

Collections Management Policy

BAR HARBOR HISTORICAL SOCIETY

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Bar Harbor Historical Society Mission

To effectively display, preserve, and interpret Bar Harbor's rich past through our unique collections ensuring access, enjoyment, and educational opportunities for all.

Scope of Collection

The collection of the Bar Harbor Historical Society is a cultural one consisting of archives, textiles, and objects. The collection spans the history of Bar Harbor from its incorporation in the late 18th century through the present. The collection provides a window into Bar Harbor's rich and diverse history. Our collection allows the local community, and its visitors, to experience and enjoy their own history, and to gain a deeper understanding of the cultural footprint of Bar Harbor.

Collection Categories

Permanent Collection: Archives Textiles and Objects

The most significant part of the BHHS collection. The Archives are made up of the primary-source accounts of the town's history, its citizens, and the organization. Objects are non-document artifacts. The “permanent” in this collection does not refer to the permanency of the objects and clothing that make up the collection, but rather the permanency of the collection itself as a core part of fulfilling the BHHS’ Mission. Items in this collection have been accessioned by the Collections Committee.

Education Collection

Objects are used for educational experiences and are meant to be handled by the public. These items are durable and replaceable/replicable, due to the tactile nature of their interpretation. All objects in this collection must have an active educational use or belong to an active educational program. This collection is managed by both the Collections and Experience teams and is non-accessioned.

Exhibit Prop Collection

This collection supports other collections. “Props” are objects that do not necessarily meet the BHHS mission or fall within the scope of the collection but can be used in interpretation to create a more complete experience or in literal support (i.e., holding or shelving on period furniture) of objects from other collections. All props must have an active use in an exhibit or other support functions. This collection is non-accessioned. *Please see Prop Addendum for more information.*

Reference Library

The research library is made up of bibliographic secondary-source materials that are used to provide scholarly structure to the BHHS’ other primary collections. This library is open to staff and researchers, who may use books and other documents to underpin interpretation and research conducted at the museum. This collection is accessioned.

Bar Harbor Historical Society Collections Ethics Policy

Conflicts of Interest

1. No officer, director, staff, or members of their immediate household may knowingly compete with the BHHS for items it has decided to acquire, whether at auction or from any potential seller or donor.
2. No officer, director, volunteer, staff, or members of their immediate families, nor any other associated person may remove any artifacts from the museum nor commingle their personal collections with those of the BHHS, without the written permission of the Executive Director and Collections Manager. All non-BHHS-owned objects must be logged in and out, even for temporary exhibits or assessments.
3. All Board members, staff, and volunteers must read, complete, and sign a Conflict of Interest Form annually. This form will be kept on file in the headquarters of the BHHS and made available to any members of the Board of Directors upon request.
4. If an officer, director, volunteer, or staff member engages in any activity that is considered a conflict of interest, this is grounds for action by the Executive Committee of the Board of Directors and/or removal from the organization.

Personal Collecting

It is the understanding of the Historical Society that Board of Directors members, staff, and volunteers maintain personal collections. These collections come in a variety of shapes, sizes, and degrees of overlap with the mission and scope of the Bar Harbor Historical Society's collections. These cases of collection overlap pose several challenges for both the organization and the individual collectors, including unnecessary competition for objects and archives, acquisitions and loans from the individual, and other ethical dilemmas. For this reason, the Board of Directors, Collections Committee Members, staff, and volunteers during their tenure with the organization are expected to act in the best interest of the Society and refrain from competing with BHHS for items that fall under the BHHS mission. Additionally, to the best of their ability, stakeholders are expected to disclose when a purchase or acquisition might intersect with the BHHS mission or be an actual or apparent conflict of interest before the purchase or acquisition is finalized. This does not prohibit any of the aforementioned individuals from collection outside of BHHS' scope (e.g., collecting items from surrounding Islands, or items with no relevance to Bar Harbor, Maine), but an annual inventory of personal collections that may relate to BHHS's mission should be submitted to the organization for review for items acquired during the previous year or for the duration of their tenure. These inventory dues are due by the start of the new year, annually. A group including one executive board member, two other board members, a member of staff, and a volunteer representative, shall be assembled to review and address these personal inventories if they present an actual or apparent of conflict of interest. Members must recuse themselves during the review of their personal collections.

