

South Carolina Historical Society

COLLECTIONS MANAGEMENT POLICY

(As adapted from the Society of American Archivists' Archival Best Practices)

I. SCOPE OF THE COLLECTIONS

A. The mission of the South Carolina Historical Society (SCHS) To be updated with adoption of Strategic Plan.is to collect, preserve, and publish the history of the state of South Carolina. The collections - library, archives, and artifacts - serve and fulfill that mission.

B. The objects in the SCHS collections exist in one of the following categories:

- Vertical Files
- Manuscripts
- Photographs and prints
- Machine readable data
- Artifacts
- Plats, muniments, maps, and drawings
- Works of art
- Books, pamphlets, and serials
- Born Digital

C. Collecting goals and priorities

- Special emphasis will be given to acquiring items related to the Society's collecting themes.
- The Society shall attempt to broaden its holdings related to state groups, themes, issues, and events that are currently under-represented in the Society's collection.
- The Collections Committee will create a "Collections Preservation, and Expansion Plan," which identifies primary areas for active solicitation of additional items to the collections each year. This collecting plan will be made available to the public upon request.

II GOVERNANCE OF THE COLLECTIONS

A. The Collections Committee

1. The Collections is a standing committee of the Board of Members of the SCHS, made up of a minimum of three members.
2. The Executive Director and Head Archivist are ex officio, non-voting members of this committee.
3. One or more other archivists may be asked to attend Collections Committee meetings.
4. The Collections Committee is charged with the oversight of the Collections Policy:
 - a. Monitor and specify all procedures related to collections.
 - b. Submit quarterly reports to the BOM on the state of the collections.
 - c. Create a "Collecting Plan" for the Society.

B. Dissemination of Policy

Copies of the Collection Policy shall be made available to all persons who work with the collections.

C. Periodic Review

The Collections Policy shall be reviewed every two years. In particular, the "Collecting Plan," which identifies primary areas for active solicitation, will be examined and changed as necessary every fall.

D. Procedure for amendments and revisions to policy

Any member of the Collections Committee may make recommendations for changes to the Collections Policy. The recommended changes will be sent in writing to each member of the Collections Committee at least one week before the meeting at which they will be discussed and voted upon.

III. ACQUISITION POLICY

A. The title to every object accessioned must pass to the SCHS. Donors will be requested to sign a deed of gift giving the Society sole ownership of the item/s. Items offered as long-term loans will not be accepted.

B. Criteria for determining whether an object should be accepted:

- The object is consistent with the Society's mission.
- The object is documented as having been made or used in South Carolina.
- The object is consistent with the collection goals.
- The Society can properly store and preserve the object.
- The object will be utilized in the foreseeable future.
- The object is not encumbered with conditions imposed by the donor regarding its future use or disposition.
- The use of the object is not restricted or encumbered by intellectual property rights (copyright, patent, trademark, or trade secret).
- The use of the object is not restricted or encumbered by its nature (obscene, defamatory, potentially an invasion of privacy, physically hazardous).
- The object is so unusual that it presents an exceptional opportunity for the Society and thus should be given preferential consideration.
- The acceptance of the object in all probability will not result in major future expenses for the Society (for conservation or maintenance or because it opens a new area of collecting that has not been specified in the Collections Preservation, Conservation and Expansion Plan).

C. Items may be accepted as a:

- Gift
- Bequest
- Purchase
- Exchange

D. Special concerns and situations

1. Acquisitions by purchase shall be made only after:
 - proper financing has been arranged
 - the Director has verified that the budget will allow the purchase
 - For items of \$2,500 or above, the executive director will make a recommendation to the Executive Committee for approval or rejection.
2. Materials left anonymously in the custody of the Historical Society will be evaluated and considered for inclusion in the collections. If accepted, the deed of gift will be

signed by the authorized agent (the Executive Director) and will describe in detail the circumstances pertaining to the acquisition.

3. The Society may attempt to gain title to undocumented and/or unclaimed collections in its possession through the "abandoned property" law in South Carolina.

E. Accessioning Procedures

1. Identify appropriateness to the Society's mission and collections.
2. Obtain a signed Deed of Gift
3. Evaluate items, those deemed extraneous to the Society's purpose may be:
 - a. Returned to the donor
 - b. Transferred to another institution.
 - c. Offered for sale
 - d. Disposed of properly

F. Appraisals/Tax Deductions

1. All gifts to the SCHS are deductible on federal income tax forms according to Internal Revenue Service laws under 501C3c. By law, the donor is required to determine the value of the donation; staff is not allowed to give an appraisal of donations.

IV. DEACCESSION POLICY

- A. When the Society has accessioned an object, the item assumes a special status above that of ordinary equipment or personal property; it has become an educational asset. To remove that special status from an object, to retire its number from use thereafter, is a most serious action that requires more than cursory attention. Therefore any object removed from the collections and physically disposed of shall be done with strict conformity to the following rules:

B. Deaccessioning procedures:

1. 1. The Executive Director or Curator shall recommend items for deaccession if:
 - a. the object is a duplicate or the item lacks physical integrity.
 - b. the item is outside the scope of the mission of the SCHS
 - c. the item cannot be given the necessary care or preservation.
 - d. the item is inferior to others in the collection.
2. Any item having an estimated value of \$2,500.00 or less may be deaccessioned with the approval of the executive director, who shall report the activity to the Collections Committee at the next BOM meeting.
3. Any item having an estimated value of \$2,501.00 or more may be deaccessioned by the Collections Committee, upon recommendation by the executive director.
4. No materials shall be sold, given or otherwise transferred to SCHS employees, officers, managers, or their immediate families except with advance approval in writing.
5. The executive director will maintain a permanent record of the decision, describing the material, why it is being removed, and its final disposition. A copy of this record will be kept by the Archivist.
6. Unless otherwise directed by the Board of Managers, all proceeds from the deaccessioning of materials will be placed in a collections endowment fund.

