RESOLUTION NO. 2009-605

Adopted by the Sacramento City Council

September 29, 2009

CHANGING THE NAME OF THE SACRAMENTO ARCHIVES AND MUSEUM COLLECTION CENTER (SAMCC) TO THE CENTER FOR SACRAMENTO HISTORY AND APPROVING A NEW COLLECTIONS POLICY

BACKGROUND

A. SAMCC's Mission is to foster, stimulate and promote the study and appreciation of Sacramento's regional history by acquiring, preserving, exhibiting and providing access to the documentary and material culture of the area while providing the highest level of public service.

B. SAMCC originally was founded in 1953, as the repository and research center for City and County historic collections. These collections are held in the public trust and reflect the many aspects of the social, political, geographic, and cultural history of the Sacramento region.

C. Changing the name of the Sacramento Archives and Museum Collection Center (SAMCC) to the Center for Sacramento History will better define the organization by its mission and the services it provides, and making it more recognizable and accessible for the public. The name change defines the role of the Center for Sacramento History as the repository of collections and intellectual content.

D. Updating the center's current collection policy aligns SAMCC's policies with the national standards followed by collecting institutions across the country. The revised policy establishes lending procedures, collection acquisition and de-accession procedure, and updates forms for deeds of gift that will help to strengthen the organization's credibility with sister organizations.

BASED ON THE FACTS SET FORTH IN THE BACKGROUND, THE CITY COUNCIL RESOLVES AS FOLLOWS:

Section 1. The City Council approves the name change of the Sacramento Archives and Museum Collection Center to The Center for Sacramento History

Section 2. The City Council approves revisions to the City's Collection Policy shown in Exhibit A.

Section 3. The City Council delegates the amendment procedures to the Collection Committee with approval of the Director of Convention, Culture and Leisure Department.

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Exhibit A – CSH Collection Management Policy

Adopted by the City of Sacramento City Council on September 29, 2009 by the following vote:

Ayes: Councilmembers Cohn, Fong, Hammond, McCarty, Pannell, Sheedy, Tretheway, Waters, and Mayor Johnson.

Noes: None.

Abstain: None.

Absent: None.

Mayor Kevin Johnson

Attest:

Shirley Concolino

Shirley Concolino, City Clerk

Exhibit A

CSH COLLECTION MANAGEMENT POLICY

Developed by the staff of the Center for Sacramento History (CSH), the following collection management policy articulates how the Center will pursue its mission and goals through its collection activity.

1. MISSION STATEMENT

The Center for Sacramento History's mission as a public agency is to illuminate and promote the exploration and analysis of the social, political, geographic, and cultural history of the City and County of Sacramento from their founding to the present, by collecting, preserving, exhibiting, and making accessible the documentary and material culture of the diverse region.

2. DESCRIPTION OF COLLECTIONS

Founded in 1953, the Center for Sacramento History (CSH) is funded by the City and the County of Sacramento and is the repository and research center for City and County historic collections. These collections are held in the public trust and reflect the many aspects of the social, political, geographic, and cultural history of the Sacramento region.

The collections held at CSH include both three-dimensional museum artifacts and archival records (public documents, and manuscripts and personal papers). The Center's museum collections document Sacramento material culture – the tools employed, the clothing worn, the art enjoyed – and showcase the great diversity that calls the region home. Within the archival collections are the official records of City and County government and the Superior Court of Sacramento County, and manuscript collections of prominent individuals, families, businesses, organizations, and community groups of the Sacramento region. The Center thus serves as a "total archive" in documenting all aspects of the city and county's history. CSH's holdings are open for research and available for display at accredited institutions that meet the center's security and environmental requirements.

2.1 Museum Collections

CSH holds in trust some 30,000 three-dimensional museum artifacts as varied as the people who have lived, worked and played in the Sacramento region. Documenting daily life in Sacramento, the museum collections include household items, furniture, toys, quilts, and costumes. The working life of Sacramentans, from miners and farmers to artists, merchants and clerks, is represented in farming tools, office equipment, dredging machinery, photography equipment and works of art. Other artifacts include: one of the first facsimile machines, a variety of vintage neon signs from area businesses, horse-drawn carriages, a 1903 curved-dash Oldsmobile, printing presses, and remnants of buildings torn down during redevelopment projects in the region's urban core, such as a complete flat from the c.1915 Merrium Apartments. The Center's museum artifacts have been exhibited at community

sites, such as Sacramento City Hall, Sacramento Public Library, and Sacramento International Airport, as well as at the Sacramento History Museum, the California State Railroad Museum, the California Museum for Women, History, and the Arts, the Getty Museum, the Autry National Center, and the Oakland Museum of California.

2.2 Archival Collections – Public Documents

CSH's public documents date from 1849 and provide users with the most complete set of local public documents of any archives in California. By City and County of Sacramento statute, the Center is the official repository for public documents of enduring value created by city and county government. These collections of records include the full range of media – from paper and ledger books, to digital databases and computer discs. These official records document more than eighty various city and county departments, divisions, and offices. The documents are transferred to the Center on an ongoing basis under city and county records retention schedules.

