



COLLECTIONS MANAGEMENT POLICY

EL DORADO COUNTY HISTORICAL MUSEUM

Second Revision adopted by the Historical Museum Commission,
November 2020

Originally adopted by the Historical Museum Commission, October
1999

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<http://museum.edcgov.us>
(530) 621-5865

APPROVAL AUTHORITY AND APPROVAL

The El Dorado County Historical Museum is a division in the Library Department with one full time employee, the Museum Administrator, and volunteers who carry out many of the day-to-day functions of the Museum. The Historical Museum Commission is appointed by the Board of Supervisors to provide oversight, as stated in Ordinance #4551.

This Collections Management Policy is approved by the Historical Museum Commission on November 6m 2020 and recommends that it be adopted by the El Dorado County Historical Museum, and the County of El Dorado Board of Supervisors, and implemented by the Museum Administrator. This Collections Management Policy should be reviewed and updated by staff and the Commission on a regular basis, recommending every five years, as suggested by the museum profession's best practices.

1) Purpose of the Museum Collections Management Policy

- a) The purpose of this Policy is to provide guidance to staff and volunteers in carrying out their legal and ethical responsibility to the collections in their care, according to professional museum standards and best practices.i
- b) The Museum Administrator is responsible for implementing this policy; training and supervising appropriate volunteers carrying out the related tasks; and keeping the Historical Museum Commission informed of collections related issues.
- c) The Collections Management Policy is one of the Five Core Documents for Museums, identified as fundamental for professional museum operations, and which embody core museum values and practices.ii Additional County Museum documents which include guidance on collections care include the County Museum Emergency Response Plan with specific instructions on protecting and salvaging collections in the event of an emergency; County Museum Ethics Policy with definitions of possible conflict of interests regarding personal
- d) collecting by staff, accepting gifts, donor requests and conditions, disclosure statements for staff, commissioners and volunteers; and County Museum Procedures with detailed procedural steps for volunteers to follow on collections acquisition, disposition, access and care
- e) Use of the terms "object" "artifact" "collections" "ephemera" "documents" are used throughout this document, and refers to items with some level of historical association in the Museum's care.
- f) The Museum should strive to provide the best care possible to all collections within its domain.

2) Mission of the El Dorado County Historical Museum

- a) is to exhibit and interpret the heritage of the county in a current, accurate, and engaging manner
- b) is to be a valuable historical resource to the community through its well organized research facility, historical exhibits, and educational programs
- c) is to collect, document, and preserve artifacts and records significant to the history of El Dorado County using the highest standards of scholarship and professional museum and archival practices
- d) is to provide a rewarding experience for volunteers and enhance the museum's significance to the community

e) Main areas of Museum Programming

- i) Presentation of historical artifacts and topics in the form of displays, exhibits, guided tours, outreach presentations, videos, social media and website.
- ii) Provide research services using historical and archival collections and make historical resources available to county staff, cultural resource specialists, and the public.

- iii) Operate the El Dorado Western Railroad, a vintage railroad providing historical experiences for the public and volunteers, as a way preserve and present county railroad history; develop a County Railroad History Center and supporting facilities.

3) Collecting Objectives

- a) Scope of Collections - The Museum acquires, maintains, preserves, and displays objects, documents, and ephemera which are significant to the people, history, and culture of El Dorado County. These items include but are not limited to natural, hand-made or manufactured objects; decorative and fine arts; equipment and tools; personal effects; items produced by business, government, and private enterprises; transportation; communication; and other items that are the result of human activity. Objects, documents and ephemera outside the scope of these collecting objectives will be disposed of according to approved procedures.
- b) History of the Collections -
 - i) The County Museum building was constructed in 1973 by the County with funds granted by the State Parks Commission. The first Historical Museum Commission was appointed by the Board of Supervisors in 1973. Volunteers were recruited from the El Dorado County Historical Society membership and board. The County Museum officially opened to the public during the 1974 County Fair. Museum operations and collections care was done solely by volunteers until 1991 when the County hired the first paid director. The Museum's first Mission Statement and the first Collections Management Policy was adopted by the Historical Museum Commission in 2000.
 - ii) Historical collections held by the El Dorado County Chamber of Commerce and the El Dorado County Historical Society were physically transferred to the new Museum in 1973 and quick claim deed transfer documents completed in 1975.
 - iii) All historical collections held by the El Dorado County Historical Society were transferred by unanimous vote of the Society Board of Directors in 2003 and accepted by the Historical Museum Commission.
 - iv) Facilities for Collections
 - v) 104 Placerville Drive - the site includes the main building with the Exhibit Hall, the Research Room, artifact and document storage areas; the Museum Yard outside exhibits, artifact storage, and the Engine House and Machine Shop.
 - vi) 345 Fair Lane - off-site storage for government archives, historical documents, media collections, and business records.
 - vii) 4650 Oriental St - known as the El Dorado Station on property designated for the Railroad
 - viii) History Center, it holds railroad related objects and serves as the operations center for the El Dorado Western Railroad.

4) Definition of Collections Categories and Uses

The collections held by the Museum are divided into the following four categories, acquired for different purposes with different care and documentation requirements:

a) **Permanent collections:**

These objects, comparatively old in nature (depending on the kind of artifact) are accessioned, located on exhibit or in storage, and given the highest possible level of care.

- i) objects for exhibit: objects are collected to be used in permanent and temporary exhibits relating to the history of El Dorado County at the Museum, and occasionally at other county locations.
- ii) objects for research: objects are collected to be used for research, which can include but are not limited to, archaeological collections, comparison or type collections such as a mineral collection, and books for the research library.
- iii) outgoing loans: such as to the Fountain Tallman Museum, Library exhibits, County offices, other museums, and outdoor locations; outgoing loans are made for the purpose of exhibition, study, or for reproduction; loans should only be made to other institutions.

b) **Objects belonging to others:**

The Museum does not hold title to these objects. Temporary Receipt Forms, Loan Forms, or other written documentation should identify the owner while in the Museum's custody.

- c) Incoming loans are acquired from individuals and institutions for the purpose of exhibition, or to be used as a part of the research collection. All loans should be made for a specified period of time not to exceed two years which can be renewed. All loans should be cared for in the same manner as collections owned by the museum.
- d) Objects awaiting consideration are sometimes left at the Museum by the owner to be considered for donation by the Museum Commission at their next regular meeting. They should be approved by the Museum Administrator for this purpose and a Temporary Receipt Form completed. If the object is not approved for acquisition, it will be returned. If, after six months the Museum has not been successful in returning the object, it will be considered abandoned.
- e) Objects stored temporarily require the Museum Administrator's approval and a Temporary Receipt Form completed documenting the purpose for the temporary storage. This should only be done if there is a benefit to the Museum, as owners may be looking for a way to add value to their object.
- f) Personal property of staff and volunteers should be inventoried regularly and the list made available to the Museum Administrator. Staff and volunteers should understand they are leaving their personal property with the Museum at their own risk. The Museum should not take

responsibility for insuring these items or be required to have additional protective measures for these items.

g) Archival and Research collections

These collections are made up of historical items and current information about people, places, and events in the county.

