

# Collections Management Policies

## The Iowa Jewish Historical Society

The Iowa Jewish Historical Society (IJHS) is an educational institution. Our mission is to collect, catalogue, house, and preserve the history of the Jewish people of the state of Iowa and to deepen community understanding of Jewish history and culture. This mission is accomplished by:

- operating The Caspe Heritage Gallery;
- preserving historical artifacts and archival material;
- collecting, conserving, exhibiting and interpreting appropriate artifacts and reproductions;
- providing high quality, educational, and enjoyable exhibits and programs for school students and the general public; and
- placing the history of the state's Jews into a regional, national, and international context.

The purpose of this collections policy is to establish procedures and criteria for the acquisition, exhibition, preservation, and management of the Society's collections. This Collections Policy will identify the duties and responsibilities of the Society staff, in general, and the Society's governing bodies.

### 1. INTRODUCTION

- 1.1 Review and Revision.** This policy is to be reviewed by the Collections Committee every three years, and any amendments or revisions to this policy must be formally approved by the IJHS Board of Directors. These policies may be supplemented at any time as approved by the Collections Committee and the IJHS Board of Directors.

### 2. PURPOSE

- 2.1** The collections of the IJHS are developed and maintained to support its preservation and education missions:
- to engage a broad-based audience in the exploration and appreciation of the history of Jewish people of the state of Iowa and to deepen community understanding of Jewish history and culture;
  - to collect, preserve, and interpret the materials, sights, sounds, and ideas that illumine and enliven this history;
  - to present opportunities for life-long learning about this history for the benefit, enjoyment, and education of children and adults; and
  - to provide historical context for contemporary issues and a community forum for thoughtful discussion.

### 3. COLLECTIONS POLICY

#### 3.1 Definitions

- Acquiring refers to the transfer of ownership to the IJHS from another owner. Acquired objects are not necessarily accessioned.
- Accessioning refers to the process of formally adding materials to the Long-Term/Permanent collection—i.e., recording, cataloguing, and processing an addition to the collections of the IJHS. Accessioning of individual objects or collections may also entail the gathering of contextual and provenance data from the donor by the use of written statements or oral histories recorded via audiotape or videotape equipment.
- Deaccessioning refers to the process of formally and permanently *removing* materials from the Long-Term/Permanent collection of the IJHS.

- Artifact denotes an object or other materials produced or shaped by human beings that by its nature or context is considered appropriate for inclusion in the IJHS's permanent collection.
- Prop denotes an object that is useful for educational purposes but is not designated for long-term preservation and, thus, is not included in the IJHS's permanent collection.
- Non-accessioned materials are owned by the IJHS, but the decision to accession or use as a prop has not yet been made.

### 3.2 Scope of the Collections Policy

An important obligation of the IJHS is to keep track of and care for objects and materials that have been entrusted to it. The IJHS divides such materials into five categories:

- **LONG-TERM / PERMANENT COLLECTION:** Objects that meet strict standards of appropriateness and authenticity. By accessioning an artifact, the IJHS takes on the obligation of storing and caring for it in perpetuity. The Long-Term Collection makes up the IJHS's "permanent collection." This collection includes but is not limited to historical artifacts, manuscripts, books, fine arts, and other materials that shall receive the highest level of care.

Objects in this collection will be numbered with the year in which they entered the collection, the number of the accession, followed by the number within the accession (e.g. 2003.001.0001)

An object that has been restored may be accessioned into the collection if the restoration is noted and understood. Donors of objects in need of conservation should be encouraged to provide the necessary funding to restore the objects to a condition in which they can be exhibited.

- **USE COLLECTION:** Objects created or owned for education, exhibition, or interpretation purposes. It is expected that these will be handled and used. They will be discarded when no longer of use to the IJHS. Inventory, record-keeping, storage, care, and disposal of these objects are the responsibility of Executive Director and the staff.

Objects accepted into this collection from 2009 forward will be differentiated by a "U" followed by the number of the accession, followed by the year in which it was accessioned, followed by the number within the accession (e.g. U2009.001.001).