Additionally, no item from a personal collection of a member of the Board of Directors, Staff, or Volunteer will be displayed in the museum on loan or a temporary basis. Acquisitions from governance authority members, staff, and volunteers are considered in accordance with all other provisions of this Policy. Individuals must recuse and remove themselves from discussions about their donations. The use of museum resources to store or care for personal collections is prohibited.

Appraisals and Authentication

Members of the Board of Directors, Staff, and Volunteers are prohibited from offering any form of appraisal or authentication for a potential donation/acquisition. Property owners must seek a third-party appraiser if they wish to know the value of their items for tax or insurance purposes. While the BHHS does provide deeds of gift for donations, these are not confirmations of value, nor will they mention the monetary value of the donation.

Collections Development

Temporary Custody

The Bar Harbor Historical Society may take temporary custody of objects in order to assess them for acquisition, eventual accession, examination, research, and identification. Temporary custody does not mean that legal title or ownership has been transferred to the Society, and the terms for each custody are established in the Temporary Custody Form and Questionnaire.

Only collections staff members are authorized to take objects into temporary custody. Objects eventually destined for the archives, object collections or other non-accessioned collections may be taken into temporary custody and be further evaluated. Loans are handled separately from objects in temporary custody.

Collections staff maintain records of temporary deposits including Temporary Custody Form and Questionnaire. In cases of newly abandoned property (i.e. an object left on a staff member's desk or the Museum's doorstep) a temporary custody form should not be completed, but the object should be photographed where abandoned, documented, and handled according to Maine State statute Title 27, §601 *Property Deposited with Museums*.

Abandoned and Undocumented Property

Title 27 § 601 does not differentiate between abandoned (property with a known owner or lender who is unreachable or refuses to come to collect their property) and undocumented property (items with no source documentation, owner, or other information). In these cases, after several attempts at contacting the object source, if known, and after the object has been with BHHS for more than three documented years, a public notice must be taken out for two weeks in the Mount Desert Islander or Ellsworth American. See the Title 27 § 601 Abandoned Property Notice template.

If 65 days pass after the last notice is published and no owner has come forward, the BHHS owns the advertised property. The item may be accepted or declined for the collection in accordance with the Accession Criteria section of this Policy. If declined by the Collection Committee, it can be disposed of in accordance with the Disposal section of this Policy, and these items remain non-accessioned.

Accession Criteria

Bar Harbor Historical Society will accession acquired items into the collection based on Committee approval of objects recommended by Staff. Accessioned objects have been brought into one of BHHS' permanent collections or archives, and BHHS has assumed full responsibility and ownership of the item. This process differs from the incoming/outgoing loan process and temporary custody given to acquired objects, as in those cases ownership does not transfer to the museum.

Authority

- 1) The Board of Directors has the ultimate authority to delegate responsibility for development and stewardship of the collections.
- 2) The Collections Committee recommends to the Board of Directors objects for accession, deaccession, and disposal. The Collections Committee adheres to the policies and procedures outlined by the BHHS, as related to the Collection Committee *Statement of Purpose*.
- 3) The Collections Committee is composed of self-nominated members as approved by the Board, and a Collections Team staff liaison. It must meet at least six times a year. The Chair, or their designated alternate, may call meetings. Staff liaisons are non-voting members of the committee. All Committee decisions are by simple majority vote [*see BHHS By-laws*].
- 4) The Collections Team (CT), comprised of BHHS staff appointed by the Executive Director, has the authority to recommend objects to be collected. They will determine acquisition budgets for those artifacts that they deem appropriate for addition to the collection. Any expenditure for a single item exceeding \$1,000 requires approval of the Executive Director and the Collections Committee [*see Collections Purchasing Procedure*]. Any expenditures exceeding \$2,500 also require approval of the full Board of Directors, per the BHHS Finance Policy.

Criteria

- 1. The object must have a clear connection to the town of Bar Harbor and its history.**
 - a. Objects made or used in Bar Harbor should be considered.
 - b. Items from Mount Desert Island where BHHS is the most appropriate repository.
- 2. An object should be in good condition and be as complete as possible.**
 - a. A worsened condition due to historical events is different from a deteriorated condition due to neglect or abuse.
 - i. As an example, an item damaged by the fire of 1947 is different from an item damaged by being kept in a wet basement.
- 3. Rare items should be considered regardless of damage, as there may not be another opportunity to collect another version of it.**
 - a. Rare items are those defined as items that display a clear connection to Bar Harbor's history, while being difficult to acquire, either due to a lack of duplicates or due to cost.
- 4. Items must be considered for management issues.**
 - a. Is there enough space in the collection storage rooms?
 - b. Does the object require specific preservation techniques?
 - c. Does the object require immediate conservation attention?
 - d. Will movement harm the object, from simple movement into storage or shipping on loan to another facility?
 - e. Is the object sturdy enough for display? For how long?
 - f. Does the object pose a threat to the other objects in the collection?
- 5. Objects are non-hazardous and legal to own, display, and transfer.**
- 6. Duplicate and redundant items should be considered at a lower priority than items unique to the collections.**
 - a. Objects that are already represented in the collection but have unique provenance or are representative of another gap in the collection (i.e., time period or social context) will be considered as unique.
- 7. Object sources must be able to prove that they have a legal right to transfer ownership of the object in question.**