- i) **Archival collection** consist of historical photographs, maps, letters, diaries, books, ledgers, organizational histories, oral histories, government documents, and public records related to people and places within the county
- ii) **Research collection** includes genealogical documents such as announcements of obituaries, births, and marriages, records of burials, and family histories; secondary resources includes reports compiled by geographical location, significant people and events, newspapers, and abstracts; scanned and/or photocopied copies of historical photographs and maps and are made accessible to the public.
- iii) **General files** have been compiled related to topics, locations, and people significant to the history of the county.
- iv) **Reference materials** includes books and other publications, cultural resource reports, exhibit research, an in-house genealogy database, local historians research materials, and transcriptions of original archival material.

h) Property (known as "props")

These objects are not accessioned and so may be handled, utilized, replaced, and disposed of as necessary, and tracked with a separate and simpler inventory system.

- i) Objects awaiting disposition have been deaccessioned and will be disposed of according to the recommendations of the Museum Commission.
- ii) Objects received for consideration for the permanent collection and determined to be unsuitable for the permanent collection.
- iii) Objects found in the collection and determined to be unsuitable for the permanent collection.
- iv) Objects left at the museum without the consent of the Museum Administrator or a Museum Commissioner and determined to be unsuitable for the permanent collection.
- v) Objects used in educational programs to be handled by visitors as part of their learning experience.
- vi) Objects donated for fundraising purposes to the museum to be sold for the support of the museum.
- vii) Equipment, such as computers, ladders, hand and power tools, intended to be used for Museum administration, program operations, restoration and repair projects, and other museum uses.

- viii) Consumables, such as office supplies, refreshments, fuel, machinery parts, and other items donated to support the Museum programs and railroad operations.

5) Collections Management by Collections Categories

a) A. Permanent Collection

- i) Acquisition is the process of discovery, preliminary evaluation, negotiation for, taking custody of, documenting title to, and acknowledging receipt of documents and objects.
 - (1) Permanent Collections may only be accepted on the approval of a majority of the Museum Commission, and the concurrence of the Museum Administrator.
 - (2) Collecting goals reflect the Museum's mission to acquire the best and most representative objects related to the interpretation of the County's history and preservation of its significant historical artifacts.
 - (3) Acquisition procedures for the Permanent Collection is called accessioning. A rigorous evaluation must occur before the object is added to the permanent collection. Accessioning represents a commitment to preserve, interpret, and document that object throughout the Museum's foreseeable future. The following steps should be completed before an object is accessioned into the permanent collection:
 - (4) the present owner must have clear title to the object and give up ownership voluntarily
 - (5) if the object is to be purchased, funding must be arranged and approved in advance
 - (6) the Museum must be able to care for the object in a manner that complies with minimum professional museum standards.
 - (7) the object must meet the Museum's collecting objectives
 - (8) the object's provenance or history must be documented, if possible all moral, legal, and ethical implications of acquiring the object must be resolved
 - (9) any restrictions imposed upon the acquisition of the object must be approved by the Museum Commission
 - (10) If objects already in the collection have no documented history or known donor, the
 - (11) object can be accessioned using as many of the above steps as possible.
 - (12) Monetary value should be determined by the donor or an appraiser on behalf of the donor, as this is information for the donor. It is the policy of the Museum to not provide monetary appraisals.
- ii) Disposition of objects that have been collected according to the above procedures should be evaluated in an equally careful manner and taking

into consideration, if known, the donor's original intentions. If an object from the permanent collection is determined to be unsuitable or no longer meets the interpretation and preservation goals of the museum, and the Museum holds title to the object, then it can be deaccessioned. The Museum Commission and the Museum Administrator determines if objects may be deaccessioned, and requires the following considerations and procedures:

- (1) An object in the permanent collection may be deemed unsuitable for the Museum because it does not conform to the Museum's collecting goals; has been found to be not what it was thought to be; or requires too many resources to maintain.
 - (2) The Museum has clear and unrestricted title. If supporting documentation does not exist,
 - (3) a good effort must be made and documented to establish the Museum's ownership.
 - (4) Donors may be contacted as a "good will" measure.
 - (5) Complete records of the deaccessioning process must be maintained. Included should be Museum Commission meeting minutes discussing the object, why it is to be
 - (6) deaccessioned, if there is any dissension among commissioners, and the disposal method.
 - (7) Disposal methods must be considered appropriate to the object. Approved methods of disposal are (in order of preference):
 - (8) Donation or exchange with another museum
 - (9) Use in other Museum collections, such as for educational programs or for office use.
 - (10) Public sale or auction according to County surplus ordinance requirements, with funds to benefit the Museum's collection
 - (11) Scrapped or dumped, if in poor condition and of little value
 - (12) All income derived from the sale of deaccessioned objects is restricted to the acquisition of permanent collections or the care and conservation of permanent collections already owned by the Museum.
- iii) Care of objects in the permanent collection should be prioritized as to the level of protection, given the reality of limited staff (paid and unpaid), money, and space.
- (1) The Museum has made the greatest commitment to objects in the permanent collection. The rigorous evaluation which is part of the accessioning process requires that these objects be cared for in perpetuity, unless they are deaccessioned from the permanent collection. Proper care should include a stable environment with temperature and light control, restricted access while on exhibit and in storage, proper documentation, and careful handling by trained staff (paid and unpaid).

- (2) Conservation of objects in the permanent collection, including preventive conservation measures should be considered by the Museum Commission and the Museum Administrator. Objects of high value to the Museum's interpretation and exhibit plan, or objects of high intrinsic value should be considered first for conservation. All conservation work requiring invasive work on the object will only be done by professional conservators or trained experts in the appropriate field.
- (3) Special requests to care for cultural artifacts in a traditional manner should be considered, and if there is no long term damage, allowed and carried out by trained members of the cultural group under Museum supervision
- (4) The Museum's Emergency Response Plan takes into consideration the protection, care, and, if necessary, the salvage of objects in the permanent collection.
- iv) Required Documentation -A fully executed Loan Form, with identifying descriptions, available provenance information, valuation (determined by owner,) insurance carrier (if any), location in Museum, lender contact information, length of loan, special restrictions (if any), and all correspondence related to the object.

b) Archival and Research Collection

- i) Acquisitions should consist of items related to the history of El Dorado County; this includes but is not limited to: records, maps, photographs, letters and diaries, historical books, media, documents, ledgers, reference materials, cultural resource reports, family histories, newspapers, and indexes.
 - (1) Archival and research collections may only be accepted by the Museum Administrator
 - (2) Archival and research collections requiring substantial space, restrictions by the donor, or other considerations should be approved by the Museum Commission.
 - (3) Archival and research collections are acquired as:
 - (a) Transfers from other county departments
 - (b) Donations from individuals, other museums and libraries, agencies, corporations and businesses
 - (c) Created in-house by volunteers or researchers which focus on a particular topic, individual, or family
 - (d) Retrieved from outside auctions or sales, dumpsters, and other places where significant county archival and research materials have been unwittingly disposed
 - (e) Copied from original items brought to the Museum by researchers (such as photos or letters), other county departments (such as maps), volunteers, and the public