- **ARCHIVAL COLLECTION.** Includes active administrative files, documentary records, photos or media, research files, research reports, or other primary source materials necessary for the preservation and interpretation of the artifacts and materials.
- **BORROWED ARTIFACTS:** Objects borrowed for a fixed length of time from other organizations or private individuals. These must be treated with the same care as the Long-Term/Permanent collection.
- **LIBRARY COLLECTIONS:** Modern reference materials, including books and other published materials, such as serials and periodicals. The Collections Committee will be informed when an object is added to this collection but will not vote on the acceptance of these objects. Also included are materials relating to the maintenance, preservation, and management of the museum, archives, and the IJHS, including but not limited to the following areas of interest: museum collections care and conservation, library and archival science, museum management, etc.

### 3.3 Tools and equipment that support the general operations of the IJHS are irrelevant to this policy and are not referred to as part of the "collection."

- 3.4 Gifts to the IJHS.** From time to time gifts of objects that are unrelated to any of the above categories may be offered to the IJHS. In these cases, the gift is to be accepted, tracked, and managed by the Executive Director, but it is not to be added to the IJHS collections.

#### **4. AUTHORITY/STAFFING**

- 4.1 Statement of Authority.** The Board of Directors of the IJHS is ultimately responsible for the stewardship of the IJHS and its collections. The Board of Directors makes final decisions about policy revisions, accessioning of artifacts, deaccessioning, disposal of deaccessioned objects, and about matters of public controversy that affect the collections.<sup>1</sup>
- 4.2 Collections Committee.** The Collections Committee is a standing committee of the IJHS Board of Directors. It meets at least twice each year to consider staff proposals for accessions, deaccessions, or revisions to this policy and to discuss matters concerning the collections on which the staff requires Board input. The Collections Committee recommends new accessions to the Board and makes recommendations about deaccessioning, disposal of deaccessioned objects, expenditures of funds from the sale of deaccessioned objects, and all matters of public controversy that may affect the collections. Final approval authority rests with the IJHS Board of Directors.
- 4.3 Collections Management.** Collections management is the responsibility of the Executive Director. The Executive Director has front-line responsibility for ongoing documentation and care of the collections. The Executive Director may:
- solicit, accept, or turn down offers for artifact gifts, loans, or purchases for referral to the Collections Committee;
  - make initial determinations of the best, most appropriate use of donated, borrowed, or purchased objects; and
  - recommend accessions and deaccessions to the Collections Committee.
- 4.4.** All actions regarding the IJHS's collections are to be consistent with generally accepted practices of the IJHS and with local, state, and federal codes governing tax-exempt non-profit institutions and tax-deductible gifts of property to such institutions.

#### **5. DOCUMENTATION**

- 5.1 Definition.** Documentation comprises all legal, committee, and managerial records associated with collections objects in temporary or permanent care of the IJHS. Documentation is an ongoing process that exists in a variety of formats including electronic databases and paper files.
- 5.2 General.** The IJHS recognizes that proper recordkeeping plays a crucial role in its mission to preserve and administer objects for the public benefit. The value of documentation is based on the quality, integrity, comprehensiveness, and usability of the records. The IJHS recognizes that proper recordkeeping improves access to the collections, facilitates good management of the collections, and enhances the informational integrity and educational value of the collections.
- 5.3 The Executive Director** is responsible for recordkeeping. The Executive Director will maintain copies of all legal documents pertaining to the collections including receipts, deeds of gift and loan agreements. The Executive Director will also maintain all curatorial records including those that document provenance and interpretive use.

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<sup>1</sup> Throughout this policy, and in keeping with the IJHS's operating procedures, decisions of the Executive Committee may be substituted for decisions of the Board of Directors where immediate action is required and the Board of Directors cannot meet in a timely manner.

- 5.4 Collections Database Records.** The Executive Director is responsible for the development, maintenance, preservation, retention, and upgrading of database collection records. The Executive Director is responsible for entering, updating, and validating curatorial information about objects.
- 5.5 Email.** Staff should maintain printed copies in the files of all email correspondence pertaining to the collections.
- 5.6 Memorial Markers.** Permanent, visible memorial markers shall not be affixed to artifacts; however, such memorial items may be made by written testament in the object records of the IJHS and in mutually-agreed upon signage.