City of Sacramento documents held at CSH begin in 1849 and include the various city charters, City Council minutes, ordinances and resolutions, City Clerk records including staff reports, agenda packets, agreements, bids and contracts, and the papers of former mayors and council members. Additionally, the Center has the records of other city departments, such as planning and building, parks and recreation, housing and redevelopment, police and fire, and utilities and public works. The records of the City of North Sacramento before its annexation are also housed at the Center.

Sacramento County documents held at CSH begin in 1850 and include the Board of Supervisors minutes, ordinances and resolutions, Clerk/Recorder filings for property transactions such as deeds, homesteads, and mortgages, and the papers of former supervisors. Additionally, the Center has the records of other county departments such as the assessor, coroner, grand jury, registrar of voters, planning and building, parks and recreation, sheriff, and utilities and public works.

CSH has a nearly complete set of both civil and criminal court filings ranging from the earliest "Court of First Sessions" to the modern Superior Court system. Other court records include naturalization certificates, articles of incorporation, and probate case files.

2.3 Archival Collections – Manuscripts and Personal Papers

The Center actively collects manuscripts and personal papers of individuals, families, businesses, organizations, and community groups that illustrate the social, political, geographic, and cultural history of the Sacramento region. These collections provide unique and vital insights into the past and work in conjunction with the public documents to offer broader details about the region. The wide range of records in these collections – photographs, oral histories, correspondence, recorded performances – supply users with numerous avenues for the information they seek.

Included in CSH's holdings are the papers of Aubrey V. Neasham, historian and driving force behind the Old Sacramento Historic District, Eleanor McClatchy, publisher of the *Sacramento Bee*, and James K. Carr, visionary of public works projects like the Sacramento International Airport. The Hazel Pendleton and May Woolsey Collections chronicle family life in

Sacramento. Business collections include the Natomas Company, the California Almond Growers Exchange, Breuner's Furniture Stores, the *Sacramento Bee*, and Weinstock-Lubin. These records represent the development of agriculture, mining, reclamation, media, and the retail sales industry in the Sacramento region. Collections reflecting organizations and community groups include the Tuesday Club, the Sacramento Mailers Union, the Sacramento Traditional Jazz Society, the Sacramento Pioneer Society, and the Camelia Festival.

2.4 Photographs and Moving Images

CSH holds over five million photographic images, ranging from daguerreotypes of the Gold Rush-era, including the first known photograph of Sacramento, to contemporary prints of area events and scenes. The collection covers nearly all types of photography and formats, including cyanotypes, cabinet cards, carte-de-visites prints, and glass plate, nitrate, and safety negatives. These images come from our public, manuscript and personal records.

Major photographic collections include the *Sacramento Bee* photo morgue and negatives, which incorporate most news assignments covered by the newspaper from the 1950s to early 2000s; Dennis R. Warren, a northern California free-lance photojournalist from the early 1960s until the mid-1980s; Joseph Benetti, a *Sacramento Union* photographer in the 1950s and 1960s; Eugene Hepting, an amateur historian and photographer documenting the Sacramento region from the 1920s to the 1960s; and the McCurry Foto Company Collection, a local studio which operated from the 1910s through the 1970s.

CSH houses a large collection of moving images in film, video, and digital formats. The largest portion comes from KCRA, the Sacramento NBC affiliate, with over nine million feet of film. The raw news footage and edited programs date from 1958 to 1982. The collection has been widely used in documentaries and programs seen on public and cable television, news broadcasts, and at film festivals. Other video and film collections include the Alexander Media Services, Inc., a local production company of programs and advertising, and multimedia artist and Sacramento City College professor Darrell Forney.

The Center for Sacramento History strives to fulfill its mission through the following practices:

- Collecting materials that reflect CSH's mission. These materials have been described above.

- Presentation of exhibitions, acting both as lender and as borrower in the organization of exhibitions held at various locations. Both as lender and as borrower, CSH works with other institutions with a similar vision to the CSH for exhibitions and educational programs. Refer to the Incoming and Outgoing Loan sections for specifics.

- Maintenance of a cohesive and accurate registration system that meets national museum and archival standards and is accessible to a diverse public. This system will allow CSH to be a collector of Sacramento's history and a repository of information to be shared with the public.

- Implementation of an access program to the documents and material culture of the region. The Center facilitates access to the archival collections for research to the

community by appointment. In addition, the Center's website allows searches of the catalogued collections, and links to the Online Archive of California (OAC) and other online databases that contain information about CSH collections.

This policy will conform to the American Association of Museums (AAM) and the International Council of Museums (ICOM) Code of Ethics for Museums, the Society of American Archivists (SAA) Code of Ethics, and to the professional standards set by this organization as it relates to the use of the collections owned or managed by CSH (see Appendices A through G for further details).

3. MANAGEMENT RESPONSIBILITIES

CSH is administered by the City of Sacramento in the Convention, Culture and Leisure Department, and is jointly funded by both the City and the County of Sacramento.

The City Council delegates authority for the management of the collections to the History Manager. The History Manager delegates responsibilities and duties to the Center's staff and to the Collections Committee, as necessary and as described in this policy.

