaeological societies.

MCHS will not acquire, through donation, bequest or purchase, items from books that have been dismantled for the purpose of making parts of them available to the Board.

Items acquired as library materials do not require approval by the Board.

A legal instrument of conveyance which adequately describes the object(s) and the legal conditions of the transfer must accompany each donation, bequest, purchase or exchange. Once MCHS has acquired title to the object, the donor or vendor no longer has any legal claim to the object. All items accepted into MCHS collections fall under the jurisdiction of the MCHS Board of Directors and if unrestricted, may be displayed, loaned, retained or disposed of in the best interests of MCHS and the public it serves.

Ownership of an object is separate from ownership of copyrights under Title 17, U.S. Code (copyright law), therefore MCHS will attempt to obtain exclusive copyright, when applicable, for new acquisitions to the historical collection. Appropriate language will be included in the muniment to insure conveyance of all copyrights, including all rights necessary for electronic distribution of work through present or future technology. If the donor does not own the copyrights, MCHS will make a reasonable effort to locate the owner and obtain these rights. For purchases, MCHS will ask the vendor to supply the names of previous owners or descendants of the originator in an attempt to obtain copyrights. These procedures will be followed until, under the law, such artifacts fall into the public domain.

The lack of copyright ownership will not preclude acceptance of an item for the collection, but the records for such an item will be clearly marked regarding its copyright status and the object's use will be limited. Borrowers and researchers will be responsible for obtaining permission from copyright owner(s) to reproduce these items.

### Donations

Items may be acquired by donation for historic structure, artifact, archival and library collections through the transfer of ownership from an individual, corporation, or institution to MCHS. Artifact and archival collections require committee review and Board approval.

MCHS will generally not accept restricted gifts into its artifact, archival and historic structure collections. Exceptions may be proposed for Board approval.

Potential donors will be informed of the unrestricted nature of all donations. A deed of gift executed by the donor and MCHS shall be obtained for all donations in accordance with MCHS procedures.

In compliance with the Internal Revenue Service code for non-profit institutions and to avoid possible conflicts of interest, the staff of MCHS may not appraise items for donors, institutions, or members of the general public (see IRS Publication 561 *Determining the Value of Donated Property* and Publication 526 *Charitable Contributions*). Staff members may give the names of at least two appraisers to a donor seeking such information, and will co-operate with the donor in making the materials available for appraisal. The staff may establish values for collection items for insurance purposes only.

Donors must arrange and pay for these independent appraisals on gifts for tax purposes. Gifts will be appraised at fair market value and the donor is allowed to take deductions only to the extent set by law. MCHS staff will promptly complete any Internal Revenue Service forms for a donor seeking tax

deductions. The completion of such forms does not necessarily imply MCHS's concurrence with the appraised value.

### Bequest

Collection items may be acquired through bequests where MCHS is named as beneficiary in a will. Bequests of personal property shall be referred to the Collections Committee which will recommend acceptance or refusal. Bequests may be accepted into the collections in total or in part. Items that do not become part of the collections may be disposed of in accordance with Board policy and state law. Any proceeds resulting from such disposal are to be used for the improvement or care of the collections.

An appropriate instrument of conveyance, executed by the donor or agent of the donor and MCHS, shall be obtained for all bequests accepted into the collections in accordance with MCHS procedures.

### Purchases

Items may be purchased for the historic structures, artifact, archival and library collections and library materials. MCHS will not purchase archaeological collections. Purchased items must follow MCHS purchasing procedures and be accompanied by a bill of sale (MCHS purchase order or vendor's invoice). If a third party is involved in the purchase, the original bill of sale is to accompany the document recording the transfer of ownership of the item(s). These documents, or copies, will be placed in the permanent acquisitions file.