## **6. ACQUISITIONS AND ACCESSIONING**

- 6.1 Definition.** To **acquire** an object is to gain legal title to and physical custody of it. To **accession** an object is to formally accept and record it into the collections.
- 6.2 Purpose.** Artifacts and related materials are collected to enrich interpretation in programs, exhibits, books, etc., for functional use, and to preserve objects for the public benefit. The decision to acquire an object is a permanent commitment of the limited resources of the IJHS.
- 6.3 Methods.** The IJHS may acquire materials by gift, bequest, transfer, exchange, or other means where title is passed directly to the IJHS. Duplicate items may be accepted. The IJHS may purchase an object for the collections if no comparable object may be obtained by gift, bequest, or exchange.

- 6.31 Gift/bequest:** Whether accessioned or non-accessioned, the IJHS accepts only unconditional gifts where clear title can be assured. All gifts become the unrestricted property of the IJHS, which may accession them, exhibit them without accessioning, use them as disposable education materials or exhibit props, transfer them to other institutions, sell them to support the acquisition and care of accessioned materials, or otherwise dispose of them. Accessioning of gifts and bequests occurs upon the approval of the Board of Directors acting on the recommendations of the Collections Committee.

In very exceptional cases, restricted gifts may be approved by the Board.

- 6.32 Purchase:** The IJHS may purchase artifacts for its collections. Purchases up to \$500 may be approved by the Collections Committee. Purchases over \$500 must be recommended by the **Collections Committee** and approved by the Board of Directors. No object will be purchased for the collections unless funds have properly been secured prior to the purchase.
- 6.33 Trade/Exchange:** The IJHS may acquire objects by trade or exchange with other non-profit museums, historic houses, etc. Trades or exchanges involving accessioned collections must go through the deaccession process. For non-accessioned collections, the Collections Committee may approve trades with an outgoing value of up to \$500. Trades valued at more than \$500 require approval of the Board.
- 6.34 Creation by the IJHS:** Objects and research material created by the IJHS may be accessioned into permanent collections with the approval of the **Collections Committee** acting on the recommendation of the Executive Director. Examples of such materials include but are not limited to oral and video histories and reproductions.

**6.35 Transfer from use collections or other IJHS property:** The IJHS may decide to accession materials previously designated as props/use collection and may accession any other objects owned by the IJHS.

**6.4 Criteria for accepting objects to be accessioned in the Long-Term/Permanent collection:**

The Collections Committee shall evaluate potential acquisitions for their primary significance to the mission and/or vision of the IJHS and their relevance to the collections. Other evaluative criteria may include the intrinsic historical or religious importance of the objects, their physical condition, or their relationship to specific collecting priorities established by the Collections Committee in consultation with the Board of Directors. Each accession should be accompanied by a brief statement attesting to its relevance to the IJHS's mission and/or current interpretive objectives.

The title to all donations shall be outright. Objects accepted into the Long-Term/Permanent and Secondary collections should be unencumbered by donor restrictions, title and/or copyright issues, and should be accompanied by satisfactory provenance. The IJHS shall make no commitments as to the exhibition, attribution, or use of the gift.

No objects will be accessioned by the IJHS without strong conviction that the object enhances the mission of the IJHS, will be useful to the interpretation of the mission of the IJHS for the foreseeable future, sufficient space exists for proper storage and care, and is in stable condition and can be maintained in accordance with proper curatorial standards for care and study.

Restricted gifts are prohibited under normal circumstances; exceptions must be approved by the IJHS's Board of Directors and may not include accessioned objects accepted for resale. Certain restrictions on access may be considered by the Collections Committee in consultation with the IJHS Board of Directors.

**6.5 Objects and documents considered for acquisition** by the IJHS will include, but not be restricted to, the following categories:

**6.51** The organization and history of synagogues and temples in Iowa—i.e., articles of incorporation, newsletters, membership lists, photographs, data on rabbis and cantors, affiliation with national organizations, and pamphlets printed for holidays, historical, or other occasions, etc. In particular, the history of temples and synagogues no longer in existence may be pursued.

**6.52** Family histories—i.e., diaries, letters, photographs, personal memorabilia, genealogies, etc.

**6.53** The diversity of Jews in terms of their Old World national origins—i.e., documents, photographs, and objects of Old World origin brought to Iowa by Jewish immigrants.

**6.54** The business, professional and other occupational roles of Jews in Iowa—i.e., records, photographs, manufactured objects, advertisements, etc.