The Collections Committee will consist of the Center's professional staff (Manager, Curator, and Archivists), a Sacramento History Museum Representative, and two representatives from the Sacramento History Foundation. The Committee will evaluate potential acquisitions, de-accessions, questionable loans and decide on collections issues and decisions as described in this policy and always in accordance with the Collections Policy criteria. The Committee will meet at least quarterly.

4. ACQUISTION OF MATERIALS

4.1 Materials will be accepted only if there is intent to accession them into the permanent collection. The Center does not accept materials for custodial care. Materials will not be accepted into the permanent collection with the purpose of re-sale. Materials accepted for re-sale are not part of the permanent collection and fall outside the scope of this policy and the responsibility of the Collections staff at the Center. The Center might accept non-collections objects if the donor is fully informed of the purpose of the donation and made aware of possible tax implications. Any objects accepted by the Center, but not accessioned into the permanent collection will be accounted for with paperwork and counted as an asset.

4.2 Materials might be added by means of gifts, bequests, purchases, exchanges, commission, transfer and abandonment, or by other transactions by which title to the material passes to the Center. Documentation of transfer of title must be obtained. Documentation should at least include a Deed of Gift for gifts, a receipt for purchases, a copy of the will or the pertinent portion of it for bequests.

4.3 A Seller's Warranty is required on purchases over $500. The warranty must state that the dealer is responsible for reimbursing the Center for any costs involved if the title of

the artifact or record is disputed at a later date.

4.4 Bequests should be evaluated according to policy. If the bequest contains multiple materials, the Center should accept it only if it is anticipated that the bulk of the collection would be added to the permanent collection. The Center should evaluate and decide if all or only portions of the materials are to be accepted.

4.5 Additional documentation include photographs, appraisals, copies of de- accession forms if the material is being disposed of from another institution, and all the records associated with the material, particularly if acquired by field collecting. This could include survey forms, provenance catalogs, architectural drawings, cartographic records, photographs, and inventories.

4.6 A museum artifact and/or archival record will be accepted into the Permanent Collection if it:

4.6.1 is in compliance with CSH's mission and collecting goals;
4.6.2 is relevant to CSH's educational purpose and enhances the educational opportunities and resources provided by the Center to the public;
4.6.3 reflects the interests of Center constituencies;
4.6.4 is authentic and of high quality;
4.6.5 will be utilized by CSH within the foreseeable future;
4.6.6 is in a condition that CSH can properly provide for its storage, preservation, and display;
4.6.7 does not result in major conservation and storage expense for CSH, or initiate a new area of collecting without prior approval by the Collections Committee;
4.6.8 has satisfactory provenance and sound title;
4.6.9 there are no known legal or ethical issues associated with the object;
4.6.10 has a reasonable price;
4.6.11 is not a gift with conditions that impose undue restrictions, or place an undue burden on the Center;
4.6.12 poses no hazards to CSH staff, visitors, or other items in the collection.

4.7 Under special circumstances, CSH may accept materials with restrictions or limitations. Only the Collections Committee has authority to approve the special conditions and to make exceptions to the acceptance of materials with restrictions. The approval of these conditions will be recorded in the object file.

4.8 Mixed gifts should be accepted only if it is anticipated that the bulk of the collection would be added to the permanent collection. As stipulated in the Deed of Gift, these donations require clear understanding with the donor on the disposal of non-selected materials after culling has been performed. The donor should be advised if any of the materials are intended for re-sale and the related tax implications.

4.9 CSH will not knowingly acquire or exhibit items that have been stolen or otherwise acquired or obtained unethically or illegally.

4.10 CSH will not accept materials that were recovered in a way that would support or encourage illegal or irresponsible collecting or that would damage or cause destruction of natural or cultural materials and sites. The Center recognizes the unique nature of funerary remains and sacred materials and will consider the legal aspect and the sensitivity issues from cultural groups when collecting materials of this nature.

4.11 The Center will not knowingly accept or purchase any item where title to the item is in question. All transactions will be carried out in an ethical, legal, and professional manner and in accordance to local, national and international laws.

4.12 Legal compliance standards for the acquisition of cultural property are articulated in U.S. laws, including the National Stolen Property Act, the Endangered Species Act, and the Native American Graves Protection and Repatriation Act of 1990. CSH endorses the ethics statements of the American Association of Museums (AAM), the Society of American Archivists (SAA), and to the principles and recommendations of the UNESCO Conventions Concerning the Protection of Cultural Heritage (UNESCO 1970) and the Convention on International Trade in Endangered Species of Wild Flora and Fauna (CITES).

4.13 Approval decisions for accessions are as follows:

The Collections Committee will review and evaluate all potential acquisitions including all donations with restrictions, collections that will result in a major future expense for the institution, and materials offered by Center staff or relatives of staff.

4.14 All acquisitions need to be documented. If the object is offered for acquisition by a member or relative of the Center's staff, board of trustees, or governing authority, the disclosure, discussion, and decision-making process for the acquisition needs to be documented. The committee or staff member associated with the artifact should remove himself or herself from the vote.

4.15 The archival staff is responsible for establishing and maintaining the acquisition records and for completing the accessioning process for public documents, and manuscripts and personal papers, as described in the procedures manual.

4.16 The transfer of City of Sacramento records, as dictated by the City's Records Retention Schedule, falls outside the responsibility of the Collections Committee (see City Resolution 2007-276). Archival staff will work with the City Clerk's Office and the City Records Manager in overseeing the transfer of records from all City of Sacramento departments and agencies.