### Exchange

Historical artifacts may be acquired through exchange with another not-for-profit educational institution only if MCHS and the other institution believe the transfer to be in the best interests of both repositories. The institutions will follow proper deaccessioning procedures as outlined by their respective Collection Policies, and will fully document all aspects of the exchange. Formal appraisals may be required to ascertain the equality of the transfer, and all exchanges will require approval by the Collections Committee and the Board.

### Surface Finds

MCHS sites have a long history of human occupation. Visitors and staff members have found and will continue to find artifacts on the ground due to natural soil erosion. Archaeological artifacts found on MCHS property will be accessioned into the historical artifact collection. They do not require approval by the committee or the Board. They will be documented according to procedures established by the curators of collections.

### Excavation

The archaeological collection is added to through excavations on MCHS property or systematic excavation by MCHS staff or other professionals on non-MCHS property in compliance with state and federal law. Archaeological collections do not require the approval of the committee or Board.

## Non-Documented

From time to time, historical artifacts will be found in the possession of MCHS for which no documentation can be found. MCHS will first try to determine if the items are on loan. If the items are determined not to be on loan, they will be classified as “non-documented” and added to the collection.

## DOCUMENTATION AND CARE

### Documentation

MCHS is committed to the prompt recording of all collection management actions, detailed documentation of all items in the collections and the preservation of records and materials in its care. Historic structures, artifact and archival materials and archaeological collections are managed by the Collections Unit. All items being considered for acquisition will be identified utilizing a nomenclature system common to the museum profession, such as the Revised Nomenclature for Museum Cataloging. For gifts, a receipt describing the donation will be given to the donor when the item is left with the MCHS. This receipt acknowledges MCHS’s responsibility for the artifact(s), which will be cared for in the same manner as any collection item. Any item not accepted by the Collection Committee or the Board will be returned to the owner according to procedures. The actions of the Collections Committee will be recorded, distributed and maintained by the recording secretary.

Upon acceptance by the committee and Board, the donor will receive a Deed of Gift, transferring title and, if applicable, copyright to MCHS. With the approval of a donation, purchase or exchange, accession records will be generated within one month. Cataloging and photography will follow as expeditiously as staff time allows. Non-documented items will be investigated in an effort to find records. Documentation will follow approved procedures. All records will be maintained by the Collections Unit. All items added to the collections will be numbered according to the systems in place for each collection.

Library materials will be cataloged and classified by Collections Unit or other designated Museum Programs staff.

### Care

MCHS recognizes its responsibilities to preserve and care for its collections. Responsibility for collection care lies with the professional staff and the Collections Committee, as does the responsibility to request condition improvements and required treatment.

Basic activities will be performed routinely to maintain and monitor collection condition. The Collections Unit will work with the maintenance staff to establish schedules of routine building inspection. A housekeeping program will be established to provide for the cleaning of collection, exhibition, and storage areas.

Collection objects are not to be handled by the public except under guidelines established by the

Collections Unit and Interpretation Unit. Guidelines for handling of collections by interpretive staff are to be established. Food and drink are not allowed in any collections storage area. Public consumption of food and drink is prohibited in exhibit structures except those designated by administration. Food and drink will be allowed only where there will be minimum impact on collections.

## DEACCESSION

Subject to the approval of the Collections Committee and the Board of Directors, items may be deaccessioned from the collections of the Milwaukee County Historical Society.

Deaccessioning is exercised by MCHS after careful deliberation and with caution. MCHS considers the needs of the collection, the best interest of the public, the donor's wishes, the clarity of title, the tax status of the item, and the fiduciary responsibilities of the Board. Once a decision to deaccession is made, the method of disposal also is considered carefully.

### Criteria

An object can be considered for deaccession if any of the following conditions are met:

1. The object fails to fall within the MCHS collecting scope.
2. The object constitutes an unnecessary duplication of other collection materials.
3. The object's condition has deteriorated beyond usefulness, the item has been damaged beyond repair, or the item's condition endangers human life or other items in the collection.
4. The authenticity of the object has been refuted because it is not what it was purported to be or is a fake, or the item's research or intrinsic value has been significantly altered due to poor restoration.
5. The object lacks provenance.

