



## **The Chevy Chase Historical Society Collections Policy**

Adopted by the CCHS Board of Directors on February 25, 2014.

### **I. Introduction**

The Chevy Chase Historical Society (“CCHS”) was founded in 1981 as a nonprofit corporation. The CCHS Board of Directors (the “Board”) has overall responsibility for the collections of CCHS and the Director (the “Director”) of the CCHS Archive and Research Center (the “Center”) is responsible for the prudent management of the collections. Prudent management dictates the need for written policies and guidelines. This document is intended to fulfill that need.

### **II. Mission Statement**

CCHS’s mission is to collect, record, interpret and share materials relating to the history of Chevy Chase, Maryland, one of America’s first streetcar suburbs. The organization provides resources for historical research and sponsors a variety of programs and activities to foster knowledge and appreciation of the community’s history.

### **III. Authority**

The Board will approve this Collections Policy and appoint a Collections Committee that will be responsible for implementing this Policy. The Collections Committee will oversee the collections generally, will advise and consult with the Director as either he/she or the Committee deems advisable, will fulfill the functions assigned to it in this Policy and will refer to the Board such matters as may be appropriate for Board review or approval.

#### **IV. Ethics**

The Board, the Director, and any staff or volunteers at the Center will ensure the following:

- A. That priority will be given to the care and management of CCHS historical resources and that actions will be taken to preserve their physical and intellectual integrity.
- B. That items in the collections will not be deaccessioned or disposed of in order to provide financial support for any reason other than preservation or acquisition of collections.
- C. That all efforts will be taken to avoid the appearance and the reality of using their positions or the information and access gained from their positions for personal gain or for the benefit of another organization.
- D. That they will refrain from personal collecting in any manner that conflicts with the interests or credibility of the institution and its policies.
- E. That the collections will not be made available, either inside or outside of the Center, to any individual for personal use or for any purpose that is contrary to this Collections Policy or the best interests of CCHS.
- F. As a member of the American Alliance of Museums (AAM) and the American Association for State and Local History (AASLH), CCHS adheres to the guidelines and standards of these organizations. Copies of the AAM and AASLH Codes of Ethics will be kept on file at the Center.

#### **V. Scope of Collections**

CCHS collects, houses, and maintains books, manuscripts, maps, photographs, artifacts, media, prints, paintings and other materials that relate to one or more of the following:

- A. The land originally purchased and developed by the Chevy Chase Land Company, meaning Sections 1 and 2 (Chevy Chase Village), Section 3, Section 4 (Town of Chevy Chase), Section 5 and other areas within the following geographical boundaries: North - Jones Bridge Road; South - Western Avenue; East - Brookville Road; West - Wisconsin Ave. from Western Ave. to Bradley Lane, West Ave/46th St/47th Street from Bradley Lane to the Railroad Line, along the Railroad Line to East/West Highway, along East/West Highway to the west side of Columbia County Club, north along the west side of Columbia Country Club to Jones Bridge Road to Jones Mill Road.

B. The portion of the neighborhood known as Chevy Chase, D.C. along Connecticut Avenue between Western Avenue and Livingston Street, as it was the commercial and social heart of Chevy Chase, MD and DC.

C. The land known as Martin's Additions, as it was temporarily part of Chevy Chase Village between 1911 and 1916.

D. The social, cultural, economic and political history of the above areas either before or after such areas were developed by the Chevy Chase Land Company.

E. Items of interest relevant to the above areas either before or after such areas were developed by the Chevy Chase Land Company.

## **VI. Acquisitions**

A. Designated Collections. Acquisitions for the collections of CCHS are made in the interest of promoting CCHS's mission to collect, record, interpret and share the history of Chevy Chase. Items collected by CCHS will be maintained in either the Archive Collection or the Research Files as follows:

1. Archive Collection. This collection consists of books, manuscripts, maps, photographs, artifacts, media, prints, paintings and other materials that meet the criteria in Section V. These items are accessioned into the CCHS collection and are given an accession number (see Section VIII). These objects must also be deaccessioned before they can be removed from the collection (see Section IX). Donors sign a Deed of Gift relinquishing all rights to the object and receive a letter of thanks. The original Deed of Gift and a copy of the thank you letter are maintained in the Acquisition File, kept in the CCHS Administrative Files.

2. Research Files. While all objects in the CCHS collections are for research purposes, items placed in the Research Files are not subject to the same criteria as those in the Archive Collection. These items are not accessioned into the Archive Collection and do not receive accession numbers. These items are kept in the Center's Research Files and are subject to periodic cleaning and weeding out as the Director sees fit. Items placed in the Research Files might include newspaper clippings, student papers or theses, pamphlets, brochures, and duplicates of items in excess of the two copies maintained in the Archive Collection (see Section VI.C). In addition, research notes for CCHS exhibits and other items of general interest to the Chevy Chase area are included in the Research Files.