4.17 Obtaining clear title to items previously accepted into the collections, but not documented, may occur through any legal means, such as abandonment, a contractual reversionary clause, or application of the State of California's Unclaimed Loan Law (California Civil Code Section 1899).

4.18 Donations to CSH are tax deductible. The Center will not make appraisals of any object or collections or pay an outside appraiser to assign valuation on an object donated to CSH for a third party on Center time and/or premises. CSH may place a value on materials for insurance purposes only. CSH can refer the donor to reputable organizations or

individuals to obtain appraisals. CSH will provide at least three names, arranged alphabetically, of appraisers that are competent in the area of the donation. The Center will inform the donors that the referral list should not be considered an endorsement of the appraiser's qualifications. It is the responsibility of the donor to obtain appraisals for tax purposes and to file for tax deductions. CSH will comply with all current Internal Revenue Service rules and reporting regulations for charitable contributions.

When donations offered to CSH fall outside the scope of CSH' mission, CSH will make a reasonable effort to refer the donor to other institutions with similar vision as a possible repository for the donation.

4.19 No committee member, employee, or volunteer will present himself/herself as representing CSH in negotiating or purchasing for personal collections.

No committee members, employees, volunteers, or interns will use or give the appearance of using their positions or the information and access gained from their relationship with CSH for personal gain or for the benefit of their own private collections.

Upon entering into employment at the Center, employees must disclose in writing to the History Manager all areas of personal collecting and agree to refrain from any collecting activities in competition with CSH. Any individual who intends to purchase an item for a personal collection in the same area of collecting as CSH must provide CSH the opportunity to purchase the item first. The Center reserves the right to acquire any object purchased or collected by its employees within a period of ninety days at the price of purchase. The Center's right of acquisition does not extend to materials collected prior to the time of association with the Center or to materials that are personal gifts or bequests.

5. DEACCESSIONING OF MATERIALS

5.1 De-accessioning is the formal process used to remove any material (museum artifacts or archival records), legally and permanently, from the collection. Any material might be permanently removed from the collection if:

5.1.1 it is no longer relevant to CSH's mission and collecting goals;
5.1.2 CSH has full title to the object;
5.1.3 it was accessioned a minimum of two years ago;
5.1.4 it has no restrictions that prevent de-accessioning;
5.1.5 CSH can no longer adequately care for the object;
5.1.6 it is a duplicate and useless for educational purposes;
5.1.7 it is comparable but inferior to another object within the collection;
5.1.8 it is a fragment or portion of an artifact, or part of a set, which is only meaningful as a whole;
5.1.9 it has deteriorated beyond usefulness;
5.1.10 it is not authentic;
5.1.11 it poses hazards to Center staff, visitors, or other items in the collection;
5.1.12 it has donor restrictions that prevent CSH's ability to store, exhibit, or make available for research the collection or artifact(s);

5.1.13 it was acquired in a manner contrary to CSH's acquisition policy;
5.1.14 it was illegally exported from its country of origin;
5.1.15 it is subject to repatriation under the provisions of the Native American Graves Protection and Repatriation Act (NAGPRA).

5.2 Approval decisions for de-accessions are as follows:

For materials that fall within the rules stipulated in the collections policy and representing a cost of $500 or less, the decision rests with the History Manager after reviewing recommendations from the collections staff. Costs include purchase price or any cost associated with the transaction (shipping, conservation, storage, etc...). De-accessions between $500 and $5,000 require the approval of the Collections Committee. De-accessions over $5,000 require approval by the City Council.

5.3 CSH will dispose of an object by the following means, in general order of preference: transfer (donation) or exchange with public or non-profit institution, sale by public auction, repatriation to society of origin, or destruction when degree of deterioration is beyond usefulness. Funds from the disposal will be used for the acquisition of new materials or the preservation of the existing collection. Materials purchased with these funds will credit the original donor in the credit line.

Exchanges will be made only with non-profit institutions, never with individuals. Title will only be transferred to an individual by public auction. Exchanges should be made only for materials of equivalent historic or monetary value.

CSH will follow City and County regulations for the disposal of hazardous materials.

5.4 CSH will make reasonable efforts to notify all donors still living and with a current address of the proposed de-accession actions as a courtesy.

5.5 The collections staff is responsible for recording the approval and method of disposal, then updating the object file.

6. INCOMING LOANS

6.1 A written loan agreement, signed prior to the receipt or shipment of loan materials, shall govern all incoming loans. The decision for approving all incoming loans rests with the lead collections staff in each subdivision and must be approved by the History Manager. The decision should always be in accordance with the Collections Management Policy. The History Manager has discretion to involve the Collections Committee if (s)he elects to do so. In situations where the loan is questioned by any of the collections staff, and an internal decision is not reached, the Collections Committee will be consulted and a decision reached by vote. The collections staff shall maintain complete records of all loans and track loan activity.

6.2 CSH may borrow from institutions, individuals and/or corporations, materials for exhibitions and special programs that enhance CSH's mission. CSH does not borrow materials in order to enhance their market value for the benefit of the lender or to provide

storage benefits to individuals or other organizations.