- (4) Archival and research collections acquired as part of a particular research topic from an individual should be kept together as a Special Collection.
- (5) Archival and research collections are incorporated into the existing filing system, cross referenced and accessible through finding aids.

ii) Disposition

- (1) Archival and research objects outside the scope of the collection, but with historic or monetary value, such as historic books, ledgers, diaries, letters, and old photographs should follow procedures as outlined in the section on the disposition of permanent collection outlined above.
- (2) Duplicates should be reviewed by the Museum Administrator and kept if considered rare.
- (3) Modern books, papers, microfilm, modern photographs and negatives, cards, files, and other research-related collections outside the scope of the collection should be disposed of through transfer, discard, or sale.
- (4) Care - Historical archival and research items should be treated as part of the permanent collection and as such, should be given a high level of care. Research collections consisting of papers, newspaper clippings, modern photographs, indexes, etc. should be kept in a manner that assures their continued survival. Access to these collections should be supervised.
- (5) Required Documentation - Objects of historic value such as original ledgers, books, letters, historic photographs, and other "old" items should have the same documentation as an object in the permanent collection. Items collected for the image or information such as modern copies of old photographs, microfilm, photocopies, and newspaper clippings should be filed according to the appropriate alpha-numeric system. Images (modern photographs or scanned photographs) should use the current numbering system, and the photograph's original owner noted in the index. Permission to share and reproduce photographs is implied, unless otherwise stated by the owner.

c) Property (used for hands-on programming, railroad operation and maintenance, educational use, office use, to be sold, or is abandoned)

i) Acquisition

- (1) May be accepted for use as "property" by the Museum Administrator or a Museum Commissioner most involved in that particular project.
- (2) Items collected as "property" should NOT be considered unique, historically significant or valuable.
- (3) Property collections are:

- (a) Objects abandoned at the Museum with no known donor or history, and can be incorporated into any of the collections using the appropriate acquisition procedures or disposed of according to prescribed county procedures.
 - (b) Objects acquired for educational use should meet the Museum's educational and exhibit goals. These objects should be safe to handle and replaceable if broken or damaged by their use in these programs.
 - (c) Objects to be sold to benefit the Museum should not be significant to the history of the county, unless the object is one of many such objects already in the collection.
 - (d) Objects acquired for office use should be considered necessary and in good working order, and not require any undue expense.
 - (e) Objects acquired for repair or restoration work should be in good working order, and not require any undue expense.
 - (f) Objects acquired for the El Dorado Western Railroad program include rolling stock, equipment and railroad-themed exhibit objects used by the El Dorado Western Railroad; in general the El Dorado Western Railway Foundation owns most Railroad program equipment as stated in the Memorandum of Understanding.
 - (g) Acquisition procedures should clearly state how the objects will be used. The donor should be told of the object's intended use before the donation is made.
 - (h) Consumables, such as office supplies, merchandise for sale, fuel, and maintenance items are sometimes donated, and if so, acknowledgment should be made through a letter, email, newsletter, facebook or website.
- ii) Disposition Objects should be well-documented as to the reason and how. Object given to the Museum to be sold in order to benefit the Museum should be itemized and sold in a venue open to the general public so that no one person can be perceived as having an advantage over others. The funds gained for the sale of objects given to the Museum for sale can be used to benefit the museum and are not restricted to a specific use. Objects abandoned and not added to any of the other Museum collection categories and are in poor condition can be scrapped or thrown away.
- iii) Care These objects are in the Museum's possession so that they may be used for a particular purpose. Reasonable care should be given to these objects so that they survive as long as possible. However, it is understood that objects used in educational programs and for office use will wear out or become obsolete, and will be replaced.

- iv) Required Documentation Objects should be documented as to their intended use by keeping related correspondence and an incoming receipt describing the object and if the donor is known. Objects collected for the educational collection should have a simple numbering system that corresponds to the method of acquisition, use and location. Objects dropped off should have the appropriate documentation for the particular collection it is added to.

6) Inventories

All collections at the Museum will be inventoried on a regular basis according to standard museum practices every five years. The inventory should include physically locating objects, updating location databases and paper files, and assessing the object's condition and museum environment.

7) Insurance

The Museum, as part of the County of El Dorado government complex, is self-insured. A special "Fine Arts" policy is carried by the County with a blanket value for the entire collection, based on an estimate of worth. This means that the county will cover any losses to its own collection after a predetermined deductible. Objects on loan to the Museum should be insured by the lender if any additional insurance is to be acquired for the period it is own loan to the Museum.

8) Access to the Collections

The Museum is open to the public with a posted schedule on a regular and predictable basis. Special circumstances will cause the Museum's hours to be limited, such as weather conditions, a state of emergency or other outside forces. Since the Museum depends upon volunteers as staff, there are times when the Museum may close due to limited volunteer staffing, although this is to be avoided if at all possible. The Museum is a public building and has an obligation to be open to the public.

In order to provide an adequate level of protection to the collections, areas of the Museum are not open to the public. Special requests to see artifacts or archival materials not on display can be reviewed on an individual basis under special guidelines:

- a) Donors and their families sometimes want to "visit" an artifact, and if possible should be allowed to do so.
- b) Objects with traditional cultural meaning should be made available upon request, if possible.
- c) Researchers requesting objects as part of a legitimate research topic.
- d) Requests to touch artifacts by disabled persons should be allowed, if arrangements can be made in advance for specific artifacts, and careful handling under supervision can be arranged.

9) Security and Protection

It is the duty of the Museum to provide reasonable care for the items entrusted in its care. Policies should be in place to provide reasonable protection from theft and vandalism; facility systems should provide reasonable environmental controls and be maintained to prevent potential hazards; and fire alarm and suppression systems should be in place to provide reasonable warning and protection to the building, people, and the collections.

The Museum should have an up to date Emergency Response Plan which includes mitigation measures for anticipated emergencies.

An inventory system should be in place which allows for regular review and notice if an item is no longer where it should be. Due diligence should be made to find the item, and if part of the permanent collection or archival collection, the loss should be reported as this supports its return to the Museum if stolen.

10) Funding and Use of Proceeds Derived From Sales

The Museum, as part of the County of El Dorado's Library Department, receives an annual allocation from the General Fund to support basic operations, building and grounds maintenance, and one full time employee. Additional Museum support is granted, upon request, from the El Dorado Museums Foundation, a non-membership nonprofit organization. The El Dorado Museums Foundation revenue comes from Museum store sales, monetary donations, bequests to the Museum, and investments. Collections care expenses should be planned for as part of an annual budget process with both the Library Department and the El Dorado Museums Foundation.