### Considerations

Title: The Milwaukee County Historical Society must have clear title for any item it may consider for deaccession. Any legally binding restrictions contained in the original terms of the gift or bequest regarding disposal will be followed. In cases where no gift agreement or other documentation of acquisition exists or can be found, the material is considered unclaimed, undocumented, abandoned property and deaccessioning may proceed after public notification as defined in XX.

Responsibility: The recommendation to deaccession an item will originate from the MCHS Curator of Collections. Recommendations will be presented to the Collections Committee by the curator following procedures established by the collections staff. The Committee's decision to recommend deaccession will be submitted by the director to Board.

Disposal: Deaccessioned items will be disposed of in a manner most beneficial to the public should the original donor not wish to have the object returned.

Methods of disposal may include: donation or trade to a nonprofit educational institution, public sale, or destruction. Preference is given to the placement of an object with a public institution wherein the object may serve the purpose for which it was initially acquired by MCHS. It is preferable for material that is part of the historical or cultural heritage of the State of Wisconsin to remain in the state. Deaccessioned items may not be acquired for other non-educational MCHS uses, such as to furnish offices or housing units. Private sales or gifts to individuals are not permitted. Any sale of deaccessioned items will be publicized. Deaccessioned objects will not be sold in MCHS museum stores.

Proceeds: All proceeds from the sale of deaccessioned collections of MCHS will be placed in a restricted fund to augment and preserve the collections. The original donor of any deaccessioned artifact will be listed as a contributor to the purchase of a new acquisition.

Exemptions: MCHS will not deaccession items lost or destroyed, and will not reassign accession numbers, files or other documentary references of lost items.

Records: The MCHS Collections Unit shall maintain a file of all deaccessioned items, including a description, the circumstances of its removal, means of disposal, and photographs. All catalog records pertaining to deaccessioned items will be updated indicating the method and date of disposal. Accession numbers, files, or other documentary references to deaccessioned objects will not be reassigned.

## LOANS

As part of its professional responsibility to make its collections available to the public, the Milwaukee County Historical Society may lend objects from, and accept loans to, its collections.

Both outgoing and incoming loans will be for periods of not more than one year, though the loan agreement may be renewed on a yearly basis should the borrowing institution or MCHS require the artifacts for a longer term.

All loans will be presented by the Collections Unit, renewed by the Collections Committee and approved by the director.

### Outgoing Loans

Type 1: Items from MCHS artifact, archival and archaeological collections may be lent to any institution which meets the American Association of Museums' definition of a museum (i.e., a non-profit institution essentially educational or aesthetic in purpose, with professional or volunteer staff, and capable of maintaining objects). Borrowers are required to demonstrate high professional standards in their interactions with other museums and historical agencies and in their care and treatment of objects. Archival manuscript collections may be loaned to qualified archives or libraries. Collection items may

be loaned to an institution whose purpose is not educational or aesthetic if the purpose of the loan conforms to the educational mission of MCHS and the treatment of the items by the institution complies with the American Association of Museums standard facilities report. Institutions borrowing for exhibition purposes will be required to submit a standard facility report and a brief statement of exhibit methods. Library materials are circulated to staff members and qualified researchers at the discretion of the curator of research collections, but will generally not be loaned outside MCHS.

Type 2: Items from the collections may be lent to private individuals or organizations that are not open to the general public, if they meet the following conditions:

1. Items may be lent to an individual when that loan is at the request of MCHS for the conservation, restoration, research or identification of the item. In these instances, the person to whom the item is being loaned fulfills the criteria established in the conservation section of the Collections Policy. MCHS will maintain insurance on all items lent for research, conservation or restoration. A facilities report will not be necessary. Any proposals for such a loan shall be made in writing for review by the collections committee and approval by the director. The request shall minimally include an item description, purpose of the loan, benefits to MCHS, the loan period, transportation and storage conditions and the names and resumes of involved individuals.
2. Items may be lent to a craftsperson or a manufacturing concern for reproduction only when all of the stipulations established in the reproduction section of the Collections Policy are met.