6.3 The collections staff is responsible for identifying the materials to borrow for an exhibit and obtaining permission to borrow from the lender. Responsibility for all arrangements and logistics of the loan reside with the collections staff. These arrangements include: loan agreement, insurance, packing and shipping, condition reports, monitoring of materials during loan, and receipt and return of materials.

6.4 CSH will not engage in loans of materials that are subject to local, national and/or international laws or conventions protecting natural resources or cultural property.

6.5 The decision for approving all incoming loans must be mutually agreed upon by the collections staff. The collections staff will provide assessment of risks and liabilities pertinent to potential loans and any unusual restrictions placed on an incoming loan by the lender. The collections staff is responsible for ensuring that the logistics of the loan can be arranged in a safe manner for the object.

6.6 Costs incurred in the loan process should be considered before accepting a loan.

6.7 The collections staff is responsible for maintaining all documentation for all loans and for complying with conditions.

6.8 Conditions for incoming loans are:

6.8.1 All loans will be documented in a signed loan agreement with the lender. The loan agreement is the legal document containing the terms of the loan. Only one agreement should be used for each loan transaction. Typically the Lender's loan agreement will govern the loan. The CSH Incoming Loan Agreement form should be used if the lender does not have one.

6.8.2 The loan agreement needs to be signed and dated by both parties.

6.8.3 The collections staff will provide the Lender with a Standard Facility Report (Adopted by the Registrars Committee of the American Associations of Museums in 1998.)

6.8.4 The Lender must certify that it has good title to the object and the authority to lend it. The Lender is responsible for updating CSH of any changes in address or ownership of the object.

6.8.5 Loans are only accepted for the duration of two years. Extensions of one year at a time will be considered if agreed upon by both parties. The Curator of History, in consultation with the History Manager, is responsible for approving any extension. Exceptions to the one-year extension rule must be approved by the Collections Committee. The period of the loan will be specific. CSH does not accept permanent, long-term loans or incoming loans solely for deposit or storage.

6.8.6 The Lender must certify that the materials lent are in such condition as to

withstand ordinary strains of packing, shipping, storage and display.

6.8.7 Shipping and packing methods are determined by the Lender. CSH will follow specific instructions set by the lender in the loan agreement. Materials will be returned to lender in the same or similar packing materials and using the same method as received from the lender.

6.8.8 Lenders must provide initial condition reports that accompany the object(s). Condition checks on receipt and departure from CSH will be made by the collections staff. They will be compared against the initial condition report. In the absence of an initial condition report, the collections staff could arrange for a condition report to be performed by the collections staff or a professional outside source, with prior authorization from the lender. In the absence of a condition report, the Center will consider the condition of the object upon arrival as the original condition of the object. Condition reports might contain visual documentation, which can be used for internal documentation purposes only.

6.8.9 CSH will insure all incoming loans for the full value under CSH' fine arts insurance policy, subject to the standard exclusions. The collections staff will provide proof of insurance to Lender. It is the responsibility of the lender to specify the value for the materials included in the loan. The value must reflect fair market value. If the lender fails to provide a value, collections staff may appraise for internal purposes. This value should not be considered an official appraisal and should only be used for internal purposes.

6.8.10 If the lender decides to maintain its own insurance, CSH must be supplied with a Certificate of Insurance naming CSH as additional insured. CSH does not accept any responsibility for any error or deficiency in information furnished by the lender or for lapses in coverage due to lender's lack of information to CSH.

6.8.11 All materials will be provided with appropriate security and maintained in appropriate environmental conditions, as determined by the loan agreement and according to standards set by AAM.

6.8.12 Loss or damage to a borrowed object will be reported immediately to the Lender. No conservation treatment, alterations, repairs or fumigation will be undertaken without the written authorization of the Lender, except if required for emergency stabilization to prevent further damage to the object.

6.8.13 Responsibility for costs generated by the incoming loan resides with CSH, unless otherwise agreed to in the Loan Agreement.

6.8.14 CSH will return the loaned materials to the Lender only. The Lender is responsible for notifying CSH of any changes in ownership or change of address. In the case of change of ownership during the loan period, the new owner is required by CSH to establish legal right and title to the object.

6.8.15 CSH will adhere to California Civil Code, Sections 1899 to 1899.11,

regarding the return of unclaimed loans. If CSH is unsuccessful in its efforts, including certified mail, to return materials within a reasonable period following the termination of the loan, then the materials will be maintained at the Lender's risk and expense for a maximum of 5 years. If after 5 years the materials have not been claimed, the Lender shall be deemed to have made the materials an unrestricted gift to CSH.

7. OUTGOING LOANS

7.1 A written loan agreement, signed prior to the receipt or shipment of loan materials, shall govern all outgoing loans. The decision for approving all outgoing loans rests with the lead collections staff in each subdivision and must be approved by the History Manager. The decision should always be in accordance with the Collections Management Policy. The History Manager has discretion to involve the Collections Committee if (s)he elects to do so. In situations where the loan is questioned by any of the collections staff, and an internal decision is not reached, the Collections Committee will be consulted and a decision reached by vote. The collections staff shall maintain complete records of all loans and track loan activity.