B. Acquisition Criteria. Because of limited storage space and conservation funds, the Collections Committee or the Director will use its or his/her discretion when accepting donated items. In considering whether to accept a donation, the Collections Committee or the Director will be guided by the following criteria:

1. Relevance of the item to the criteria in Section V, Scope of Collections,

2. Uniqueness of the item to the collection,
3. Uniqueness of the item in general,
4. Condition of the item,
5. Conservation and preservation requirements of the item, and
6. Size of the item.

C. Duplicate Copies. The Society maintains only two copies of one item in the Archive Collection. Duplicates in excess of two copies will be placed in the Research Files for general use and will be subject to the Research Files maintenance procedures in Section VI.A.2 above. Multiple copies of maps will be kept in the map file, as space allows, at the discretion of the Director.

## **VII. Acquisition Methods**

A. Types of Acquisitions. In general, items are added to the Archive Collection in the following ways:

1. Donation – Items given to CCHS by individuals or organizations
2. Bequest – Items given to CCHS at the direction of a deceased individual
3. Purchase – Items bought by CCHS or by someone acting on behalf of CCHS
4. Field Collection – Items found in the field and given to CCHS

B. Restricted Gifts and Bequests. As a matter of policy, CCHS will not accept restricted gifts or bequests. Restrictions, however harmless they may seem at the time, can hamper educational and interpretive work and can cause legal problems should the restriction no longer be viable. In the case of a restricted gift or bequest which would, despite the restrictions, be of great value to CCHS's collections, the Collections Committee will make a recommendation to the Board, which will make the final decision on its acceptance. In cases where the Board decides to accept a restricted gift, an amendment to the Deed of Gift will be prepared by the Director and signed by the donor specifying the scope and duration of the restrictions and the conditions under which the restrictions will be lifted.

C. Acquisition by Purchase. All acquisitions by purchase are to be consistent with the budget approved by the Board for this purpose. If advisable, the Collections Committee and/or the Director will research the title and provenance of the item and arrange for outside appraisals of objects. In all cases, a bill of sale will be obtained and placed in the Acquisition File along with all documentation regarding the item, including provenance research and recommendations to the Board of Directors.

D. Documentation. All documentation, including correspondence, Deeds of Gift, receipts, forms and other documentation regarding acquisitions of any sort will be kept in perpetuity in the Acquisition File. These records must be maintained even if the item is no longer part of any CCHS collection. All requests by the public to view documentation are to be handled by the Director. Donor contact information (e.g., address, phone, fax, email) will not be made public without express permission of the donor.

1. Title and Provenance. Reasonable efforts will be made by CCHS to ensure that items accepted into the collections have clear title. It is the responsibility of the Director, with the help of the Collections Committee, to investigate all issues of questionable title. If there is any doubt about an item's provenance or title, CCHS will follow the policies and procedures recommended by the AAM and the AASLH, copies of which will be kept on file at the Center.

2. Transfer of Rights. The Deed of Gift to be signed by all donors will provide that all associated rights to the item belonging to the donor are being transferred to CCHS. Associated rights include those of reproduction, adaptation, distribution, performance, and display. If the donor does not have all of these rights to transfer, an amendment to the Deed of Gift will be prepared by the Director and signed by the donor explaining the status of the associated rights to the item. The Director will consult with the Collections Committee, and if appropriate the Board, concerning any such amendments.

E. Abandoned Property. "Abandoned Property" is defined as those items left on the CCHS premises that have no documentation, correspondence or other evidence of the owner's identity or intentions. Items constituting abandoned property cannot be accessioned until it is established that CCHS is the owner of such items. While the question of ownership is being investigated, the items will be kept in a holding collection, which may or may not be located in the Center. The Director, in consultation with the Collections Committee and the Board as appropriate, will conduct the investigation to establish ownership. In the absence of applicable law in the state of Maryland governing such investigation, the Director will be guided by the policies of the AAM, the AASLH and the Society of American Archivists.

F. Found in Collection. Items "Found in Collection" are items that are in the Archive Collection but have no accompanying documentation and can be neither proved nor disproved to belong to CCHS. Items found in the collection can be assumed to belong to the CCHS, and will be accessioned accordingly. Should a claimant come forward, he/she will bear the burden of proving that the item belongs to him/her and not to CCHS. If an object found in the collection is proposed to be deaccessioned under Section IX, before approving the deaccession the Board will consider whether, if a claimant comes forward in the future and successfully proves ownership of the deaccessioned item, CCHS might be required make reparations to the owner.