V. USE AND ACCESS TO COLLECTIONS

- A. The SCHS preserves collections for use by researchers and should make available original research materials in its possession on equal terms of access. The Society will not deny access to materials to any researcher, nor grant privileged or exclusive use of

materials to any researcher, nor conceal the existence of any body of materials from any researcher, unless required to do so by statutory authority, institutional mandate, or donor or purchase stipulation.

1. At all times Staff and Volunteers must be aware of their responsibilities to preserve and protect objects in the collections.
2. SCHS materials are deemed reference resources and are not available for circulation.
3. The Library will be open during the hours that the Special Collections Department at Addlestone Library is open, to the extent that that is possible with staffing.

B. Patrons using the Library will be requested to comply with the following:

- Patrons are encouraged to use the computer search capability when first beginning a research project, when possible.
- Staff or Volunteers will locate and bring requested materials to researchers to the extent that this is possible.
- Leave coats and outerwear on the coat rack, put bags, pocketbooks backpacks, and bulky items into lockers.
- Bring only pencils, paper and laptops into Library.
- No eating, drinking or smoking is allowed in the Library.
- All materials should be handled as little as possible.
- All materials should be kept as flat as possible.
- Patrons will be asked to use cotton gloves for handling certain materials.
- Delicate or fragile items may be limited to staff only.
- The existing order of manuscript materials must be maintained.
- Archival materials must not be marked, damaged, or altered in any way. This includes the use of self-adhesive post-it notes, paper clips, pens, highlighters, etc.

C. Photocopying and Photography

1. If photocopying is requested, please contact a staff member. Not all materials are in a condition that will withstand the photocopying process. The staff will have final authority to decide which materials are suitable for photocopying.
2. Copies are provided for study purposes only. (See publication and copyright guidelines below.)
3. Researchers may make digital reproductions of materials in the Reading Room under certain circumstances, depending on the physical condition of materials and the rules of the Reading Room. If photography is requested, please contact a staff member.”

D. Publication and Reproduction Permission

1. Copyright protection extends to all unpublished works now protected under common law. This includes the collections of the South Carolina Historical Society.
2. Researchers must obtain permission in writing from the SCHS Executive Director to publish any materials from the Society collections. This includes the reproduction of photographs or materials. Penalties for copyright violation are severe.

VI. CARE AND CONSERVATION OF COLLECTIONS

- A. Every effort consistent with professional standards and ethics and within the financial resources of the Society will be made to preserve the collections.
- B. It is the responsibility of the Director and Archivists to recommend conservation procedures for items in the collections to the Collections Committee.
- C. The Collections Committee will recommend a Collections Preservation Plan to the Board of Managers every five years and recommend it to the Board for approval.
- D. The Society collections will be stored and exhibited in environmentally safe conditions with museum-standard levels of temperature and humidity to the extent possible.

The packing and shipping of collection objects moving in or out of the Historical Society will be supervised by an archivist or Director to ensure the utmost safety. The SCHS "Disaster Plan" requirements will be followed to ensure the best possible protection of the collections in the event of fire, smoke, or water damage, or natural disasters.

VII. LOAN POLICIES

- A. The Historical Society encourages maximum public access to its collections by making loans which are consistent with the long-term preservation of the collections and with the Society's own needs for exhibit and research.
- B. Incoming Loans/Borrowing: The Society may borrow objects from institutions or individuals for exhibition or study. These objects must receive the same care as our own collection. The following loan procedures shall be followed:
 - 1. Every loan will be for a specified period of time.
 - 2. Every loan will be documented.
 - 3. Loaned objects shall be returned according to the agreement or upon verbal or written order of the lender or his agent.
 - 4. In the case of death of the lender, after proper notification by the Historical Society to the legal representative, unless provided for in the lender's will, or notification to the Historical Society by the lender's legal representative or other provisions within six months after the death of the lender, the object(s), if still in the possession of the Historical Society, shall become the property of the Historical Society.
- C. Outgoing Loans/Lending: The Historical Society may make outgoing loans to other institutions for exhibit, research, or other purposes. The following procedures shall be followed:
 - 1. Loans shall be decided on a case-by-case basis upon recommendation of the Executive Director.
 - 2. Loans shall be made only to institutions
 - 3. unless approved by the Board of Managers, no loan shall exceed 1 year.
 - 4. Only those artifacts in stable, presentable condition will be considered for loan, unless conservation treatment for the objects is part of the loan agreement and is approved by the Executive Director.
 - 5. All costs are to be borne by the borrowing institution.
 - 6. Security measures at the host institution will be reviewed prior to loan approval.
 - 7. Insurance documentation must accompany all loan requests.
- 8. The SCHS may charge a Loan Fee based upon type of item, value of item, number of items requested, and duration of loan. This fee will be negotiated based on all of these factors.

VIII. STATEMENT OF ETHICS

The South Carolina Historical Society endorses the Code of Ethics established by the American Association of State and Local History. The Board of Managers, employees, and volunteers working with the collections are expected to abide by these standards.

This SCHS Collections Management Policy was approved by the Board of Managers on March 3, 2017.