7.2 CSH will loan to other institutions, museums or organizations for the purpose of exhibition, research, education or conservation treatment, and not for commercial purposes. The CSH lends to further its mission.

7.3 Requests for loans must be received in writing. The request must contain the reason for the request, the duration of the loan, specific materials requested and a Standard Facility Report of the borrowing facilities where the object is to be exhibited.

Loan requests will be considered on a case-by-case basis. Factors to consider are the relevance of the loan to the CSH's mission, the nature and condition of the requested material(s), the specific use, and the borrower's ability to meet professional standards of care for the materials. CSH may lend to museums or institutions that meet professional museum standards for the care of materials. CSH may lend to private corporations for educational exhibition purposes only, if the corporation meets professional museum standards and for no commercial gain. CSH will not engage in advertisement and/or promotion with a private corporation outside the educational purpose of the loan. Materials will not be lent to private individuals.

7.4 CSH must have clear title, or clear written contractual management authority over the materials considered for an outgoing loan.

7.5 All outgoing loans will be arranged and monitored by the collections staff. All inquiries regarding loans should be directed to the collections staff.

7.6 The decision for approving all outgoing loans must be mutually agreed upon by the collections staff and History Manager. The collections staff recommend the approval of outgoing loans for exhibition purposes. The collections staff will provide assessment of risks and liabilities pertinent to potential loans and any unusual circumstance or condition of a loan.

The collections staff should be consulted before any loan is approved to make sure that the logistics of the loan can be arranged in a safe manner for the object.

7.7 The collections staff are responsible for maintaining all documentation for all loans in their designated area of collection responsibility.

7.8 Conditions for outgoing loans are:

7.8.1 All loans will be documented in a loan agreement with the borrower.

7.8.2 CSH's Outgoing Loan Agreement will govern the loan. The loan agreement is the legal document containing the terms of the loan. Only one agreement should be used for each loan transaction.

7.8.3 The loan agreement must be signed and dated by both parties.

7.8.4 CSH must certify that it has the authority to lend the object(s) in question.

7.8.5 Loans are made for a maximum duration of two years. Extensions of one year at a time will be considered if agreed upon by both parties. The collections staff responsible for each subdivision, in consultation with the History Manager, is responsible for approving any extension. Exceptions to the one-year extension rule must be approved by the Collections Committee. The period of the loan will be specific. CSH does not allow permanent long-term loans.

7.8.6 Loans from CSH may not be transferred by the Borrower to any other institution without prior written approval from the CSH. CSH will process a new Loan Agreement with the new borrowing institution before the transfer takes place.

7.8.7 Shipping and packing methods are determined by CSH. The collections staff is responsible for determining packing requirements and method of transportation. The collections staff will make all packing and transportation arrangements or will authorize the borrower to make the arrangements according to the specifications of the collections staff. Materials will be returned to CSH in the same or similar packing materials and using the same method as received from CSH.

7.8.8 CSH will provide initial condition reports to accompany the object(s). Condition checks on receipt and departure from borrowing institutions will be required. This report should be sent to CSH at the end of the loan.

7.8.9 CSH will ensure that all outgoing loans are insured by borrower under an all risk, wall-to-wall fine arts insurance policy, subject to the standard exclusions, for the value established in the loan agreement. The borrower will provide proof of insurance to CSH. Collections staff will ensure that a Certificate of Insurance is on file prior to shipping a loan.

7.8.10 If CSH decides to maintain insurance coverage for the materials, a

premium will be billed to borrower as stipulated in the loan agreement. The collections staff is responsible for updating the insurance records accordingly and notifying borrower of any changes affecting the materials on loan.

7.8.11 Loss or damage to a borrowed object will be reported immediately to CSH. No conservation treatment, alterations or repairs will be undertaken without the written authorization of CSH, except if required for emergency stabilization to prevent further damage to the object. If the object belongs to another institution, CSH will obtain written authorization from Lender before approving any intervention.

7.8.12 All materials will be provided with appropriate security and maintained in appropriate environmental conditions, as specified by CSH and outlined in the loan agreement and according to standards set by AAM.

7.8.13 CSH will retain the authority to rescind a loan at any time if there is a risk to the object(s) or the use of the object(s) is reflecting negatively on CSH or the City and County of Sacramento.

7.8.14 Responsibility for costs generated by the outgoing loan resides with the borrower, unless otherwise agreed to in the Loan Agreement. These costs include: packing, shipping, conservation, courier service, customs, loan processing fee, or any other cost associated with the loan.

7.8.15 For publications and publicity, borrower will follow the conditions set forth in the loan agreement. CSH will receive copies (number to be determined) of any publicity releases or other informational materials dealing with the loaned materials.

7.8.16 Exhibition labels must include the credit line as stipulated in the loan agreement. The credit line will refer to the Center for Sacramento History.

7.8.17 Photography is only allowed for internal documentation purposes. Photography for publication or publicity in any form, including websites, must be agreed to in writing.