**6.55** The role of Jewish voluntary associations and sodalities in charity, welfare, assistance to the elderly, etc.—i.e., the historical role of Jewish women in charity and welfare activities, records and other materials from municipal or regional Jewish Federations, the Golden Balls held in Des Moines, synagogue and temple brotherhoods and sisterhoods and former and existing landsmanschaftern—fraternal mutual aid organizations, etc.

- 6.56 The activities of Jewish educational programs beyond individual religious schools of temples and synagogues—i.e., Jewish day schools and academies, summer camps, community mini course, etc.
- 6.57 The participation of Jews in interfaith programs in Iowa—i.e., documents pertaining to municipal interfaith groups of clergy or lay people, local chapters of the National Conference of Christians and Jews, projects such as the Ames Jewish-Christian Dialogue, etc.
- 6.58 The role of Jewish media in Iowa—i.e., “The Jewish Press” published in Des Moines; “The Jewish Press” published in Omaha, which includes Council Bluffs, Sioux City, etc.; “The Jewish Spark” magazine, television programs, etc.
- 6.59 The participation of Jews in the political structure of Iowa’s municipal and state governments, Iowa Jews in the United States government, and international entities—i.e., the papers of persons who have served in elective or appointed government roles, photographs, diaries, political memorabilia, etc.

The documentation of Iowa’s Jewish cemeteries, Jewish sections of municipal or private cemeteries, and funeral customs—i.e., photographs, plat maps, inventories of graves, records and objects from Jewish funeral homes or local chevra kadishas—holy burial societies, etc.

**6.6 Criteria for accepting objects for inclusion in secondary collections:** Secondary collections are acquired for educational programs, reproduction collections, or other use. Secondary collections are not accessioned like permanent collections, but are inventoried by the Executive Director.

**6.7 Records.** Records on the acquisition and accession processes and object provenance should be thorough and timely to ensure that original information is retained. A deed of gift, documenting the legal transfer of an object or collection to the IJHS and the acceptance by the IJHS of that donation, shall be signed by the legal owner or the owner’s authorized agent and the President of the IJHS Board of Directors or the Executive Director. The Executive Director is responsible for ensuring that accession and acquisition records are complete and well-maintained.

**6.71 Procedures after acceptance or rejection.**  
 Upon acceptance of the gift by the Collections Committee and the full Board, the Executive Director or designee will send an acknowledgement letter and Deed of Gift form to the donor.

If a donor fails to return the signed Deed of Gift after at least five (5) attempts by IJHS staff to obtain it, including sending a copy by registered mail/return receipt requested, the gift will be processed into the collection if:

- 1) there is a written record from the donor with an expressed intent to donate said object;
- 2) the IJHS has formally accepted the object at one of its meetings; and
- 3) a record is kept of all attempts to obtain the signed Deed of Gift.

An object rejected by the IJHS Board and which is unwanted by the donor will be disposed of by the Executive Director following the instructions of the Collections Committee. Prior to disposal, the donor shall execute in writing an agreement indemnifying Society staff and the IJHS Board of any claim.

If a donor fails to reclaim a rejected object, the right of the IJHS Board to require the donor to withdraw the object shall begin to accrue absolutely on the date of and by mailing a notice to the last known address via certified mail/return receipt requested.

If the donor(s) does not reclaim the object within sixty (60) days from the date of such notice, the IJHS will consider the object abandoned property and will dispose of it.

A Deed of Gift is not drawn up for items acquired by bequest or transfer from a trust: the will or trust instrument establishes the museum's right of ownership to the object(s) and/or materials. The IJHS should receive a **certified copy of the will or trust documents** and issue a receipt for the bequeathed object(s) or transfers from the trust to the executor or trustee of the estate.

If the Board of Directors of the IJHS chooses to accept only a portion of the bequest or transfer from a trust, the Executive Director must so notify the executor or trustee of the estate in writing and sign a partial renunciation. The partial renunciation and all documents and correspondence relevant to the bequest or transfer from a trust must be kept on file at the IJHS.

The Board of Directors of the IJHS reserves the right to refuse any bequest or a transfer from a trust that does not relate to the mission statement or fit within the scope of its collections. In such an instance, the Executive Director, as directed by the Board, must notify the executor of the estate or the trustee of the trust and sign a full renunciation.