Loan requests are to be presented by the Collections Unit to the Collections Committee. The purpose and conditions of each loan must be presented along with any restrictions. All recommended loans require approval by the director.

Criteria (All apply to both the Type 1 and 2 loans, except where noted):

Items will be considered for loan only if all of the following conditions are met:

1. Removal of the items from MCHS does not significantly diminish interpretation, exhibition or research during the period of the loan.
2. The item is in stable condition and will not be damaged by shipment, exhibition, use or a change in environment.
3. The object will remain in the condition it was received by the borrower and will not be unframed, removed from mats, mounts or bases, cleaned, repaired, retouched or altered in any way without the written permission of MCHS.
4. The borrowing institution or individual will be able to provide adequate physical care of the object insuring it against loss, damage or deterioration.
5. Type I only: The borrowing institution provides proof of insurance, including wall-to-wall coverage subject to standard exclusion throughout the loan period unless the loan request originates with MCHS. MCHS shall be named the beneficiary. The borrowing institution must

demonstrate its ability to safeguard the item while in transit and during exhibition or other use, in accordance with acceptable museum standards.

6. The item has been properly accessioned and bears a permanently assigned identification number.

7. A condition report on the item is prepared prior to the loan

8. Type 1 only: All handling, packing, transportation and insurance costs incurred during the loan are to be paid by the borrowing institution.

9. A credit line citing "Milwaukee County Historical Society" will be displayed with all loaned items placed in a formal exhibit and included in any publication accompanying an exhibition at MCHS discretion.

10. Approval of a loan does not grant any photographic, publication or reproduction rights, which must be negotiated separate from the loan following established procedures.

11. MCHS reserves the right to recall any items during the loan period.

12. The borrower must agree to the conditions outlined in this policy and other conditions specified in the loan agreement. Any exceptions or additions must be approved by the director prior to the completion of the loan agreement.

### Incoming Loans

Loans shall not be accepted when they place a burden on MCHS facilities or staff. All collection items accepted for loan by MCHS shall be covered by an incoming loan agreement form which specifies the terms, use and dates of the loan. In addition, proof of ownership and the manner in which an item was collected or acquired may be required.

Items may be borrowed from another institution or a private individual. The borrower must be made aware of the purpose of the loan and how the item will be used.

All loan requests must be reviewed by the Collections Committee and approved by the director.

The lender is required to place an insurance value on the item(s) and insurance in this amount will be covered by MCHS, unless other arrangements are made between MCHS and the lender.

### Criteria

Incoming loans may be made under any of the following conditions:

1. The item is required for use in the exhibition or interpretive programs of a site.

If the loan is for a one-day program and the item is not continuously in the custody of the lender, an incoming loan agreement is necessary.

2. The item is needed for research purposes, reference or study at the site.
3. The item is needed at MCHS for study as a model for a facsimile reproduction.
4. The item is deposited at MCHS pending consideration of acquisition by gift or purchase. Insurance determination or waivers are to be established with the owner at the time of the loan.

## INVENTORY

As part of its ongoing program of collection management and care, the Milwaukee County Historical Society will periodically inventory all collection items. The inventory is to be conducted by the Collections Unit, following the schedule and guidelines in the Collections Procedures.

## CONSERVATION

Conservation is the treatment of an artifact to protect, preserve and maintain its condition and integrity. Conservation includes examination, treatment, preservation and documentation with respect to the existing aesthetic, historic and physical integrity of the artifact. All conservation is reversible and does not modify the known character of the artifact.