8. **The object must fill a gap in the collection. This gap could be object type, social context, or time period.**

Objects should be researched as part of the staff recommendation process. This research should pay special attention to provenance, cultural patrimony, and relation to the BHHS mission. Safety and sustainability should be at the forefront of every collection discussion and decision. It is highly recommended that collections committee members request outside expertise in cases of hazardous materials, cultural patrimony, and legal ownership concerns. The Bar Harbor Historical Society is prohibited from collecting or keeping human remains of any kind.

Deaccession

Deaccessioning is a process in which objects are removed from the permanent collection or archives for the health and longevity of BHHS' collections. Deaccessioning is done in an analogous way to accessioning, where upon staff recommendation the Collections Committee will review staff research and vote for or against deaccessioning. It is the responsibility of the Collections Team to routinely review the collections for possible deaccessions, and to provide a well-supported recommendation for such. Ultimate authority for deaccessioning lies with the BHHS Board of Directors who have delegated the review task to the Collections Committee. The Board of Directors receives reports from the Collections Committee about their activities and approves or rejects their meeting minutes. Bar Harbor Historical Society may deaccession objects from the permanent object and clothing collection and from the archives if they meet one or more of the following criteria:

- 1. Object has limited or no connection to the town of Bar Harbor, its history, or the Bar Harbor Historical Society's mission.**
- 2. Objects in poor condition or whose incompleteness damage their interpretive value.**
- 3. Objects that are redundant within the collection are comparably represented by objects of better condition or value already in the collection.**
- 4. Objects which are too large, hazardous, or damaged for BHHS to adequately care for them.**
- 5. Objects which are illegal or unethical to own, display, or transfer.**
- 6. Objects without clear provenance or represent a cultural patrimony outside of BHHS' scope of collections.**
 - a. In the cases of cultural patrimony, the object should be exclusively returned to an authority under said patrimony. Please see *Disposal* for more information.
- 7. Objects that would be better suited to the educational collection, research library, or prop collection.**
 - a. For the prop collection specifically, objects need to be in suitable condition for display but have limited relevance to Bar Harbor History or the BHHS mission.
- 8. Object has been accidentally accessioned twice or has other administrative error requiring deaccessioning (i.e., lost objects, objects with a disconnected or lost identity)**

Disposal

Once an item has been approved for deaccession, it will be disposed of. Disposal in this context does not mean throwing the object into the trash; rather, it means removing it from BHHS custody. At the time of deaccessioning the Collections Committee will suggest two (one preferred and one backup) methods of disposal to be realized by staff. Approved methods are:

- Transfer to another internal collection, i.e., Exhibit Props or Education Collection
- Transferring ownership, through donation or sale, to another history organization, museum, or library
- Sale of an object through public auction
- Transferring, through donation, to an organization or other authority who may better care for the cultural patrimony of an object. (For objects related to the First Peoples of the region the Abbe Museum should be the first point of contact).
- Transfer back to the original source if required by a restriction in place at the time of accession.
- Destruction or transfer based on federal, state, or local laws and regulations.
- Witnessed destruction; well-documented destruction witnessed by one collections staff member and one other internal stakeholder rendering the item useless and unrecognizable.

Any profit gained from the disposal of deaccession objects must be used for collection object acquisition or the direct care of BHHS' collections, all other purposes are prohibited.

Collections Information

Documentation and Collection Records

Authority

The Bar Harbor Historical Society Board of Directors has the ultimate authority to delegate responsibility and stewardship of the collections and related records. The Collections Committee has the authority to recommend objects for accession, deaccession, and possible disposal to the Board of Directors. The Collections Committee shall adhere to the policies and procedures outlined by the BHHS, as related to the Collection Committee *Statement of Purpose*. The Collections Team, as instructed by the Executive Director, handles the day to day care of the BHHS collections. Managing documentation and collection records is delegated to the Registrar with support from the Collections Team Other specific responsibilities, such as the handling of IRS documents, are detailed below.

