

## COLLECTIONS POLICY AND PROCEDURES

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### I. Acquisitions and Donations

The following acquisition policies are derived from and in keeping with the mission of The Tampa Bay History Center “TBHC” (including its affiliated corporations) and apply both to permanent and education collections, except as noted.

#### **Mission** (as stated in the Master Plan)

*The Tampa Bay History Center serves as a dynamic and entertaining learning resource that inspires a sense of place and pride for diverse audiences of all ages through interactive educational programs and engaging exhibitions.* **1.1 General Policies**

1. The following conditions are to be met when items are acquired for the permanent collection of the TBHC. The TBHC must be able to provide for the storage, protection and preservation of items in keeping with professionally accepted standards and practices.
  - (a) Donations must be unconditional, that is, free from any contingency obligation on the part of the TBHC. A special exception will be made to accept extremely important restricted gifts in the Collection, only after a majority vote of the Collections Committee and final approval by the Board of Trustees. Items must be relevant to, and consistent with, the purposes and activities of the TBHC.
  - (b) Items will have permanency in the collection only so long as they retain their integrity, identity, authenticity, and their usefulness for the stated purposes of the TBHC.
  - (c) The TBHC endorses and will abide by the United Nations Education, Science & Cultural Organization (UNESCO) *Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property*.  
Public Law 97-446, Title III, “Convention on Cultural Property Implementation Act”
  - (d) The TBHC will not knowingly accept materials associated with the destruction of sites or in violation of U.S. or international laws. Knowledge of such actions will be reported immediately to the proper authorities. The TBHC adheres to the policies set forth by NAGPRA (Public Law No. 101-601) and Regulation 43 CFR Part 10.
2. Specific acquisition policies of this document are intended to be flexible enough to permit negotiation and acquisition of collections of outstanding value or those unique items that might present special opportunities.

3. All objects purchased under the discretionary acquisition funds policy will be reported to the Board of Trustees at its next meeting.
4. Objects acquired through purchase from vendors will carry a written guarantee of authenticity and originality.
5. Public recognition of gifts, acquisitions, or sponsorship will be provided when items are placed on exhibit and when annual or periodic reports are issued. Anonymity will be preserved when desired by donors or sponsors. Memorial statements will be included when appropriate; honorific statements may be made in honor of a living friend or relative.
6. The donation or sponsorship of outstanding collections may be publicized to the news media with the permission of donors or sponsors.

### **1.2 Donations (Acquisition by Gift or Bequest)**

Any and all objects offered as donations (gifts) to the TBHC are to be regarded and referred to, until formally accepted, as *Proposed Donation*.

1. The museum is under no legal obligation to accept a Proposed Donation bequeathed or offered to it.
2. TBHC will not accept a Proposed Donation of a group of objects unless TBHC is free to reject any objects that do not meet museum standards for accession as set forth in section 1.2 of this policy.
3. After receipt of the Proposed Donation, an *Acquisitions Proposal Form* (See Section IX, Forms, attached to this document) will be completed and signed by the Saunders Foundation Curator of History, and Collections Manager. A review, by these TBHC staff members, is made of all potential accessions and a recommendation is given to the CEO/President and Collections Committee for acceptance or non-acceptance.
4. TBHC shall acquire only those items that the Collections Committee and Saunders Foundation Curator of History determine will further its mission and purpose as outlined in Section III: Permanent & Education Collections of this Policy document.
5. Decisions concerning the acceptance of Proposed Donations are based on:
  - (a) The appropriateness of the object for the Collection – it is expected that all objects donated shall have exhibit, educational, or research potential;
  - (b) The quality – all objects shall possess physical integrity and authenticity;

(c) The appropriate condition and rarity – relative scarcity or the need for preservation of an object may justify special consideration; and

(d) Be in exhibitable condition.

6. Any and all objects presented as Proposed Donations should be accompanied by documentation completed by the Collections Manager and signed by the legal owner or duly authorized agent. [A copy of the donor's Power of Attorney paperwork, if applicable, should be attached. A Power of Attorney for agent, if applicable, should also be attached]

7. The donor will be notified, upon approval of the gift, by formal letter of the acceptance of said gift. No commitment shall be made as to exhibition, identification, or placement of donated or bequeathed items. Although it is the TBHC's intention to keep accessioned items for long-term use and preservation, no guarantee shall be made that a gift or bequest be retained by the TBHC in perpetuity. See Section IV: Deaccessioning and Disposals of this document.

8. Proposed Donations should be received by the TBHC no later than November 15 in order for the collections staff to complete the accession/cataloging process before the end of the calendar year.

9. The Proposed Donation should be consistent with the TBHC's mission statement, scope of collection, and all applicable code of ethics.

10. The acceptance of a Proposed Donation should not result in an expense for conservation disproportionate to the usefulness of the objects, unless for reasons solely within its discretion, TBHC accepts such expense.

11. A satisfactory provenance (custody/ownership history, e.g. previous owner(s), location, age or additional facts known by donor that would assist with the history of the item) for the object must be established.