Conservation of collection items may be performed only by MCHS collections staff trained in such work or by an outside individual or institution conversant with, the *Code of Ethics and Standards of Practice of the American Institute for Conservation of Historic and Artistic Works*. The staff collections conservator will coordinate all in-house treatments according to established procedures.

The curator of collections will approve any conservation treatments to be completed by contract personnel. Collection items may be lent for conservation to conservators who aspire to the American Institute for Conservation of Historic and Artistic Works "Standards of Practice." The conservator will be asked to provide a written treatment proposal, estimate and conservation report. All proposed treatments are to be explained to the collection staff and agreed upon in a written contract.

All conservation work on an object will be fully documented and the report filed with the object record.

## REPRODUCTION

Reproductions may be made of original photograph, prints, paintings and other graphics following the photographic reproduction procedure.

Reproductions crafted or manufactured from items in the collection for interpretive use will be marked as

a reproduction, recorded with a reference to the accession number of the collection items they replicate and afforded inventory control. The catalog records of the original item should note that a reproduction of the item was made, when and by whom.

Requests for commercial reproduction of an item by an outside vendor or crafts person must be in writing. The request should state whether the new item is to be a reproduction or an adaptation. All requests to reproduce items in the collection will be reviewed by the Collections Committee and approved by the director.

Items selected for reproduction will be placed on loan to the crafts person or manufacturer. All conditions for an outgoing loan are to be observed, including the completion of a condition report.

All of the following guidelines will be met for the reproduction of any item from the collections:

1. Items may not be dismantled in any manner or subjected to invasive technical analysis for the purpose of reproduction.
2. The condition of the item to be reproduced must be such that it will not be damaged by the process.
3. All reproduction items must be marked as reproductions.
4. The director has the right to examine and approve the quality of the reproduction.
5. Items intrinsic to the daily interpretation of a site may not be removed from the site for reproduction purposes. All necessary measurements and photographs must be done at the site.
6. Items made by licensees will be subject to licensing requirements of MCHS as approved by the Board.
7. The borrower must sign a reproduction agreement indicating adherence to all reproduction stipulations.

## **PUBLIC ACCESS AND DISCLOSURE**

The Milwaukee County Historical Society holds its collections in trust for the public. The collection exists for the benefit of all for the advancement of knowledge, and will be as accessible as possible while maintaining proper security and environmental conditions for the objects. The collections are open to researchers or interested members of the public under the supervision of appropriate staff members. Every effort will be made to accommodate researchers and the public, but MCHS reserves the right to limit access based on the physical condition and security requirements of the artifacts.

Collections will be available to the public through exhibitions, either Society-sponsored or by loan to

other institutions, and through publications and electronic media.

Scholars and special interest groups will have access to historic and archaeological artifact and archival collections, reference materials and appropriate finding aids by advance appointment with the Collections Unit following established procedures. Library materials may be shared with researchers as appropriate and feasible. When feasible, MCHS staff will respond to telephone or written inquiries for collections-related information.

Collections may not be used for personal reasons by MCHS staff, Board members, Society members, volunteers, or their families or representatives. Collections may not be used by any group or institution for political or non-education functions.

Access to the collections and activities associated with access will occur following all the conditions outlined below:

1. Access to collections is secondary to preservation.
2. All who request access to collections not on exhibition are required to complete the access to collections form, stating their purpose and type of access requested.
3. Authorization for access will lie at the discretion of the curator of collections. Refusal may be appealed to the director.
4. No item from the collection may be moved from site premises unless all the conditions for an outgoing loan are met.
5. Collection items will be made accessible based upon the condition of the item and the availability of resources at the site.
6. As part of their accessibility, items may be measured, photographed, or photocopied in compliance with appropriate procedures.
7. Any request for access to collection records will be governed by the same criteria as the access to the collection item. Any records made accessible will shield, as allowed by law, the name of the donor, the value of the item and the stored location.
8. Any request for reproduction of objects, including photographs, must comply with the appropriate guidelines and procedures.