G. Appraisals and Taxes. Gifts in kind are eligible for tax deductions by the donor to the extent allowed under state and federal law. Under no circumstances will any CCHS Board member, staff member or volunteer give an appraisal of an item. CCHS will not pay for an outside appraisal on behalf of the donor.

H. Duplicate Gifts or Bequests. When a gift or bequest offered to CCHS constitutes a duplicate of an item already contained in the collections, the Director, in consultation with the Collection Committee or the Board if appropriate, may (i) decline to accept the gift or bequest when it is offered, (ii) return the gift or bequest to the donor or the estate if it has already been accepted, or (iii) accept the gift or bequest for inclusion in the Research Files.

## **VIII. Accession Procedures**

A. Donations. Items for donation may be brought directly to the Director. The items will then be processed as follows:

1. Suitability of Items. Using the acquisition criteria in Sections V and VI.B, the Director will make a cursory survey of each item donated to determine whether it is suitable for the collection. If an item is deemed unsuitable, the Director will immediately return it to the donor with an explanation. The Director may offer an informal suggestion as to institutions where the gift might be more suitable. If the donor would prefer CCHS to dispose of the unsuitable item, the Director will prepare a Deed of Gift expressly noting that fact and have donor sign the notation.

2. Temporary Custody.

a) Gifts. If the Director is unsure whether the gift is suitable, he/she will take the gift into temporary custody, and inform the donor that it may ultimately be returned. In this case, a Temporary Custody Form must be completed and signed by both the donor and the Director. Temporary Custody will be limited to three months, unless the Temporary Custody Form is renewed and signed by the donor and the Director. The Director, in consultation with the Collections Committee, will determine whether the item is in fact suitable for the collection. The Director will communicate this decision to the donor. If the item is acceptable, the Director will obtain a completed Deed of Gift for the item. If it is not, the Director will either return the item to the donor or notify the donor that the item must be retrieved within a specified period of time not to exceed two months.

b) Temporary Use. Items left with the Director for copying, scanning, study, analysis or other temporary use are also deemed to be held in temporary custody. A Temporary Custody Form must be completed and signed by the Director and the person leaving the items. Promptly after the Director is finished with such items, the Director will return them or make arrangements for them to be retrieved by the person who left them.

3. Restrictions. If the donor is placing restrictions on the gift, the Director will consult with the Collections Committee and follow the procedures in Section VII.B.

4. Deed of Gift. Items that are suitable for donation will be listed on a Deed of Gift. The Deed of Gift will be signed by both the DONOR and the Director or other authorized representative of CCHS. **NO DONATIONS MAY BE ACCEPTED WITHOUT A SIGNATURE OF THE DONOR ON A DEED OF GIFT OR A TEMPORARY CUSTODY FORM.**

5. Accessioning. The items listed on the Deed of Gift will be accessioned by the Director or CCHS staff.

a) Donations. An overall accession number will be assigned to the entire donation listed on the Deed of Gift, with additional item numbers added for each individual item. The Director will write a thank you letter to the donor. The Deed of Gift, a copy of the thank you letter, and any other documentation concerning the item, the donation or the donor will be placed in the Acquisition File, organized by accession number. All such documentation will be marked with the associated accession number.

b) Bequests. When notice of a bequest is received, it will be referred to the Collections Committee, which, in consultation with the Director and, if appropriate, with the Board, will determine whether the gift is suitable for the collection as described in Sections V and VI.B above. When the item is delivered, it will be accessioned like other donations as described in Section VIII.A.5.a above. Any documentation relating to the bequest will take the place of a Deed of Gift. The Director will write a letter of receipt to the estate rather than the usual thank you letter, and a copy of this letter will also be placed in the Acquisition File.

c) Found in Collection. Items found in the collection as described in Section VII.F will be accessioned as described in Section VIII.A.5.a always noting the item as "Found in Collection." Any original numbers found on the item will be kept. If there is no existing number associated with the item, one will be created according to the accession number sequence.

- d) Acquisition by Purchase. The procedure for accessioning objects acquired by purchase will be the same as for accessioning donations under Section VIII.A.5.a, with the exceptions that the bill of sale will substitute for a Deed of Gift and no thank you letter will be written.

## **IX. Deaccession Procedures**

From time to time it may be deemed necessary to remove items from the collection, which may be done only through the following deaccession procedures. All deaccessioning must be done thoughtfully and carefully, governed by the same basic principles as those for accessions. Such caution is necessary because the practice of deaccessioning has been a source of controversy for museums and archives in the past. CCHS must consider the possibility that the process, if done improperly, may erode the notion of permanence, may give the appearance of bad faith between previous donors and CCHS, and may generate unfavorable publicity in the community at large. CCHS follows the deaccession guidelines of the AAM and the AASLH, copies of which are kept on file at the Center.