8. MATERIALS PLACED IN THE CUSTODY OF THE CENTER

8.1 CSH will accept materials placed in its custody for consideration for acquisition and/or for consideration for display and exhibition. CSH will issue a temporary custody receipt and will store and monitor the materials properly. The Center has the right to photograph materials for examination and tracking purposes and will not treat, restore, alter, or fumigate materials left in its custody. Materials temporarily accepted for consideration for acquisition are not insured under the CSH policy and the responsibility for insurance rests with the owner. Materials in temporary custody will not be catalogued into CSH databases, re-housed or made available to researchers.

8.2 Materials will be assigned a tracking number (temporary number). The depositor will sign a temporary receipt acknowledging the object(s) status and establishing a mutually agreed upon timetable and method for the object(s) return.

8.3 Only the collections staff shall have authority to accept materials in the temporary custody of CSH.

9. CARE OF THE COLLECTIONS

9.1 The collections staff is responsible for the proper care and preservation of the material and its intellectual property. All staff members should understand their role in preserving and protecting the collections as well as the standards CSH has established for the preservation of the materials it owns or manages. When taking care of a collection, the following concerns must be addressed:

9.1.1 The materials must be safeguarded against detrimental elements and damage, such as theft, natural disasters, fire, vandalism, harmful light, temperature extremes, humidity, dirt, etc.

9.1.2 All materials must be stored in a climate-controlled facility where temperature and relative humidity can be controlled and monitored. The materials must be stored in storage equipment and containers considered archival and appropriate to each type of object in accordance with professional standards. In special cases and upon assessment by the professional collections staff, some materials may be stored in a non-climate controlled environment, provided the environment meets minimum requirements for the preservation of the materials.

9.1.3 An integrated pest management program will be implemented to prevent pest infestations and deterioration to the materials in the collection. The collections staff will work in collaboration with facilities management to enforce the program. The collections staff will train janitorial staff in the cleaning of exhibition areas and storage and processing areas. The collections staff is responsible for detecting and identifying infestations, as well as correcting and implementing appropriate treatments. The Center will follow non-chemical means of eliminating pest infestation.

9.1.4 No eating, drinking or smoking is allowed in storage areas or in any areas where collections are held or displayed.

9.1.5 CSH houses a wood shop operated by volunteers. This shop should keep its door closed at all times to prevent dust and dirt from entering the storage facility. Food and drinks entering the shop area should be fully covered to avoid spilling accidents while passing through the storage facility. Garbage in this area should be emptied outside the facility on a daily basis.

9.1.6 Collections staff will train the users of the shop in housekeeping practices according to this policy.

9.1.7 Collections staff will train facilities personnel in housekeeping practices in the storage facility.

9.1.8 Collections staff will train the volunteers and interns in practices relevant to the task they perform and in housekeeping practices according to this policy and the Volunteer and Intern Handbook.

9.1.9 Condition reports must be written when any material enters or leaves CSH, the material is approved for a loan, and/or periodically, as deemed necessary by the collections staff.

9.1.10 Conservation needs should be monitored by the collections staff.

9.1.11 Collections staff must supervise the packing, shipping, handling, and display of all materials on-site at the Center. Collections staff will provide guidance and supervision on the proper handling, security, and other collection procedures to CSH staff and outside vendors as needed.

9.1.12 Collections staff will monitor and record the movement of all materials under the CSH's responsibility. The collections staff is responsible for creating and maintaining records of all transactions involving an object. CSH should be able to account for all materials at any time. The collections staff are responsible for notifying the designated collections staff in any subdivision of any movement of materials. Only staff trained in collections is allowed to handle materials in the collection or in CSH's custody.

9.1.13 Collections are not available to any individual for personal use, on or off the premises, or for any other purpose contrary to CSH's mission.

9.1.14 CSH will adhere to the standards and guidelines set forth by the American Association of Museums.

9.1.15 CSH will maintain an updated Disaster Plan for the safety of its collections and personnel.

9.1.16 The History Manager should be notified of emergencies as soon as possible.

10. RECORDS

10.1 Records will be divided into two categories: registration and curatorial. Registration records will comprise information about the material's current status and maintenance

activity. The curatorial records reflect the material's identity and context within the realm of Sacramento history and culture.

10.2 CSH will establish and maintain an accurate and comprehensive registration system for all loans and exhibitions. All material (artifact or archival record) must have the following attributes:

10.2.1 a unique, permanent number in the case of CSH's artifact collection, or a grouping number in the case of the archives collection

10.2.2 a unique, temporary number (assigned to each artifact or to a group in the case of archival records) in the case of temporary custody

10.2.3 a unique, precise, and comprehensive manual and/or electronic record

10.2.4 cohesive and accurately documented information regarding the object's legal status and/or loan information

10.3 The development and maintenance of a collections management database, containing complete records of the collections, shall be the responsibility of the Collections Staff.

10.4 All curatorial analysis of the collection shall be documented. The collections staff is responsible for providing the information. Copies of analysis records and publications should be maintained by the collections staff in each subdivision.

10.5 Records will contain all appropriate documentation relevant to the materials in the collection, loans and exhibitions, including loan agreement, exhibition agreement, condition report, insurance records, copyrights, permits, licenses, etc. A digital visual image of all museum collection materials will be kept for identification purposes. As permitted by the database, electronic records will include all of the above information. Additional manual records might be generated and should be kept in the collections files.