The Museum store carries merchandise related to the mission of the Museum. No artifacts, archival material, or other items of historical value donated to the Museum should be sold in the store, as this can support the perception of misuse to donors.

All proceeds from the sale of deaccessioned objects should be used to benefit the Museum's collections, such as improvements to collections care, artifact restoration, or acquiring historically significant objects.

The Museum's collections are resources that are integral to fulfilling the Museum's mission. As such, Museum collections should not be capitalized or considered as financial assets by El Dorado County or other associated organizations.v

11) Attachments

- a) Forms
 - i) Deed of Gift Form
 - ii) Loan Form
 - iii) Temporary Custody Receipt Form

- b) Museum Collections Management Procedures
 - i) Archives (draft)
 - ii) Artifacts (draft)
- c) Other Museum Policies
 - i) Museum Ethics Policy (approved 11/6/2020)
 - ii) Acquisition Policy (approved 6/2000)
 - iii) Disposition Policy (approved 6/27/2000)
- d) Museum Commission Ordinance #4551 and By Laws
- e) Museum Administrator Job Description
- f) Museum Emergency Response Plan (draft)



DEED OF GIFT to the El Dorado County Historical Museum

Donor:
(Please print or type)

Address:

Phone:

Email:

Accession number: _____

I hereby give, assign and transfer to the County of El Dorado for the County Historical Museum all my right, title, and interest in and to the following described property:

Description of Property:

Dated: _____ **Donor Signature:** _____

I hereby consent to the above-described gift(s):

Dated: _____ **Spouse Signature:** _____

All gifts are subject to the rules regarding gifts described on the reverse.

RULES REGARDING GIFTS

The Museum shall have absolute discretion as to the use and retention of objects given to it as well as to where or for how long objects given to it shall be exhibited to the public.

The Museum's staff does not supply appraised valuations for objects received as gifts. The Museum does not accept responsibility for the adequacy or correctness of any estimates of value which may be supplied.

In receiving gifts of imported objects the Museum requires that the donor comply with all government customs or other requirements and will not be responsible for any non compliance with any applicable laws.

Contributions to the Museum may be deductible for income tax purposes, and are the responsibility of the donor to ascertain the value and complete the appropriate forms. You should consult with your attorney for tax advice.

ACCEPTANCE

I hereby accept the above-described gift(s).

Dated:_____ **Name & Title:**_____

Donee: County of El Dorado for the County Historical Museum



AGREEMENT FOR INCOMING LOAN

EL DORADO COUNTY HISTORICAL MUSEUM

104 Placerville Drive
Placerville CA 95667
Telephone: (530) 621-5865
E-mail: museum@edcgov.us

Date:

Lender's Name or Organization:

Phone:

E-Mail Address:

Mailing Address:

In accordance with the conditions set forth below, the objects listed below are borrowed for the following purposes:

for the period of _____ to _____, subject to Paragraph H below entitled Option Term.

OBJECT	DESCRIPTION (INCLUDE SIZE, WEIGHT, MATERIALS, CONDITION AND ATTACH A RECENT PHOTOGRAPH)	INSURANCE VALUE (PLEASE ITEMIZE AND INITIAL BY BOTH PARTIES.)

If additional space is necessary, please attach an extra sheet.

PACKING and SHIPPING

The following packing and shipping arrangements are proposed subject to review and approval by the Museum Administrator in consultation with the Lender:

Object(s) to be packed by (check one):

- ☐ Lender
- ☐ El Dorado County Historical Museum
- ☐ Other (specify) _____.

SPECIAL REQUIREMENTS AND CONDITIONS

Specify handling, installation, etc. (Attach continuation sheet if necessary):

CONDITIONS GOVERNING LOANS

A. Care, Preservation & Exhibition:

- a. The Museum will give to object owned by Lender the same care as it does comparable property of its own. Precautions will be taken to protect the object from fire, theft, mishandling, rurt and insects, and extremes of light, temperature and humidity while in the Museum's custody. It is understood by the Lender and the Museum that all tangible objects are subject to gradual inherent deterioration for which neither party is responsible.
- b. Evidence of damage at the time of receipt or while in the Museum's custody will be reported immediately to the Lender. It is understood that objects, which in the opinion of the Museum show evidence of infestation, may be fumigated at the discretion of the Museum.
- c. The Lender will be requested to provide written authorization for any alteration, restoration or repair. The Museum may examine objects by all modern scientific methods.
- d. The Museum retains the right to determine when, if and for how long the object borrowed will be exhibited.

B. Transportation and Packing

- a. The Lender certifies that the objects lent are in such condition as to withstand ordinary strains of packing and transportation and handling. A written report of condition of objects prior to shipment must be sent by the Lender to the Museum. Otherwise, it will be assumed that objects are received in the same condition as when leaving the Lender's possession. Condition recorded, which will include photographs, will be made at the Museum on arrival and departure.

- b. Costs of transportation and packing will be borne by the Lender, who will abide by the industry standard in the packaging selection of the mode of transportation of the object. The method of shipment must be agreed upon by both parties, and objects will be returned packed in the same or similar materials as received unless otherwise authorized by the Lender.
- c. The Lender will assure that said objects are adequately and securely packed for the type of shipment agreed upon, including any special instructions for unpacking and repacking.

C. Insurance

- a. Objects will be insured for the amount specified herein as agreed to by the parties, which must reflect the object's fair market value.
- b. Prior to shipping to the Museum, Lender must supply Museum with a certificate of insurance naming the Museum as an additional insured or waiving rights of subrogation. If the Lender fails to provide said certificate, this failure shall constitute a waiver of insurance by the Lender (see No. 4 below). The Museum shall not be responsible for any error or deficiency in information furnished by the Lender to the Lender's insurer or for any lapses in such coverage.
- c. In case of long-term loans, it is the responsibility of the Lender to notify the Museum of updated insurance valuations.
- d. If insurance is waived by the Lender, this waiver shall constitute the agreement of the Lender to release and hold harmless the Museum from any liability for damages to or loss of the loan property.
- e. The amount payable by insurance secured in accordance with this loan agreement is the sole recovery available to the Lender from the Museum in the event of loss or damage. Any recovery for loss of value by breakage shall be calculated as a percentage of the insured value specified by the Lender in the agreement.
- f. It is the responsibility of the Museum to notify El Dorado County Risk Management immediately upon the receipt of any item valued at more than \$50,000 so said item can be added to County's property schedule.

D. Reproduction and Credit

Unless otherwise notified in writing by the Lender, the Museum may photograph or reproduce the objects lent for educational, catalog and publicity purposes. It is understood that objects on exhibit may be photographed by the general public. Unless otherwise instructed in writing, the Museum will give credit to the Lender as specified on the face of this agreement in any publications. Whether individual labels are provided for objects on display is at the discretion of the Museum.