#### **6.72 Accession Procedures**

Each object will be accessioned according to the following professional museum procedures.

- 1) Assign an accession number to the object and record it with other basic data in the Accession Register
- 2) Physically record the accession number on the object;
- 3) Create an object folder, which contains pertinent documentation associated with the object—i.e., a copy of the Deed of Gift, appraisal, acknowledgment letter, correspondence between donor and the IJHS, condition report, photograph, etc.
- 4) Complete a detailed condition report
- 5) Assign and prepare a collection storage location for the object
- 6) Complete a catalogue report for the object in the computerized collections database
- 7) Photograph the object for the catalogue report, the object file, and the accession file.

A copy of updates to the Accession Register will be made at the end of every calendar year and placed in a bank safe deposit box or similar secure off-site location.

**6.8 Appraisals.** No IJHS Board or staff member shall appraise an object or collection for tax or other purposes. The IJHS shall not pay for nor reimburse a donor for such appraisal costs. If an appraisal is requested, every effort will be made to provide the donor with a list of several reputable appraisers in their area without giving preference to any one appraiser. If a donor provides an official appraisal of an object or a collection, that appraisal, along with the properly signed deed of gift, will be filed with the deed of gift, but the IJHS will not include, refer to, or verify the valuation in any paperwork or correspondence related to the gift.

**6.9 Conflict of interest:** The following is adapted from the Statement of Professional Standards and Ethics of the American Association for State and Local History:

*Historical organizations and agencies exist to serve the public interest and must always act in such a way as to maintain public confidence and trust.*

*All Board members, employees and volunteers of the IJHS must be careful to avoid both the appearance and the reality of using their positions or the information and access gained from their positions improperly for their personal benefit or for the benefit of another organization.*

All Board members, employees and volunteers of the IJHS shall refrain from personal collecting of items in competition with the IJHS or in any manner that conflicts with the interests of the IJHS. In the application of this policy, all Board members, employees and volunteers of the IJHS must use their discretion and should consider the rarity and value of the item and the potential interest of the IJHS in the item.

Conflicts of interest under this policy will be addressed in accordance with the IJHS' Conflict of Interest Procedure. If a board member, employee, or volunteer believes a conflict of interest under this policy has arisen or may arise, this person should refer the matter to the Executive Director. The IJHS, on its own initiative, may also consider conflicts and potential conflicts of interest involving Board members, employees and volunteers of the IJHS under this policy. In the event a conflict is found to exist, the IJHS may require that the Board member, employee or volunteer make the item at issue available for acquisition by the IJHS in a manner determined to be appropriate, and under reasonable circumstances determined in accordance with the Conflict of Interest Procedure.

Collections owned or possessed by the IJHS will not be made available to any individual on any basis for personal use, either on or off the premises, or for any other purpose contrary to the Collections Policy.

## 7. DEACCESSIONING/DISPOSAL

From time to time, the IJHS may decide to remove certain items from its Long-Term collection. The deaccessioning of an item must be done with careful deliberation because it means that the IJHS is abrogating its obligation to preserve and care for the item in perpetuity. The motivation for deaccessioning must clearly be to benefit the IJHS as opposed to any other organization or any private party. To aid in the decision, and as a matter of courtesy, staff should make a good faith effort to contact donors (or descendants) of the option to deaccession and dispose of the item; however, items once gifted are the property of the IJHS and will not be returned to original owners.

**7.1 Definition.** To *deaccession* an object is to formally and permanently remove it from the collections. To *dispose* of an object is to relinquish title and remove the object from the premises.

**7.2 Deaccessioning.** Deaccessioning of any object from the IJHS collection is not to be undertaken lightly. Although at times it may be more prudent to deaccession or dispose of items in the collection than to continue caring for them, it should be understood that the IJHS does not support deaccessioning as a means of generating revenue or simply liberating space. A careful, thoughtful, and necessarily slow process is required to determine whether deaccessioning and disposition of an object is the best course of action for the IJHS, the remaining collections, and the public. Objects suggested for deaccession should ordinarily be presented to the Board at the regularly scheduled meeting prior to the meeting at which the Board will vote on the matter.