10.6 Records will be made promptly and filed accurately. A duplicate of the manual and/or electronic records will be made and housed in a secure location. The electronic system will be backed up and stored off-site. No collection records may be removed from the collections office or deleted from the database. Only the collections designated database administrator has the authority to delete accession numbers or information related to materials and only in accordance with the Collections Management Policy and Procedures Manual.

10.7 Materials records are available to the public upon request, however the collections staff will only release non-confidential administrative information and published curatorial information. Information considered confidential, such as shipping and insurance histories, appraisals, tax document and information subject to privacy laws such as donor personal information, will not be available for outside release unless necessary for the Center's operations (such as accounting purposes). Curatorial information considered research in-progress should only be released when considered appropriate by the collections staff in charge of the information and the History Manager.

11. INSURANCE

11.1 CSH insures under the City of Sacramento Risk Management Office. CSH will insure under an all-risk, wall-to-wall fine arts, "blanket" insurance policy, subject to the standard exclusions. CSH will insure materials that it owns (whether on or off premises) for a value equivalent to the maximum probable loss. CSH will insure at full value all materials that it borrows (whether on or off premises) and loans. Materials temporarily accepted for consideration for acquisition are not insured under the CSH policy and the responsibility for insurance rests with the owner, unless special arrangements have been made with Lender, as specified in the loan agreement and/or the temporary custody receipt. The History Manager has the full authority to choose and modify the insurance policy. Additionally, the collections staff is responsible for implementing risk management techniques for the safety and protection of the materials and the Center at large. The City Council is responsible for ensuring resources are available to implement risk management.

11.2 In the absence of any specific lender-imposed requirements, or a release signed by the owner, CSH will insure incoming loans under the terms of its existing policy, as established in this policy. Materials placed in the temporary custody of CSH shall be insured at the owner's expense, unless other arrangements have been made with CSH in writing.

11.3 Unsolicited materials received for loan, or any other reason, will be returned immediately. The sender will be notified that they will be required to supply any insurance desired.

11.4 Any funds obtained through, or by, an insurance claim shall be used for the preservation, conservation, and purchase of collections unless specified otherwise by the History Manager.

12. INVENTORIES

12.1 CSH will perform a comprehensive, wall-to-wall inventory of the collections on site every ten years. Partial inventories will be performed every year on an on-going basis by the collections staff responsible for each subdivision. Additionally, spot check inventories will be implemented periodically throughout the year. The collections staff will be responsible for maintaining accurate records of the materials it owns and of all loans. Loan records must be updated annually.

13. ACCESS TO THE COLLECTIONS

13.1 In striving to achieve its mission, CSH will fulfill its commitment to educate the public about Sacramento history by providing reasonable access to the collections.

13.2 CSH is a public facility and its collections are available to the community for research by appointment. CSH attempts to accommodate diverse constituencies, including researchers, historians, authors, filmmakers, genealogists, students, resource managers, publishers, general public, donors, representatives of cultural groups and employees of City

and County agencies.

13.3 CSH will comply with all governmental regulations regarding access to exhibitions and programs for the disabled in compliance with the American Disability Act (ADA).

13.4 CSH encourages the use of the collections it displays and associated documentation for research, publication, exhibition, and educational purposes.

13.5 Requests for access to the museum collections will be evaluated in light of the applicant's purpose and credentials, as well as on a review of existing and pending departmental priorities and obligations. Requests must be submitted in advance, specifying materials and reason for request. Requestors will be granted access as time permits by appointment. Every effort will be made to provide approved users with timely information and the appropriate level of access to the collections. The preservation and care of the materials will always be a priority in considering access.

13.6 Requests for access to the archival collections is by appointment during the posted research hours. Appointments must be made in advance with patrons specifying as best possible which materials they are requesting. Requestors will be granted access during appointment times in the CSH reading room. Every effort will be made to provide approved users with timely information, the appropriate level of access to the collections (including materials stored off-site), and requests for reproduction of materials. The preservation and care of the materials will always be a priority in considering access and reproduction. Patrons using the archival collections are governed by the Conditions of Use statement and Registration Form, available in the CSH reading room.

13.7 The collections staff determines approval for granting access to the storage areas to volunteers and interns. For security reasons, storage locations are not generally open to the public. A staff member must accompany all tours of exhibition space. Access to collections areas will be supervised at all times by a member of the collections staff.

13.8 No food, drink, or tobacco will be permitted in the collections storage or exhibition areas.

13.9 Photography will not be permitted, unless previously arranged with the CSH.

13.10 Certain collections and their related documents might be subject to cultural sensitivity concerns or designated as sacred, religious or ceremonial. These materials will be subject to specific display and access conditions. All Center personnel will be aware of these conditions. The History Manager will be responsible for complying with specific conditions and will work with the collections staff to comply with them.

13.11 CSH does not conduct appraisals, nor does it release material values to the public.

13.12 Reproductions of the collection for educational purposes and/or non-commercial use will be allowed if there are no donor or legal restrictions on the object and are made in accordance with professional practices.

13.13 Commercial reproduction of materials might be considered on a case-by-case basis.

The collections staff will have the authority for approvals.

13.14 CSH charges fees assessed by City Council for services related to access, use or reproductions of the collection. A current fee schedule shall be posted in the CSH reading room and on the CSH website.