The full text of this Collection Policy will be made available to donors, the press or others upon request. Excerpts from the accession, deaccession and loan sections may be printed as part of the appropriate forms, and will be explained to donors, borrowers or lenders before each form is signed. Acquisition and deaccession activity will be fully disclosed to any interested parties.

## EXHIBITION

Beyond collecting and preserving material culture, the Milwaukee County Historical Society interprets this history in both gallery and historic site formats, so the public can experience the objects in settings indicative of their use and place in society.

Exhibition is the primary means by which the public has access to the collections. MCHS acknowledges that exhibition of collections within a historic site format places objects at greater risk than in a gallery situation. Therefore, MCHS will exercise a special responsibility to care for and exhibit the collections placed in its trust in a manner which ensures the preservation of the objects, and respects the objects and the traditions of the peoples who produced them.

All attempts will be made to protect exhibited collections from physical harm, disaster and natural agents of deterioration. Guidelines and procedures will be established for exhibition, monitoring and maintenance, disaster preparedness and environmental control.

## SECURITY AND INSURANCE

The Milwaukee County Historical Society recognizes the irreplaceable nature of the collections it holds in trust for the public, and is committed to developing comprehensive preventative security and risk management programs. MCHS will continue to develop and refine security and disaster plans for all locations and collections to minimize the potential for loss or damage. These plans will contain detailed, specific procedures for theft and disasters including fire, flood, storm, vandalism, terrorism and power failure. These plans will be used to instruct all site staff. All staff working in areas where collections are exhibited or stored are charged with security responsibilities relating to collections access and the presence of potentially harmful materials. Security and fire detection systems will be installed where necessary, and the Collections Unit will conduct regular inspections and inventories of collections on exhibit and in storage.

Though insurance cannot replace the artifacts or original buildings in the collections, it can provide funds for conservation or restoration in case of a disaster. MCHS maintains a combination of insurance policies and self-insurance for its collections, and retains the option of purchasing special policies for borrowed artifacts or exhibits. MCHS staff will review insurance policies regularly to ensure adequate coverage is maintained. The curator of collections will review those policies pertaining directly to the collections and will recommend any necessary changes to the director.

Insurance values assigned to individual collection items are at current market replacement cost. Collections personnel must be capable of determining market value and/or be knowledgeable about the sources available for determining market value.

## CODE OF ETHICS -- COLLECTIONS

The Milwaukee County Historical Society and its staff and volunteers recognize that to maintain public confidence in and support for the purposes of this institution it is necessary to adhere to a high standard of

professional and personal conduct. The institution will follow the ICOM *Code of Professional Ethics* (1974, 1983, 1986) and the AAM's *Museum Ethics* (1978) as guidelines for ethical behavior. Several sections in these works deal directly with collections, and therefore deserve to be mentioned in this Collection Policy.

The core of a museum is its collection. Research projects, exhibits, and educational programs should all stem from the collection and serve to enhance its value. An artifact's importance derives from its context – documentation about provenance, use, acquisition, and history must be preserved in an orderly and retrievable form, and must be transferred to our successors in good, if not enhanced, condition.

The development of a personal collection is an important method of extending professional knowledge. However, staff members and Board members must be aware of the possible conflicts of interest involved with collecting artifacts related to the museum's collections. Employees and Board members should not compete with the institution in any collecting activity, and the institution has the right to purchase, at the price paid by the individual, any artifact that falls within MCHS's collecting scope added to a personal collection. This right extends only to items acquired during the course of the individual's association with the institution, and does not include personal gifts and bequests made and accepted in good faith.

MCHS will preserve complete documentation of these transactions which states the vendor, the date of purchase, and the original purchase price and purchase price in the museum's permanent files. To avoid the perception of a conflict of interest, MCHS will not purchase artifacts included in a personal collection before or added after the individual's affiliation with the institution.