Records Retention and Document Series

Bar Harbor Historical Society (BHHS), maintains orderly, comprehensive, legible, permanent records for all objects in its custody. The Registrar and Curator are responsible for compiling and maintaining these records. This includes incoming loans, objects in temporary custody, and permanent collections.

Records must be kept using archival techniques and preservation materials. The records are written in approachable, plain language with limited use of jargon and non-expanded acronyms. Each record is completed in total and typed. Additionally, these records are to be treated with the same level of care and respect as BHHS accessioned archival collections.

Below is a list of each document series kept by the BHHS. A scan of all files is kept on the BHHS Collection Team hard drive, which must be backed up monthly. All files are organized by accession number, loan number, or pre-accession temporary custody number.

1. **Entry Records-** Records of receipt, temporary custody forms, Information of object source and provenance, copies of related wills/bequests, shipping documents
 - a. All documents are expected to have the date and time of entry/arrival, Source contact information, staff responsible for filling out this form, and staff and source signatures.
2. **Accession Records-** minutes of the committee accessioning the object, signed deed of gift or purchase signed by object source, record of transaction unique accession number, related abandoned property advertisements, associated IRS records, cultural allowances, copyright permissions and other licenses, and associated description of the materials included in the transaction.

- a. All documents must have the date of record, museum contact information, staff or committee chair signatures, a brief description of the materials included in the transaction, cataloger information, and the transaction's unique accession number.
 - b. For records that contain vital financial information, such as IRS records, the Treasurer of the BHHS Board of Directors must be made aware and sign off on the documentation.
3. **Catalog Records-** The paper catalog sheet is complete with all pertinent information and marked with its unique Object ID number and an entry into BHHS' collection management software for the object.
 - a. All related fields are expected to be completed on catalog records. Records are also expected to have the date of cataloging and the date of the object's accession, the object's unique accession number, and cataloging staff/volunteer information.
4. **Location and Movement Records-** Records of the object's storage location, display location (if applicable), and records of movement between storage, conservation, display, etc. This is recorded in BHHS' collection management software.
 - a. All location and movement records are expected to have the date and time of movement, the object's unique accession number, detailed origin and destination, staff/volunteer responsible for the move, and reason for the movement. Movement records for outside of La Rochelle/BHHS' main facility also require staff contact information, staff signature, and management approval and signature.
5. **Treatment Records-** Records of conservation, preservation, care, related incident reports, and use in research.
 - a. Records are expected to have at least the date and time of treatment, detailed description of treatment, and names of involved parties (including researcher and institution if applicable), the object's unique accession number, and staff signature.
6. **Loan Records-** Incoming and outgoing loans must have the documentation listed below; they will additionally have copies of the loan documents signed by both parties with a description of the loan period, copies of the insurance related to the loan, descriptions for special care (if applicable), and other supporting loan documents.
 - a. All records are expected to be completed in their entirety with staff and management signatures where appropriate.
7. **Deaccession and Disposal Records-** Records on staff recommendations for deaccessioning, records of committee minutes deaccessioning the object, method, and record of disposal, and receipt of return (if applicable).
 - a. All documents must have the date of record, museum contact information, staff and committee chair signatures, a detailed description of the object and method of disposal, and the object's unique accession number.

Exhibit Records

Additionally, exhibit records are kept for each exhibit installed in the museum. Exhibit Records are kept in the Exhibit/Experience office and on the Collections Team hard drive. These records include but are not limited to:

1. List of objects in each exhibit and the evolutions of this list as changes are made, e.g., check for conditions, rest periods, or expand in the exhibit scope.
2. Exhibition Script, or the text that is used in the exhibition and the evolutions through re-writes and as the selections of objects/archives change.
3. Loan agreements for specific objects or archives and their versions through negotiations (another copy of loan documents are be kept in the object folder)
4. Budget and versions
5. Related correspondence, phone/zoom call notes (if applicable), related emails.
6. Public Facing Collateral Materials, or the material advertising, guiding, etc., the public through the exhibit and the evolutions for these materials.

Document Retention

Collections Records are kept for the duration of object custody and then for a minimum of seven years after the object's deaccession, disposal, or return to the object's source. Accession, the most recent paper Catalog Record, Loan Records, and Records of Deaccession, are kept permanently.