E. Change in Ownership and/or Address

It is the responsibility of the Lender or his agent to notify the Museum promptly in writing if there is any change in ownership of the objects (whether through inter vivos transfer or death) or if there is a change in the identity or address of the Lender. The Museum

assumes no responsibility to search for a Lender (or owner) who cannot be reached at the address of record.

F. Abandoned Loans

A loan terminates on the date specified on the face of this agreement. Upon termination of a loan, the Lender is on notice that a return of the object or renewal of this agreement must be effected. Failure by Lender to acknowledge that the loan has terminated will cause the Museum, by U.S. Postal Service return receipt requested, to notify Lender of the termination and request disposition of the object. Failure by Lender to respond to Museum's notice within 30 days following the mailing of the notice, then the objects will be maintained at the Lender's risk and expense for a maximum of one year. If after one year the objects have not been claimed they will be considered abandoned then and in consideration for maintenance and safeguarding, the Lender shall be deemed to have made the objects an unrestricted gift to the Museum.

G. Return of Loans Upon Termination of this Agreement

- a. It shall be agreed between Lender and Museum upon execution of this agreement who shall be responsible for the packaging, transportation and return of the object and the cost incurred thereon:
 - i. By Lender: Lender shall notify Museum at least 30 days in advance of its intended date of removal of the object and agrees to accomplish the removal only during Museum business hours. Lender further agrees to be responsible for any loss or damage to the object occasioned by the packaging, transportation and return of the object.
 - ii. By Museum: Museum shall notify lender of the date in which the object shall be shipped from the Museum and its intended arrival date at Lenders, address being:
 1. Method of transportation shall be mutually agreed upon by Lender and Museum. Museum's liability for loss or damage to the object, if any, terminates at the moment the object is no longer at the Museum.
 - iii. Terms other than above:

H. Option Term

- a. Subject to the mutual agreement of the parties, this incoming loan agreement may be renewed for
- b. successive 12 month terms. Museum shall notify lender, and lender shall notify Museum pursuant to Paragraph J below, whether or not it desires to extend the stated term of this agreement no later than 90 days prior to the stated expiration date. The notice shall specify proposed adjustments to the terms and conditions

of this agreement or shall specify that the proposed renewal is on the same terms and conditions.

I. Lender's Warranties:

- a. If a business entity: Lender represents and warrants that Lender is organized and existing under the laws of the State of California and that the person executing this agreement for Lender has all requisite power and authority to act for the business entity. Further, Lender warrants that the object(s) of this loan is (are) the sole personal property of Lender as a business entity.
- b. If not a business entity: Lender represents and warrants that if Lender is not a business entity, Lender warrants that the object of the loan is (are) its sole personal property.

J. Indemnity

Lender will defend and indemnify the Museum against and hold the Museum harmless from all claims, actions, proceedings, costs, damages and liabilities, including attorneys' fees arising out of and connected with or resulting from the loan of certain objects to the Museum when, including without limitations, the use, operation, possession or delivery of the object has caused the Museum to be subject to claims, actions, proceedings, costs, damages and liabilities, including attorneys' fees as a direct result of the Lender's intentional or negligent act.

K. Notices

- a. All notices and other communications required or permitted under this agreement shall be validly given, made or served if in writing and delivered personally or sent by registered mail to the parties at the addresses set forth below,
- b. **To Museum:** Museum Administrator, El Dorado County Historical Museum, 104 Placerville Dr., Placerville, CA 95667.
- c. **To Lender:**

(address) or any other address as either party may from time to time designate by giving written notice pursuant to this section.

L. Applicable Law

This agreement shall be governed by and construed under the laws of the State of California, and jurisdiction and venue for any dispute arising from or relating to this agreement shall be in the County of El Dorado,

M. Attorneys' Fees

If either party files any action or brings any proceeding against the other arising out of this agreement, the successful or prevailing party or parties shall be entitled to recover reasonable attorneys' fees and other costs incurred in that action or proceeding in addition to any other relief to which it or they might be entitled.

N. Entire Agreement Modification and Waiver

This agreement represents the entire understanding and agreement between the parties regarding the subject matter of this agreement and supersedes and replaces all prior agreements and understandings, whether oral or written. The provisions of this agreement cannot be amended, supplemented or changed, nor can any of its provisions be waived except by in writing signed by the party against whom enforcement is sought. No waiver or breach of this agreement shall be deemed to constitute a waiver of a further breach, whether similar or dissimilar.

O. Termination

The Museum retains the right to cancel this loan upon a sixty-day notice to the Lender, and upon expiration or earlier termination of this agreement, the Museum shall notify the Lender that the artifact shall be removed by Lender from the Museum within 30 days of said notice, failure by Lender to respond to Museum's notice shall cause the terms of Paragraph F to become controlling.

P. Authority to Execute on Behalf of Museum

Should the insurance value of the object be in excess of \$1,000 this agreement must be executed by the Director of El Dorado County Library Department as the County Contract Administrator. Should the insurance value of the object be less than \$ 1,000, as the El Dorado County Historical Museum Administrator would be designated as the County Contract Administrator and authorized to execute on behalf of the Museum.

IN WITNESS WHEREOF, the parties hereto execute this agreement as of the date and year set forth below.

Signed (Lender):

Date:

Signed (County Contract Administrator):

Date:

Title:



TEMPORARY CUSTODY RECEIPT

EL DORADO COUNTY HISTORICAL MUSEUM

104 Placerville Drive
Placerville CA 95667
Telephone: (530) 621-5865
E-mail: museum@edcgov.us

Date:

Depositor's Name or Organization:

Phone:

E-Mail Address:

Mailing Address:

For the following purpose* (check one):

- ☐ Consideration for donation
- ☐ Consideration for loan
- ☐ Identification
- ☐ Study
- ☐ Other (*Museum staff and volunteers cannot provide monetary value information)

The object(s) listed below are received subject to the CONDITIONS printed on the reverse.

OBJECT	DESCRIPTION (INCLUDE SIZE, WEIGHT, MATERIALS, CONDITION AND ATTACH A RECENT PHOTOGRAPH)	INSURANCE VALUE (PLEASE ITEMIZE AND INITIAL BY BOTH PARTIES.)

If additional space is necessary, please attach an extra sheet.

Removal date is: _____. If the object(s) is/are not removed by this date,
then the CONDITIONS on reverse will control.