**7.3 Criteria.** An object will be considered for deaccessioning if it is no longer relevant, appropriate, or useful to the mission of the IJHS and its activities—i.e., if the item is found to be damaged or destroyed beyond its inherent or monetary value, is determined to be unrelated to the IJHS' scope of collecting, has been irreversibly altered beyond educational use, or if it poses a threat to personnel or other collections. An object may also be considered for deaccessioning if it has been missing for a considerable amount of time, or is known to have been stolen and if all efforts to retrieve or locate the object have been unsuccessful.

Title research must be certified by the Executive Director or designee, in order to ensure that the IJHS holds clear title to the object and is therefore free to deaccession it.

Objects that are donated to and accessioned by the IJHS shall not be deaccessioned for a period of two years after accessioning into the collections as there may be tax consequences for the donor.

- 7.31 Authority.** Deaccessioning of an object will be initiated by the Executive Director in conjunction with the Collections Committee. A written recommendation with a rationale for deaccessioning the object, including manner of disposal, shall be forwarded to the Board of Directors for final disposition. The Board of Directors must receive notification of the intention to deaccession an object(s) and the method of disposal in writing. The final vote by the Board must take place at a meeting subsequent to the board meeting where deaccessioning was first proposed. No materials shall be deaccessioned without the approval of the Board. Records of the deaccessioning actions, including final disposition will be placed as a permanent record in the collection files.
- 7.32 Secondary Collections.** Objects in secondary collections may be used and disposed of with the approval of the Collections Committee in consultation with the Executive Director.
- 7.4 Documentation.** All objects must be thoroughly documented, including photographs, measurements, and condition reports before disposition. The Executive Director or designee is responsible for documenting the deaccessioning and disposition procedure and for seeing that *all* records on the object, prior and subsequent to deaccessioning and/or disposal, are retained.
- 7.5 Preferred Methods of Disposal.** When an object has been proposed for deaccessioning, it is important to explore the various possible means of disposal. Due diligence requires that the object be kept in the public domain if at all possible; therefore, the IJHS prefers the following methods of disposal in the following order:
- 7.51 Exchange with other Jewish historical societies, state historical societies, museums, historic houses, or other non-profit educational institutions to strengthen the collections of the IJHS**
- 7.52 Transfer/donation** to another historical society, museum, or educational institution that may make the materials accessible to the public and has a mission similar to that of the IJHS.
- 7.53 Ceremonial burial** in a *genizah* (ritual storage place) or other means of ritual disposal, particularly in the case of certain sacred objects. In these cases, the IJHS Board shall request rabbinic recommendations prior to making a final decision regarding the means of disposal.
- 7.54 Sale.** Public sale at auction is generally not a preferred method of disposal, and a private sale is never preferred. However, in cases where the object has a high value or has required a sizeable financial commitment from the IJHS, transfer to another public institution may not be in the best interest of the remaining collection. In these highly unusual cases, public sale of the deaccessioned object may be the preferred method of disposal. Such cases will be considered carefully and thoroughly by the Collections Committee and the Board of Directors of the IJHS, and the decision whether to sell an object is at the discretion of the Board. In addition, in order to avoid the appearance of deaccessioning being motivated by financial reasons, the public sale of deaccessioned items during a capital campaign is strongly discouraged, and may be delayed, at the discretion of the Board of Directors.
- Staff of the IJHS, the IJHS board members, employees, volunteers, and their immediate families may not acquire deaccessioned objects through any means.
- 7.55 Destruction.** Destruction as a method of disposal is used only in extreme cases in which the object poses a threat to the remaining collections or has deteriorated

beyond usefulness. In such cases, the destruction must be documented fully and witnessed by at least two individuals.

**7.56 Restrictions:** No person involved in the decision to deaccession and/or dispose of IJHS artifacts, whether accessioned or not, may acquire these articles. This includes all employees, members of committees, volunteers in department, or the Board, their spouses, household companions, members of immediate family, and others acting as agents or representatives. Deaccessioned materials may not be returned to the original owners: original owners may purchase items if they come up for public sale.

**7.6 Use of Funds.** Following professional guidelines and standards, funds from the sale of deaccessioned objects shall be restricted and used only for the replenishment or direct care of collections. Funds from the sale of deaccessioned objects may not be used for general operating purposes.

No decision shall be made as to the use of funds from the sale of deaccessioned objects before the deaccessioning is recommended by the Collections Committee.