A. Board Approval. If the Director, in consultation with the Collections Committee, proposes to deaccession any item from the collections, he/she will make a recommendation to that effect to the Board. The Board will review each recommendation to ensure that deaccessioning is justified and that CCHS holds legal title to the item. Before deaccessioning any item, the Board also must consider any legal restrictions and the donor's intent. Board approval is required for all deaccessions.

B. Deaccession Criteria. In determining whether to deaccession an item from the collection, the Board will consider the following criteria:

1. Whether the item is damaged or incomplete. Normally, deaccessioning of such an item will occur only upon obtaining a complete copy of the item or one in better condition.
2. Whether the item is no longer within the scope of the collections as set forth in Section V.
3. Whether the item can be housed or conserved properly under CCHS's storage conditions or budget.
4. Whether one or more duplicates of the item are contained in the collections.
5. Other criteria that the Board deems relevant in the circumstances.

C. Deaccession Methods. In addition to determining whether to deaccession an item, the Board will also determine the method of deaccessioning from among the following:

1. Donation to another library, archive, museum or educational institution.

2. Trade or exchange with another library, archive, museum or educational institution.
3. Sale at public auction or other publicly advertised open sale.
4. Transfer to the CCHS Research Files.
5. Destruction, which must take place in front of at least one non-board witness, with documentation signed to this effect.
6. Other professionally acceptable deaccession methods.

D. Deaccession Procedures.

1. Donations. If the item to be deaccessioned was acquired by donation, the Board will determine whether, as a courtesy, it is advisable to notify the donor of the proposed deaccession due to a longstanding relationship with the donor, frequent visits by the donor or family to see the item, or other reasons. The Director will make and document such notification.
2. Deaccession File. The Director shall maintain a list of all deaccessioned items in a designated Deaccession File.
3. Public Offer. No board member, staff member or volunteer may purchase or take deaccessioned items unless they are offered publicly and with complete disclosure of their origins.
4. Use of Proceeds. Any proceeds from deaccessions will be used for the purchase of additional books, maps, manuscripts, photographs, prints, artifacts or other items for the collections or for collection maintenance and preservation.

**X. Loans**

CCHS rarely lends items from its collections or accepts loaned items from other institutions or individuals. Any such incoming or outgoing loans must be approved by the Board. An Incoming Loan Form or Outgoing Loan Form, as appropriate, will be completed for each item borrowed from, or lent to, an individual or another institution. This form will set forth the conditions of the loan, the reasons for the loan, the duration of the loan, limits on use of the loaned item, conservation restrictions, packing and travel provisions, financial arrangements, credit line requirements, and insurance requirements. This form will be completed and signed by the Director and the individual lender/borrower or authorized officials of the lending/borrowing institution.

## **XI. Collections Care and Maintenance**

The Director is responsible for the care and maintenance of the collections. In discharging this responsibility, the Director will:

- A. Monitor storage and research conditions and make such adjustments as may be necessary, reasonably practicable, and consistent with CCHS' resources and the location of the Center.
- B. Do minor preservation where necessary, consistent with preventative care appropriate for the collection materials.
- C. Recommend to the Board for its approval the retaining of such professional conservation services as may be advisable from time to time.
- D. Undertake a complete inventory of the collections every ten years.
- E. Maintain and enhance the computerized collections database, supervise any volunteers working on the database, and monitor public usage of the database through the CCHS website.

## **XII. Risk Management**

CCHS takes a balanced approach to risk management that includes both insurance and preventative practices. In addition to insuring the collection, CCHS carries general liability insurance to protect staff and patrons.

- A. Environment
  - 1. The Director will regularly monitor environmental conditions and take all reasonably practicable measures to mitigate the effects on the collections of ultraviolet light, fluctuations in temperature and humidity, air pollution, damage, pests and natural disasters.
  - 2. Food and beverages are not allowed in the Center.
  - 3. The Director will give instructions to anyone who handles any items in the collections as to the proper handling of such items, including the use of gloves. Anyone who fails to comply with such instructions will not be allowed to handle such items.
  - 4. An emergency preparedness plan will be created in consultation with the Chevy Chase Library staff and key CCHS staff will be trained in implementation of the plan.

B. Security. Reasonable efforts will be made to ensure the safety and security of CCHS staff and visitors, as well as the CCHS collections and facilities at the Chevy Chase Library. The Library has an alarm system that detects both intruders and fire or other environmental hazards. Access to CCHS' electronic equipment and data is password protected.

### **XIII. Review of Policy**

Every three years the Collections Committee will review this Collections Policy and recommend to the Board any amendments to the policy it deems advisable. All amendments to the policy must be approved by the Board.