CONDITIONS

1. The objects are accepted by the Museum for the benefit of the depositor and the Museum assumes no responsibility except the avoidance of gross negligence. The depositor hereby agrees to release and hold harmless the Museum, its employees, volunteers, officers, and agents from any liability in connection with the objects while on deposit or in transit except for clear gross negligence.
2. Insurance of the objects is the responsibility of the depositor
3. Attributions, dates and other information shown on the face are as given by the depositor. They are not to be construed as endorsed by the Museum. The fact that objects have been in the Museum's custody shall not be misused to indicate Museum endorsement.
4. Objects may be photographed and examined by modern scientific methods by the Museum for its own purposes, but will not be restored, treated, or otherwise altered without written permission of the depositor.
5. By execution of this document Depositor warrants that the object to be deposited in the Museum has not been acquired by illegal means and the possession of the object to be deposited by the Depositor does not violate any government regulation pertaining to environmental or importation laws.
6. If there is a change in the identity and/or address of the depositor or the owner, the Museum must be notified promptly in writing. Objects must be claimed on or before the removal date noted on the face of the Receipt. If one other than the original depositor claims objects, the Museum reserves the right to request proof of legal authority to receive the material before objects will be released.
7. Should the Museum decide to not accept the object for donation or loan, it is the responsibility of the Depositor to pick up the object at the Museum.
8. If the depositor of record fails to collect the objects or if delivery cannot be effected after the removal date, the Museum will mail the depositor at its address of record a warning to remove. The Museum assumes no responsibility to search for a depositor (or listed owner) not located at the address of record. If after six (6) months from the removal date noted on the face of this Receipt objects have not been claimed, then, and in consideration for their maintenance and safekeeping during such period, the objects shall be considered unrestricted gifts to the Museum and
9. accessioned or disposed of as determined by the Museum.
10. In the event the objects are being offered for sale or donation to the Museum, the depositor warrants that he/she is the legal owner of the object and upon request is prepared to establish that full and clear title to the objects can be passed to the Museum.
11. Should the Depositor be acting as the agent for the legal owner of the object to be deposited, that the agent warrants that he/she has the legal authority to act for the principal/owner.
12. This agreement shall be construed in accordance with the laws of California.

IN WITNESS WHEREOF, the parties hereto execute this agreement as of the date and year set forth below.

Signed (Lender):

Date:

Signed (County Contract Administrator):

Date:

Title:

PROCEDURES

Archives

Artifacts

CODE OF ETHICS

EL DORADO COUNTY HISTORICAL MUSEUM

Purpose

This Code of Ethics is a set of principles that guide the decisions of employees, volunteers, appointed commissioners, and associated non-profit board of directors who manage or work with County Museum collections and programs, provide guidance and advice, or perform any other associated Museum functions.

Professional Conduct for Museum Staff, Volunteers, and Commissioners

1. Museum staff, volunteers and commissioners should always act in the best interests of the County Museum and its mission
2. Seek the expertise and advice of colleagues when such input will benefit the museum collections and programs
3. Share information with colleagues and co-workers in order to benefit the museum profession at large, and credit sources for information received.
4. Foster a cooperative relationship between historical and professional associations in the interest of the museum collection.
5. Maintain current knowledge relevant to museum professional standards and best practices.
6. Avoid conflict of interest or the perception of conflict of interest in pursuing professional activities outside of the Museum, and in personal and business relationships.
7. Avoid revealing or profiting from information gained through work with the Museum
8. Clearly distinguish any personal activities, such as buying or selling for personal profit, from professional activities while employed or volunteering with the Museum
9. If there is personal collecting in the same subject areas as the Museum, do not compete with the Museum for potential donors and acquisitions; clearly identify personal collections on loan to the Museum
10. The Museum should be given first "refusal" in the event of a donation offer; any follow up for personal gain should not be done on Museum property
11. Staff, commissioners and volunteers should not accept gifts (money or objects) associated with their position in the Museum; if a stipend or tip is offered as the result of activities associated with the Museum, it should be donated to the Museum

Acquisition, Disposal, and Documentation

1. Acquire and dispose of collections consistent with the Museum's mission and Scope of Collections statement.
2. Acquire items only if the Museum can manage them according to the Museum's Collections Management Policy
3. Acquire items with legal and ethical provenance. Do not acquire, borrow or retain any object that may have been attained contrary to the laws of its country and the treaties of

the United States; if provenance is unknown, carefully consider the circumstances and available information on how the object was acquired or its history in the Museum's collections

- 4.
5. Only acquire local Native American cultural artifacts for preservation purposes. Many local objects were acquired years earlier by the donors in a manner that is now considered looting, or the donor does not know how it was acquired. These objects can be transferred to an appropriate Native American repository when requested and in compliance with the Native American Graves Protection and Repatriation Act (NAGPRA)
6. Never acquire human remains.
7. Acquire archival material and artifacts from county departments as transfers and make the material accessible upon request in a timely manner
8. Accept only unconditional gifts, unless the Museum Commission recommends an exception on a case-by-case basis.
9. Any staff, commissioners, and volunteers who influence decisions on acquisition and disposal, should avoid a conflict of interest or even the perception of a conflict of interest, by avoiding personal collecting in the same subject as the Museum.
10. No Museum employee, volunteer or commissioner should provide appraisal information on monetary value at any time, whether the object is being offered to the Museum or not. Provide information on obtaining appraisals but do not recommend any single appraiser.
11. Follow the Museum's Deaccession Policy by getting authorization from the County Board of Supervisors based upon the Museum Commission's recommendation, and then first offering surplus objects to other museums and historical nonprofit organizations. All remaining deaccessioned items should be sold in a publicly held and advertised sale, according to the County Board of Supervisor's Surplus Policy.
12. Funds received from the sale of collection items must be used to acquire, restore, and protect Museum collections
13. Museum staff and their relatives should never acquire anything that has formerly been part of the Museum collection. Volunteers should openly declare their interest when purchasing items that have been surplus, in order to avoid the perception of the a conflict of interest.

Preservation and Protection

1. Preserve and protect collections while also providing public access
2. Maintain a current Emergency Preparedness Plan identifying actions to protect collections and human health and safety
3. Keep information about the security of the Museum and the appraised value of objects confidential, except to assist law enforcement authorities
4. If conservation treatment is deemed necessary, it should be consistent with the American Institute for Conservation of Historic and Artistic Works (AIC) Code of Ethics

5. Store, handle, use, and exhibit objects and archival material to maximize their long-term preservation, unless specifically determined to do otherwise, and the decision is documented.

Access and Exhibits

1. Actively promote appropriate access to collections and data about the collections in order to increase public benefit
2. Maintain the confidentiality of data about the nature and specific location of resources which are endangered, threatened, rare, or commercially valuable
- 3.
4. Do not share the specific locations of Native American prehistoric domiciles, archaeological and funerary sites, or other cultural resources, unless there is a documented right to know.
5. Ensure that merchandise sold supports the mission of the Museum and its programs, and are not objects from the collection or specimens of a historical or archaeological nature
6. Never use objects from the Museum or Museum programs for personal purposes.
7. Consult with affiliated groups for the proper care and display of cultural objects, such as of Native American heritage or Chinese heritage.
8. Always exhibit objects in a respectful and factual manner, with accurate, well-researched information, and maintain accurate documentation about the collections in files and databases.
9. Carefully consider donors' request for special labeling or special placement, taking into account the exhibit's overall impression and emphasis.