Funds from the sale of deaccessioned objects from the IJHS Collection may not be used for secondary collections. Funds resulting from the sale of objects from secondary collections are to be treated and managed in the same manner as funds from the sale of deaccessioned objects from the IJHS Collection with the exception that these funds may be used for the care or replenishment of objects in either the IJHS Collection or the secondary collection.

## **8. LOANS**

**8.1 Definition.** The IJHS welcomes public access to its collections by considering requests for loans that are consistent with the long-term conservation and preservation of the collections and with the mission of the IJHS. Loans are the temporary transfer of possession of collection objects and/or materials for a specific purpose and length of time. Loans have no bearing on the ownership of an object but do involve the temporary transfer of responsibility for the care of the object to or from the IJHS.

No collection item may be removed from the site without the express, written approval of the Executive Director.

The IJHS does not accept responsibility for items left “on the doorstep” or at the Jewish Federation of Greater Des Moines without a properly filled-out “Receipt of Incoming Materials.” Such items will be considered unrestricted gifts to the IJHS, not loans, and may be discarded.

**8.2 Purpose.** Loans, both incoming and outgoing, are to be made for exhibition and research purposes only. Exceptions must be approved by the Collections Committee and the IJHS Board of Directors.

**8.3 Out Loans.** The IJHS lends items from its Long-Term Collection and Use Collection to other institutions for the purpose of exhibition or study

**8.31** The collection objects and/or materials may be loaned only to not-for-profit educational institutions, museums, historic houses, etc. as long as the exhibition or research of the loaned objects supports the mission of the IJHS. The IJHS does not lend to private individuals.

**8.32** The decision to lend is based on the condition of the object, suitability for travel, its importance to the preservation and education goals of the IJHS, the ability of the borrowing institution to care for and protect the artifact and/or materials, and potential benefit to the IJHS.

- 8.33** Outgoing loans are approved by the Collections Committee and the IJHS Board of Directors. All outgoing loans are for specific periods, must be documented in a written contract and in the IJHS's written and electronic records, and are monitored by the Executive Director and the Collections Committee.
- 8.34** The institution requesting the loan must furnish evidence that the desired materials will be sufficiently insured while they are absent from the IJHS and that the institution can meet established standards of care while the objects and/or materials are in its care.
- 8.35** All direct costs of borrowing artifacts are borne by the borrower including but not limited to insurance, shipping, photography, etc. The IJHS requires that outgoing loans be photographed prior to leaving the custody of the IJHS.
- 8.35** In some instances, the IJHS may mount an exhibit at an outside venue but retain primary responsibility for the material during the exhibit. These arrangements are not considered loans because there is incomplete transfer of responsibility. A negotiated contract or letter of agreement spells out the responsibilities of the two parties.
- 8.4 Incoming Loans.** The decision to take responsibility for another institution's property or the property of private individuals is one that can potentially expose the IJHS to liability. Therefore, the decision to do so is one that requires serious consideration.
- 8.41** The IJHS will accept loans for purposes of exhibition and study.
- 8.42** All incoming loans must support the mission of the IJHS, be approved by the Collections Committee and the IJHS Board of Directors, and must be for a specific period of time (generally one year or less).
- 8.43** Lender restrictions and the IJHS's ability to properly care for the object are issues that should be considered when requesting an in-loan. The IJHS will handle incoming loan materials in a manner consistent with its handling of similar items in its own collections.
- 8.5 Documentation.** All loans must be documented by a loan agreement signed by the designated representatives from both institutions and all loans must be properly insured. Loan agreements must be reviewed with reasonable frequency to ensure that the objects are properly documented and insured. The site does not make or accept permanent loans.
- 8.6 Objects Placed in the Temporary Custody of the IJHS.** No object will be accepted into custody for loan, identification, study, attribution or use unless it has been receipted using a temporary custody receipt form that clearly defines the respective responsibilities of the owner and the IJHS.
- 8.7 Objects Temporarily Removed from the museum for Conservation Treatment or Repair.** No object will be removed from the museum for conservation or repair unless it has been receipted using a temporary custody receipt form that clearly defines the location of the object while being treated and means of transport to and from the treatment site.
- 8.8 Insurance of loans:** The IJHS will insure incoming loans for the amount requested by the lender but does not endorse the lender's valuation of the material. The IJHS requires insurance for outgoing loans, either under the IJHS' own policy (with the borrower being billed) or under a policy carried by the borrower. The IJHS may require written evidence of coverage. Costs for appraisals of outgoing loans, if required, will be borne by the borrower.