Inventory Policy

Authority

Inventories are one of the Registrar's primary responsibilities, and their management is vital to the longevity and security of the Bar Harbor Historical Society's (BHHS) Object and Clothing Collections. This responsibility is delegated from the Executive Director and the Board of Directors, who have ultimate stewardship responsibility for the Collections. The process should be routinely audited by the Executive Director and the Collections Committee Chair (as a proxy for the Board of Directors) to make certain that the inventories are operating correctly, are mission relevant, and are creating a greater understanding of BHHS' Collections. The Executive Director and Collections Committee Chair report to the general Board of Directors about the inventories' progress and any issues that arise.

Complete Inventory

The Bar Harbor Historical Society will complete a wall-to-wall inventory every 10 years. This will be done by completing a rolling inventory of 10% of the collection annually. This inventory should include details about the following:

- 1) Location
- 2) Accession number
 - a) Object Title and description should also be included for unnumbered objects, objects that do not have their number affixed to them, or in cases where there is doubt about the accuracy of their accession number.
- 3) Condition (including housing condition)
- 4) Object Medium/Category
- 5) A basic documentation photograph

These annual inventories should be conducted by at least two staff members/volunteers. The Registrar is charged with managing the workflows and inventory staff, including their own, as well as coordinating schedules and budgets for the project. At the end of each calendar year, the Registrar will submit a report to the Board of Directors documenting the collections inventoried during the preceding year, issues that arose and their solutions, and any adjustments made to inventory procedure. They will also submit a brief plan for the upcoming year's inventory as well as a primary budget, schedule, and potential grant/funding opportunities.

Spot-Check Inventory

The Registrar and the Executive Director/Board President (depending on availability) will conduct these spot checks to ensure the long-term security of BHHS Collections and ensure the annual partial inventories are functioning smoothly. Quarterly, the Collections Manager will substitute for the Registrar in these Spot Checks to provide further redundancy.

Once per month, twenty random objects from the collection will be selected by the Bar Harbor Historical Society's collection management software. Spot-check inventories contain less detail than the annual rolling inventories and only include:

- 1) Location
- 2) Accession Number

Missing Items

Items found to be missing from their recorded storage or exhibition locations should be immediately recorded and submitted to the Registrar and the Executive Director by the end of the day. The inventorying staff and a member of management should attempt to locate the item based on its past records and tag the item as missing in the CMS. If the item is not recovered within six months, the matter should be reported to the Board of Directors. Although human error should always be the first assumption when an item is missing, internal/external theft should not be discounted. Depending on the value of the item, the rigor and recentness of its location record, and the object's vulnerability (size, type of display/storage, use in special projects, etc.), this timeline can be expedited, and law enforcement/other authorities can be contacted as to stave off potential threats to the collection.

Other Issues

If condition issues arise during an inventory, such as pests or object degradation, the Registrar and another designated collections team member must be notified by the end of the day of the discovery. In issues of condition, the Collection Manager will take the lead to prevent any further harm.

Objects that are in the incorrect location or otherwise do not have appropriate records (See *Documentation and Collections Records* for more information) must be reported to the Registrar in the end of the day report. Cases of incorrect location should be remedied as soon as possible and should be treated like other object movements by filling out a movement record and should be noted in the inventory log and on the CMS. In cases of missing records or objects Found in Collection (FIC) the process may be much lengthier. First, an attempt at locating or reassociating the object's records should be made. However, if no such records can be found after six months, please see the FIC section in *Property Abandoned with the Museum* section of this policy.

Collections Data and Digitization

Bar Harbor Historical Society Board of Directors is ultimately responsible for the collections, including the information/narratives that describe those collections. To fulfill this responsibility, the daily duties associated with creating and maintaining this information are delegated to the Collections Team. The Registrar or Digital Archivist (if filled) is responsible for the regulation and publication of collections information. These responsibilities also include training staff and volunteers on proper procedures and the importance of “clean” data, which is data that is uniform, machine readable, and most importantly, accurate. The Collections Team are responsible for maintaining entries into the collection management system about collections and exhibition objects.

BHHS is a member of the History Trust Alliance, a consortium of other regional museums and libraries. As a member of this organization, BHHS participates in a shared digital collections platform. This shared collection management system (CMS) is part of a greater effort toward regional shared, linked data and involves a standardized set of forms. These standardized forms cannot be changed by BHHS, and if a change is required, after discussion and approval by the Collections Team, the History Trust liaison will be presented with the proposed change to the Alliance at the next meeting for discussion.