Management

1. Ensure that all decisions involving donations to the Museum maintain integrity, impartiality, and public confidence. Avoid soliciting donations. Avoid accepting donations of money, collections, or services from sources that would contribute to creating a conflict of interest or the perception of a conflict of interest, including sources who are seeking contracts with the County, sources that would identify the Museum with alcohol or tobacco products, or parties that offer donations in order to state or imply the Museum's endorsement of an object, product, or service.
2. Maintain donation boxes at the Museum or associated with Museum programs only if 100% of the donations go to support the Museum and its programs
3. Avoid naming features or facilities for a donor
4. Treat all individuals in a respectful, courteous and professional manner

Human Resources

1. Do not require employees and volunteers to act in conflict with this code of ethics, or other relevant professional codes of ethics.

2. Ensure that employees, volunteers, and commissioners working with museum collections are informed of hazards inherent to the collections and are provided with protective measures.
3. Ensure that all employees and volunteers with direct responsibility for museum collections management have the knowledge, skill, and ability to perform assigned jobs.

Museum and the El Dorado County Code of Ethics

As the County Museum is a division of the County of El Dorado Administration with county-employed staff managing county volunteers, the Museum Code of Ethics will not conflict with the El Dorado County Code of Ethics.

Approval Authority, Review and Update

This Code of Ethics is approved by the Historical Museum Commission on _____ (date of meeting) and recommends that it be adopted by the El Dorado County Historical Museum, the County Library Department, and the County of El Dorado Board of Supervisors. This Code of Ethics should be reviewed and updated by staff and the Commission on a regular basis with the recommendation of every five years.

Signed (Chairman of the Historical Museum Commission):

Date:

Signed (County Library Administrator):

Date:

Signed (County, Contract Administrator):

Date:

ACQUISITION POLICY

EL DORADO COUNTY HISTORICAL MUSEUM

Questions to be asked when deciding to acquire an object for the museum

The following is a set of criteria to use when accepting new acquisitions for the museum. By accepting that object, we take on the responsibility to preserve and interpret it in a professional manner into the foreseeable future. New acquisitions should always be consistent with the Museum's collecting goals, and follow the procedures described in the Collections Management Policy (Oct 1999). The Museum Commission must review all objects with the conclusion included in the minutes.

Initial questions to be answered

Does the donor have the right to give the object to the museum?

If the object is to be purchased, do we have the money, or can funding be arranged?

If there are restrictions imposed by the donor, can we abide by those restrictions?

Are there any legal or ethical questions about how the donor acquired the object?

If found in the collection, how long have we had it?

Is the object appropriate to the mission of the museum?

1. Was it made in El Dorado County?
2. Was it used in El Dorado County?
3. Did someone own it from El Dorado County?
4. Is the object significant to El Dorado County?
5. Is there documentation for the object?

Do we have adequate space to exhibit or store the object?

- Do we have many others just like it?
- Is this object a better example than the others that we have?
- Is there room to exhibit or store the object under cover?

Will the object enhance the museum in any way?

- Is the object unique?
- Does the object fit in well with current planned exhibits?

Balance the desires of a possible donor with our responsibility to the museum

In order to have a healthy museum collection relevant to the museum's mission, it will be inevitable that we will turn down donations and so make potential donors unhappy. Alternative museums can be suggested (Folsom History Museum, Folsom Prison Museum are two possibilities), and an explanation of what we are trying to accomplish at this museum may soften the rejection. Our mission is not only to make donors happy.

DISPOSITION POLICY

EL DORADO COUNTY HISTORICAL MUSEUM

Purpose

To carry out its obligation to care properly for historic artifacts which relate to its mission, the El Dorado County Historical Museum must, at times, remove objects from the collection. By refining the quality of the collection, the County Museum can preserve and interpret the history of the county in a more effective manner. Museums commonly use the term "deaccession" to denote the process of removing an object from the museum collection, which includes evaluation, record keeping, and disposal method. Any funds gained from the disposal of these objects should be restricted to expenses related to the direct restoration or repair costs of objects remaining in the collection, or in the acquisition of more appropriate objects for the collection.

Decision to Deaccession

The Historical Museum Commission, with concurrence from the Museum Administrator, will make recommendations to the Board of Supervisors to deaccession objects currently in the possession of the County Museum, with or without a deed of gift on file. The procedures will follow the County Surplus policy and be done under the auspices of the Contract and Procurement Division. (See County Museum Surplus Policy)

Reasons for Deaccessioning are as follows:

- The object is not from El Dorado County
- The object is damaged beyond repair
- The object is one of many very similar objects already in the collection
- The object requires more space, funds, or restoration work than considered reasonable
- The object is outside the scope of the museum's mission

Establishing Title

Before an object is deaccessioned, the County Museum must make every effort to determine that the County has title to the object and no restrictions or conditions on that title exist.

Many objects on museum property are from an unknown source. It will be presumed that these objects are owned by the museum. If any questions arise regarding the title, County Museum staff will consult with County Counsel.

Record-keeping

Historical Museum Commission meeting minutes will reflect the decision to deaccession an object and how the method of disposal is determined. All information regarding the object's disposal will be filed with the original records and kept permanently.

Manner of Disposal

The manner of disposal will be determined for each object depending on its condition and value. The best and preferred method is through donation to another museum or non profit organization in order to be consistent the intention of the original donor's gift to the County Museum. However, if another museum or non profit cannot be found with reasonable effort, objects will be sold at public auction, or at a public sale. Some objects may be in such a deteriorated condition that they will be thrown away. In order to avoid the appearance of favoring one buyer over another, the County Museum will not privately sell museum objects directly to an individual. Items offered in trade for a donation which fits the County Museum's collecting guidelines will be reviewed by the Historical Museum Commission. Requests by a donor for the return of their object will be handled on a case-by case basis. Returning objects to donors can establish a dangerous precedent for the museum and the county, so such a request would need to be reviewed very carefully.

Disposal Policy and Procedures

Through the inventory process, many items in the Museum's possession are identified as accessioned artifacts appropriate to the Museum's collecting goals. However, some items, considered inappropriate for the Museum's permanent collection by the Museum Administrator, museum volunteers or Museum Commissioners, can be brought to the Historical Museum Commission to be evaluated for the following:

1. Accessioned artifacts in poor condition, or one of multiple examples, or now outside the scope of the Museum's mission
2. Artifacts of unknown origin in poor condition, or one of multiple examples, or outside the scope of the Museum's mission

If an item is determined by the Historical Museum Commission (with concurrence from the Museum Administrator) to be removed from the Museum's permanent collections, one of the following disposition methods will be followed (in order of preference):

1. Place the item in the Museum's educational or demonstration collections
2. Offer the item to another museum or nonprofit organization to be on display, thus staying consistent the possible original intention of the donor
3. Offer the item for sale to the public through a public sale or auction, following the County's Surplus Ordinance. All funds made from the sale will be held in the Museum Trust Fund administered by the County Auditors Dept, and expended upon the recommendation of Museum staff and the Historical Museum Commission.
4. Trade non-museum items in the museum's possession for items to be added to the Museum's permanent collection (i.e. historical photographs of other regions for historical photographs of El Dorado County)
5. Throw away items in very poor condition, or items that did not sell after a price reduction

Surplus Sale Guidelines

All items offered for donation or sale must be approved by the Board of Supervisors. This is done by submitting a comprehensive list with photographs to the Contract and Procurement

Division with the Board of Supervisors agenda items requesting the funds made in the sale be held in the Museum Trust Fund. After that time, working with staff in the Chief Administrators Office, the closed bid auction, public sale or other approved method will be scheduled, advertised and conducted.