MCHS must make every effort to avoid conflict of interest. To this end, employees, volunteers and commissioners may not borrow MCHS's collections for personal use, nor may these individuals or their representatives acquire by any means any artifact deaccessioned by the MCHS. Artifacts from a personal collection will not be stored in the institution's storage facilities unless the items have been loaned to MCHS for a specific purpose.

Dealing is defined as the purchase and sale of objects for personal gain. Staff members, volunteers and commissioners will not deal in objects similar or related to objects collected by the institution during their association with MCHS.

The Milwaukee County Historical Society supports the efforts of the archaeology profession to stop the looting of archaeological sites. MCHS will not purchase, sell or trade archaeological items. The proper authorities will be notified of any attempt to sell artifacts of questionable or illicit origin to MCHS.

Collections documentation and research completed by staff members for MCHS belong to the institution. Scholarly papers given or manuscripts written as part of the staff member's job will be owned by the institution as set forth under the works-for-hire doctrine of Title 17, USC. As the owner of the staff member's work under this act, the institution will consult with the employee before publishing or otherwise publicly releasing such work. Research, manuscripts or papers completed on a staff member's personal time belong to the staff member.

Institutional collecting should not be a competitive activity. Museums must co-operate with other institutions with similar interests to insure that important artifacts and documents are placed in the repository best able to care for the pieces. MCHS will not collect any artifact unless it fits within the scope of this collection of this policy and can be documented and cared for according to professional standards. Donors offering artifacts that do not meet these conditions will be referred to other institutions. MCHS must rely on the expertise of the staff on collections-related decisions.

The Milwaukee County Historical Society will not license reproductions from the collections without the advice of the Collections Committee. All reproductions produced for commercial sale will be closely monitored to insure standards of quality and advertising which will not reflect poorly upon the institution. Interpretive staff members may make reproductions of collections items for use on the sites as part of their interpretive activities, but may not sell the items for personal gain.

### **REVIEW AND REVISION OF COLLECTIONS POLICY**

In acknowledgement that this policy will require revisions to meet the ongoing needs of the Milwaukee County Historical Society and that professional standards for collections management will continue to evolve, the MCHS Collections Policy will be reviewed on a regular basis.

At least every five years the Collections Committee will review the policy and prepare revision recommendations considered necessary. The final draft will be presented to the committee for approval by the director. Once approved, the revised policy will govern all collection management actions at MCHS.

All collections procedures are also to be reviewed periodically, especially after any revision of the policy, to ensure that all aspects are in compliance with the policy. The revision of procedures will be made by the Collections Committee and submitted to the director for approval.

## DEFINITION OF TERMS

**Accessioning:** The process of creating an immediate, brief and permanent record of an object, assembly or lot from the same source at the same time for which the museum has custody, right or title and assigning a unique control number to an object, assembly or lot. To accession an artifact implies permanence; a museum only accessions those items it intends to keep.

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

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

**Deaccession:** The action of removing an accessioned object by due process from the permanent collection or from deposit by legal means. The process is thoroughly recorded in a register.

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

**Inventory:** The registrarial process locating and listing periodically accessioned, loaned and borrowed objects by location, resulting in locator files.

**Manual, Collections:** A professionally prepared set of guidelines, directives and formats describing how to establish, implement and maintain informational control over collections by various means.

**Muniment:** Written documents preserved as evidence of ownership of an object or collection, often comprising deeds, bills of sale, wills, agreements, correspondence and acknowledgements

**Plan, Collections:** A curatorial inventory, analysis and evaluation of each class of collection held by a museum and utilized to direct predetermined acquisition and deaccession with specific goals and objectives in mind.

**Policy, Collections:** An approved, written statement of beliefs that provides a guidance system to achieve organizational purposes, objectives and responsibilities and adopted by a governing board or authority.

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

*Adapted from Daniel R. Porter III, "Current Thoughts on Collections Policy: Producing the Essential Document for Administering Your Collections," Technical Report #1, AASLH, 1985.*