It is critical that robust, accurate data sets are kept for all objects, archives, and clothing in the permanent collection. As there is an ongoing effort to re-associate BHHS collections with their provenance, some objects will have their data improved over time. BHHS and other History Trust Alliance members use Nomenclature 4.0 as the controlled vocabulary for the collection to improve consistency in description across the database. Collections information is kept in three places: In the physical collections records, on the CMS shared with the History Trust, and on a monthly backup of BHHS data kept on a local hard drive. *Please see the Cataloging Manual for details on the types of information retained on the CMS and information about the controlled vocabulary.*

Collections Access

Incoming and Outgoing Loan Policy

The Bar Harbor Historical Society (BHHS) Board of Directors has ultimate authority and responsibility for the stewardship of the BHHS Collection. For outgoing and incoming loans, stewardship is delegated to the Executive Director and the Collections Team. The Collections Team is responsible for reviewing incoming and outgoing loan opportunities and vetting them. The Registrar is responsible for the administration of incoming and outgoing loan agreements with support from the Curator and management support from the Executive Director. The Registrar and the Collections Manager, as a team, may deny, request the return of, or perform emergency conservation work (as allowed by Maine State Statute Title 27 § 601) any incoming or outgoing loan or inquiry if the conditions of the loan agreement are not or cannot be met.

Additionally, loans, borrowers and lenders that pose a conflict of interest or the appearance of a conflict of interest should recuse themselves from the discussion about the approval of their loan, including Board of Directors members, Committee members, and Staff that have financial or familial responsibilities to potential lenders (See *Collections Ethics Policy* for more information).

All loans, whether incoming or outgoing, are made on a temporary basis and should be reviewed for renewal annually, at a minimum.

Incoming Loans

Incoming Loans, or loans where BHHS borrows objects from another party, are accepted for exhibition, research, or special programming purposes. BHHS does not accept loaned property for storage or in anticipation of a future bequest. Typically, the Curator or Collections Manager conducts preliminary research into a potential loan, including object information, provenance information, and any loan fee information, and presents their findings to the Registrar. The Registrar will review the research for viability and help fill in any gaps in the research before presenting the opportunity to the rest of the Collections Team.

If the Collections Team agrees, as a group, to pursue the incoming loan, a written inquiry should be made to the potential lender. This inquiry should include:

- Use for solicited object(s)
 - Incoming loans must be used for educational purposes
 - If the object is planned for display/exhibition, the condition of such exhibit should be described in the inquiry.
- Complete contact information for the potential lender
- Dates of use (initiation, installation, and return) are at least 90 days in the future.
- Provenance and other title information
- Cultural and critical historical details for the solicited objects.

- Information on BHHS' insurance, conservation/preservation capabilities, and other pertinent facilities information
- Rights, Reproductions, and other legal considerations explanations [Will BHHS allow photographs in the display space? Will the BHHS use the objects in any marketing materials?]
- Willingness and understanding to pay any potential loan fees, shipping/transportation costs, and other related costs
 - Expenditures over \$1,000 require the approval of the Executive Director, and expenditures over \$2,500 require the approval of the Board of Directors per BHHS Finance Policy.
- Special considerations for the requested object(s).

BHHS will insure incoming loans unless specifically requested by the lender.

Restrictions on display, including exhibit design, must be pre-established by the lender. Right and reproduction restrictions, use in research, and other restrictions critical to the lender are also expected to be pre-established before the loan agreement is complete and the object(s) are transported. It is best for both parties if an open channel of communication is kept open throughout the loan term to ask and answer any questions that may arise. All lenders must provide an alternate contact in case of emergency or if BHHS cannot reach the initial contact person.

Once a loan has been approved by the lending organization, shipping/transportation, use, and other details have been negotiated and agreed upon, there should be no delay in transporting the object(s) to the museum. A detailed condition report, including photography, should be produced by the Collections Manager and sent to the lender upon the object(s)' arrival and acclimation to the museum no later than 48 hours.

For more information on incoming loans that have been with the museum for an extended time and whose initial lender is unreachable, please see this policy's *Abandoned and Undocumented Property* section.