Museum staff, volunteers and the Historical Museum Commission will make every effort to conduct the sale in open and transparent method, and will also make every effort to keep value and donor information confidential. To protect Museum staff, volunteers and Museum Commissioners, the following procedures will be followed:

- No items will be allowed to be removed from the County Museum or other usual place of storage
- Research into value, history and possible markets will be done discreetly and without spending an inordinate amount of time (keeping in mind the value of an item vs time spent on research)
- Advertising the sale and auction will only be done when the BOS has approved the sale and a date has been determined. Depending on the type of sale, a preview will be scheduled and advertised with the assistance of CAO staff.
- The Museum Administrator will be responsible for upholding these policies and guidelines



DEACCESSION FORM

Original Donor:
(Please print or type)

Original Accession number: _____
Attach original Accession Form (if available)

Date Deaccessioned: _____

Has the original donor been contacted?

☐ Yes

☐ No

Date & Notes: _____

Value of object: \$ _____ **How was this determined?**

Why is this object to be deaccessioned? (Reference "Reasons for Deaccessioning",
DISPOSITION POLICY)

How will this object be deaccessioned? (Disposal method.)

Dated: _____ **Museum Administrator:** _____

Approved by Museum Administrator (required):

Dated: _____ **Chairperson Signature:** _____

Reviewed by Museum Commission Chairperson (required):

Was there any disagreement with or within the Commission?

☐ No

☐ Yes. Summarize: _____

HISTORICAL MUSEUM COMMISSION ORDINANCE #4551

<[LINKED](#)>

HISTORICAL MUSEUM COMMISSION BYLAWS

<[LINKED](#)>

MUSEUM ADMINISTRATOR, ROLE DESCRIPTION

Class Title: MUSEUM ADMINISTRATOR

Class Code: 7628

DEFINITION

Under general direction, plans, organizes, and supervises the activities of the Historical Museum; supervises volunteer staff; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from Director of Library Services. Exercises direct supervision over volunteer staff. May provide technical and functional direction to lower-level staff.

CLASS CHARACTERISTICS

This is a single position classification with overall responsibility for the operations and activities of the Historical Museum including the preparation and administration of grants, the supervision and preparation of historical exhibits and the supervision of volunteer docents.

Examples of Duties (Illustrative Only)

- Plans, organizes, and supervises the programs and services related to the operations of the Historical Museum.
- Establishes program priorities to meet professional museum standards
- Plans, organizes, assigns, reviews, and directs the work of volunteer staff; provides for their training and technical development; participates in the hiring and selection of staff.
- Sets customer service standards and directly supervises visitor services and research services volunteers.
- Assists with the development and implementation of the museum's general fund budget; develops and applies non-profit funding sources.
- Coordinates and supervises public relations activities and the development of promotional material for the museum and related activities.
- Oversees the acceptance of artifacts, archival materials, and donations; supervises the preparation of historical exhibits; administers museum collections.
- Develops and oversees the museum's educational programming.
- Oversees site and building maintenance and coordinates with the County's facilities staff for repair work as needed.
- Serves as a resource in matters relating to preserving historical materials; assists researchers in use of museum resources; responds to history related requests; assists the Museum Commission in history related matters.
- Represents the museum on a variety of community and county committees and commissions.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of professional museum operations, including exhibitions, educational programming, and visitor services.
- Principles and practices of professional archival processing, evaluation, and assessment methods.
- Standards and techniques for preservation and protection of natural resources and historically significant artifacts
- Principles and practices of budget and fiscal management.
- Principles of education and public relations techniques.
- Principles and practices of volunteer management and supervision, including recruitment, review, training, and discipline.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Analyze and develop plans for improving museum services.
- Anticipate and analyze financial needs of the Historical Museum.
- Relate museum services to community needs.
- Identify historical significance and interpret artifacts and documents to others.
- Plan, organize, supervise, review, and evaluate the work of others.
- Train others in work procedures.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and the County in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications. and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.

- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education & Experience Requirements

Any combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying.

Equivalent to a bachelor's degree from an accredited four-year college or university with major coursework in anthropology, archaeology, history, or a related field, and two (2) years of experience in historical preservation, museum work, or a related activity. Coursework in museum studies is desirable. Progressively responsible supervisory experience is desirable.

Licenses and Certifications: None required.

Other Requirements

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including mainframe and desktop computers; vision to read printed materials and digital displays; the standard office position requires an employee to access their work location, attend meetings, use computerized workstations, and lift paperwork and light weight equipment or resources (less than 20 pounds). Typically, an employee will need to walk, stand, sit, use a keyboard, see, hear, bend, lift, and twist. The employee obtains information from oral instructions, conversations, written reports, email, the Internet, and professional publications, and will process and analyze the information obtained. The employee will provide information orally or in writing, and work on numerous concurrent projects and tasks under deadlines. Typically, an employee will need to mentally process and analyze complex information, compose complex responses, interact with others, and present information and reports. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve file information. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with members of the public or with staff under emotionally stressful conditions while interpreting and enforcing departmental policies and procedures.

HISTORY

JCN: 7628

Created: November 1998

Revised March 2018 18-0350

Insert County Museum Emergency Plan after review
and approval

ENDNOTES

- I. Malaro, page 46; page 409
- II. Website:
www.aam-us.org/programs/ethics-standards-and-professional-practices/core-documents/
The five Core Documents are: 1) Mission Statement, 2) Code of Ethics, 3) Strategic Plan, 4) Emergency Response Plan, 5) Collections Management Policy
- III. References used to create this document:
Books
 - Malaro, Marie C. A Legal Primer on Managing Museum Collections, Smithsonian Institution Press, 2nd edition. 1998
 - Museum RegistrationDocuments
 - Nevada State Railroad Museum Collections Management Policy (2006)
 - California State Railroad Museum Collections Management Policy (2010)
 - National Park Service Museum Handbook (2006)Museum Associations
 - California Association of Museums (CAM) General Annual Meeting sessions on current collections management practices (2020)
 - American Alliance of Museums (AAM) website at www.aam-us.org
 - American Association of State and Local History (AASLH) website at www.aaslh.org
 - "Connecting to Collections" reference library in the Museum Administrator's Office
- IV. AASLH "The Capitalization of Collections Ethics Position Paper #1"