## 9. PRESERVATION AND CARE OF COLLECTIONS

- 9.1 **General.** The preservation and care of collections is central to the IJHS's stewardship and educational missions. In order to further these missions, it is essential that collections be properly exhibited, stored, handled, conserved, and documented.
- 9.2 **Priorities.** In the distribution of scarce conservation or preservation resources, the Long-Term collection shall be given the highest priority over the secondary collection.
- 9.3 **Authority.** The Collections Committee and the Executive Director must review and approve all conservation proposals before objects are treated.

## 10. INVENTORY

- 10.1 **General.** Inventories noting location and condition of objects are to be taken on a regular basis in order that damages and losses might be prevented or resolved in a timely manner. It is imperative to good stewardship that the IJHS maintains awareness about the collections.
- 10.2 **Duties and Responsibilities.** The Executive Director is responsible for ensuring that a regular inventory is implemented. Documented results of the inventory must be maintained at the site.

## 11. RISK MANAGEMENT AND INSURANCE

- 11.1 **General.** The IJHS collections are naturally exposed to risk through exhibition, loans, storage, or handling. Through a prudent collections management program, including risk management, these threats may be reduced or avoided.
- 11.2 **Insuring Collections.** The Executive Director shall work with the Collections Committee to ensure that the IJHS collection objects are adequately insured. Any deviation from current insurance procedures must be approved by the IJHS Board of Directors. An item by item evaluation of accessioned objects shall be conducted every seven years.
- 11.3 **Risk Management.** The Executive Director is responsible for identifying and rectifying potential risks to the collection, including natural disasters, theft, vandalism, deterioration, and improper environments, as well as potential risks to staff or visitors from the collections, such as lead or arsenic contamination. Wherever possible, risks must be reduced or eliminated.
- 11.4 **Disaster.** The IJHS must have a disaster preparedness and recovery plan.

## 12. ADDITIONAL CONSIDERATIONS

### 12.1 **Photography (or other visual recording):**

- 12.1 The IJHS visitors may photograph exhibited artifacts for personal use only, unless restricted for a particular exhibit.
- 12.2 News media may take images for reporting or publicity purposes; otherwise, no professional images of the IJHS collections or exhibits may be created, published, or reproduced without written permission from the IJHS. A fee may be charged. The IJHS may require submittal of proof and caption information, in order to insure accuracy and quality. In the case of borrowed property, permission of the image/artifact's owner must be obtained for professional use.
- 12.3 Photographs of collection objects taken by staff for documentation or exhibition purposes are the property of the IJHS and may not be used commercially except under the guidelines above.

- 12.2 Copyright:** The IJHS holds full copyright for materials it creates (e.g. oral and video histories, publications, and other printed and published material). Where full copyright ownership by the IJHS cannot be claimed, the IJHS will comply with current regulations when reproducing the material and providing access to it.
- 12.3 Access to collections:** The IJHS provides access to collections and relevant records, upon request, to approved researchers. Access is subject to prior arrangement, and requires the presence and assistance of a member of the staff. Records may be screened in order to protect the IJHS, the donor, or source of the artifact or information about it. As a matter of policy, the IJHS will not discuss valuation or purchase price, or other financial matters related to items in its collections.
- 12.4 Insurance and appraisals:**
- 12.41** The collections may not be used for collateral. The IJHS will maintain blanket insurance coverage for its collections at an aggregate value at least as high as the valuations at the time of accession. The staff, Collections Committee, and the Board will review insurance issues annually.
- 12.42** Due to potential conflicts of interest, the IJHS staff will not give monetary appraisals of any sort to donors or other outside parties. Staff opinions on identity, date, or other attributes are personal opinion only, and may not be used for monetary benefit of the owner. The IJHS employees may not engage in buying or selling artifacts that might be construed as related to the IJHS's collecting interests.

**13. IMPLEMENTATION**

***Adopted by  
The Board of the IJHS***

***October 16, 2012***

Melanie Sandler  
President

October 16, 2013  
date