Outgoing Loans

Outgoing Loans, or loans where another party borrows from BHHS, are approved for use in exhibitions, special research, or special programming/traveling exhibitions. BHHS only approves loans to non-profit organizations, government agencies/organizations, academic organizations, and other museums. Loans solicited by for-profit companies, individuals, or solely for decorative purposes will be denied. The purpose of the BHHS collection is to grant access to Bar Harbor's rich history while also ensuring that history is preserved and cared for.

For an outgoing loan to be successfully solicited by a potential borrower, the borrower must send a loan inquiry in writing. Staff will review the inquiry to ensure that it matches with the following parameters:

- Organizational standards outlined above
- the conservation and preservation needs of the requested object(s) can be met by the potential borrower,
- the object(s) have an educational planned use, which is thoroughly explained
 - That use follows BHHS' ethical standards and aligns with federal, state, and local restrictions.
- The potential borrower is aware of the costs and expectations associated with the loan, including carrying the insurance, shipping/transportation cost and logistics, photography, etc., for which the borrower is responsible.
- The initiation, installation, and return dates are preestablished and achievable.
- Rights, Reproductions, and other legal considerations are to the satisfaction of the Collections Team.
- Special considerations based on the value of the requested objects (s), cultural significance, and condition [Did this organization do thorough research before inquiring about the requested objects?]

If the inquiry meets all or most of the standards above, the Curator ensures that the object is not required for any in-house purpose (e.g., it is not currently on a major exhibit or used in special research), and the Collections Manager ensures that the object(s) are fit for transportation and display, the loan should be approved, and negotiations should begin. The Registrar will coordinate with the borrowing institution. The BHHS maintains that it may withdraw outgoing loans at any point if the object(s) are not being properly cared for, the object(s) are being used for a different purpose than originally agreed to, or the other violation of the loan agreement.

A pre-transportation conditions report will be prepared by the Collections Manager before the objects are transported to the borrowing institution. Another condition report, including photography, is expected from the borrowing institution within one week of the object(s) arriving and acclimating to the facility. A signed receipt of arrival from the borrower, which includes both the borrowing party's main contact's signature and the signature of the party responsible for shipping/transportation, is expected within 48 hours of the planned arrival. Failure to meet these conditions without justification may result in a violation of the loan agreement and withdrawal of the object(s).

Special Circumstances

Rarely, for off-site events and educational purposes, BHHS may give temporary responsibility for specific collections object(s) to specific employees akin to an outgoing loan. These loans will have the following restrictions:

- No more than ten (10) objects

- A team of two (2) employees, one of which must be a member of the Collections Team
- No longer than 24 hours
- Within Hancock County

This type of loan is handled on a case-by-case basis for the facilitation of special programming and community relationships. The Collections Committee must approve all special circumstance loans to oversee the safety and security of the objects involved. One of the two responsible employees must stay with the loaned objects at all times, and both employees are expected to remain on-site for the entirety of the loan, except for transportation to and from the event. The Registrar is responsible for the logistics associated with such loans and seeking Collections Committee approval. The Collections Manager will oversee the physical transportation of the object(s) to and from the event location.

Stored Collection Access

It is essential to the Bar Harbor Historical Society's (BHHS') mission that its collections are accessible to a wide audience. While exhibits represent an important part of this mission, stored objects, archives, and clothing must also be available to members of the public for research. The Collections Manager is charged with the responsibilities associated with public and researcher access to stored collections.

BHHS offers a broad range of collections on its digital collections portal. Within this digital collections portal, BHHS retains sensitive information about its object donors, genealogical information, and other matters of cultural significance. It is the BHHS strict policy not to publish, for public consumption, information about donors, object sources, sensitive genealogical information, or sensitive matters of cultural significance outside of what is required by law, specifically requested by the object's source or cultural group, or what is available on public record. Some of this type of sensitive information can only be accessed physically on-premises and only at the discretion of the Collections Manager. BHHS digital portal should also refrain from publishing details about the object's storage location and other related information to prevent any potential security risks.

Physical Access

Requests to physically access the collection must be made at least one week in advance of the anticipated access date. The stored collection is available to the following groups:

- Researchers
- Members of associated cultural groups, specifically for access to related cultural objects
- Genealogical researchers, specifically for access to related familial objects
- Citizens of the Town of Bar Harbor, Maine

The Collections Manager grants access in response to specific requests based on the above criteria, objects requested, and (if applicable) past experience with the researcher in the BHHS archives and collections rooms. Researchers are expected to treat collections of objects with care and respect. Researchers who damaged collections items, removed items without explicit permission, brought food, drink or other potentially damaging substances into collections spaces after staff warning, or otherwise conducted themselves in a dangerous or disrespectful way after staff warning may no longer be welcomed into stored collections spaces.

While it is in the best interest of the BHHS and its commitment to the public trust to approve most access requests, specific object requests may be denied for the following reasons. Object is:

- Too fragile for handling
- Undergoing active conservation
- Involved in other BHHS programs/projects (exhibits or on loan)
- Copyright or reproduction rights barriers
- Specific cultural or religious considerations

BHHS may also deny access to documentation containing sensitive information, including donor contact information, valuation information, storage location, and other similar information. Destructive Sampling is prohibited unless required by law.

Collections Care

Physical Collections Care

The ultimate authority of collections care resides with the Bar Harbor Historical Society (BHHS) Board of Directors. The day-to-day responsibilities of collections care and preservation are delegated to the Curator with support from the rest of the collections Team. All care performed for the BHHS collections should adhere to professional standards and align with the ethical and legal requirements outlined elsewhere in this policy.

BHHS is committed to upholding the highest level of care and preservation for its collections. BHHS is also committed to maintaining a preservation environment through environmental controls, such as temperature and humidity controls, conducive to the continued conservation of the collections. To this end, the Curator will also oversee the use of collections spaces for collection (e.g., storage or exhibit) and non-collection (e.g., events or educational program) uses. The Curator will also execute the pest control policy.

Preservation and Conservation activities are also to be undertaken by the Curator. While BHHS does have some limited in-house facilities for active preservation and conservation, it is understood that complex objects with higher needs may require a third-party professionally trained conservator. In these cases, the Curator will act as the primary liaison and head of the project, with the conservator assisting with identifying the care required and potential conservators. The Registrar will assist with the logistics, such as packing, transportation, and project documentation.

Food, beverage, gum, and smoking/vaping are strictly prohibited in collections spaces.

Digital Collection Care

Bar Harbor Historical Society possesses a small collection of born digital items, including oral histories and other interviews. These items are accessioned collections items and given the same level of care as physical originals outlined above in this policy. Born digital items are cataloged, numbered, and managed using the same principles. Additionally, because BHHS' born-digital assets include oral histories and sensitive personal information, extra care should be taken to protect the privacy of those associated with the objects.

For the digital surrogates of collections objects, e.g., scans of ledgers or photographs of objects, the care should closely align with the care for other supporting documentation for collections items. Please see the *Documentation and Collections Records* section of this policy. In both cases, digital assets are backed up regularly. Access copies, which are copies derived from the original master copy, are stored separately. The files are named in accordance with the naming convention established in the cataloging procedure.

Risk Management

Ultimately, the Bar Harbor Historical Society (BHHS) Board of Directors and Executive Director are tasked with managing the overall risk for the organization. The Executive Director and Collections Team, namely the Registrar, are responsible for creating and maintaining a specialized collections emergency response plan as a part of BHHS overall emergency response plan. The Board of Directors should review and approve this plan every two years to ensure that it remains accurate to the current state of the facility.

Insurance

BHHS' collections are generally covered under a wall-to-wall insurance plan. Items worth over \$25,000 in fair market value are covered on additional item-specific riders. Objects on incoming loans are also typically covered on the wall-to-wall policy unless otherwise specified. Outgoing loans are typically covered by the policy of the borrowing institution unless otherwise specified.

Risk Mitigation

The Registrar is tasked with keeping an accurate list of collections objects and their fair market valuations. Additionally, as the Registrar is responsible for the BHHS' rolling inventory, they are also tasked with monitoring the collections spaces for evidence of theft or vandalism. If theft or vandalism is suspected, a report should be made to the Executive Director by the end of the day. To this end, the Registrar is also responsible for coordinating an annual site visit of the appropriate emergency services and maintaining that relationship.

The Collections Manager is responsible for ensuring the safe use of collections spaces, with assistance from the Curator and Registrar for display and non-display spaces, respectively. These parties will also fully assess the spaces annually for risks and present an updated risk management plan to the Executive Director. All staff are responsible for securing the building and collections room using the alarm system when entering and exiting the building.

Emergency Preparedness

In case of emergency evacuation, the Collections Manager is responsible for clearing all non-display collections rooms of personnel, and the curator is responsible for clearing display spaces. Both will work together with other staff members to ensure a calm and swift evacuation of the building, if necessary. If safe to do so in an emergency that requires sheltering-in-place, the Collections Manager will secure all non-display collection rooms.