12. Copyright issues for objects to be acquired must be considered. Staff maintains information on current rules that apply to copyright standards.

13. For all acquisitions, reasonable effort shall be made to comply with all applicable local, state, federal and international legislation.

### **1.3 Accessioning Process**

Definition: Accession is the formal process used to accept responsibility as a repository for, and to record an object as part of, the Museum's (TBHC's) collections. It involves the creation of an immediate, brief, and permanent record, utilizing a control number (accession number, e.g. 2009.001.001) for objects added to the collection from the same source at the same time, or for which the institution accepts custody, right or title.

1. A donation is complete when the TBHC's records show:

(a) A returned, dated, and signed "Deed of Gift" form, from the donor (or pursuant to the Power of Attorney given by the owner), is on file with the Collections Manager;

(b) The gift(s) has been assigned an accession number(s) by the Collections Manager;

(c) A condition report has been completed by the Collections Manager and reviewed by the Saunders Foundation Curator of History;

(d) The object is insured under TBHC collections policy.

2. A "Deed of Gift" is a contract that transfers ownership of an object(s) from a donor to the TBHC. It lists the object(s) along with an accession number for each.

(a) After a donation is accepted and approved, a formal letter, and two Deed of Gift Forms [See Section IX, Forms, attached to this document] are sent to the donor with the request that one signed acceptance is to be returned to the TBHC;

(b) The original, signed form is maintained on file by the Collections Manager within the Curatorial Department;

(c) A report will be made to the Collections Committee as to the status of all Deed of Gift Forms; and

(d) The members of the Board of Trustees will receive an annual report on all acquisitions.

#### **1.4 Purchases**

1. Items to be considered for purchase shall be brought before the Collections Committee and shall be accompanied by documentation that identifies sufficient and appropriate purchase funds. The Committee may approve the purchase of an item subject to designation and approval of purchase funds by the Executive Committee of the Board.

2. Before an item is purchased by the TBHC, the Collections Committee shall be satisfied that the proposed purchase price is fair and reasonable.

3. Purchases from individuals presently or formerly associated with the TBHC shall be discouraged, unless:

(a) All acquisition criteria are met;

(b) No other sources are available;

(c) All appropriate staff strongly recommends such purchases be made.

4. In order to purchase materials for the Permanent Collection, an "Acquisitions Proposal" form must be completed and submitted to the Collections Committee for approval. [See IX, Forms].

### **1.5 Discretionary Purchases**

1. Funds from the acquisitions budget may be committed for purchase of objects without prior approval of the Collections Committee. The CEO/President has discretionary purchase allocation authority up to and including fiscal year budgetary (line) approval by the Board of Trustees. The Public Programs Division may purchase items within the amount designated. The Saunders Foundation Curator of History will be signatory with final approval from the CEO/President.

2. The same criteria apply to discretionary purchases as to any acquisition.

3. An object may be acquired through exchange for an object deaccessioned from the museum's collections. Exchanges are initiated by the professional staff of the museum and approved in accordance with the provisions of the museums' Accession and Deaccession Policies. Objects considered for exchange are to be of equal aesthetic, scholarly, or monetary value. No exchanges will be made with private persons.

### **1.6 Conservation**

1. The TBHC staff shall employ professional standards regarding care and conservation of the collections and objects on loan shall be preserved under a program of maintenance, research documentation and conservation in accordance with generally accepted museum practices, as stated in *The Care of Historical Collections: A Conservation Handbook*, E. Guldbeck, AASLH, Nashville, 1982 and *Manual of Curatorship*, John M. A. Thompson, (211 - 259).

2. Staff members shall report all damage or loss of items to the Saunders Foundation Curator of History, Collections Manager, or designee as soon as discovered. A "Damage or Loss Report" [See IX, Forms] will be completed and, if appropriate, steps shall be taken to repair or report loss to the insurance company.

## **1.7 Records**

1. The TBHC shall maintain records of all objects within its collections in accordance with procedures outlined in the accepted AAM accreditation records or *Museum Registration Methods*, Dudley and Wilkinson. This includes establishing an accession/donor number, signed gift form, donor file and card, loan record, photographic catalog and condition report.
2. The Collections Manager is the designated collections management system administrator. The Saunders Foundation Curator of History oversees the computer database of cataloguing information for all collections objects, research library and education collection objects, maintaining standards of accuracy and thorough documentation.
3. Periodic reviews of newly created data, as well as periodic reviews of lexicon terms are performed by the Registrar and made available at the next department meeting.
4. If an object is declined, the Saunders Foundation Curator of History will notify the owner and explain why the object was not accepted and may suggest other institutions that might be interested in the object. The object will be returned to the owner, along with all related materials.

## **1.8 Appraisals**

1. Under no circumstances shall the TBHC staff or members of the Board of Trustees provide monetary appraisals of items to donors or potential donors. Appraisals must be "arm's length" transactions in accordance with Internal Revenue Service guidelines. The staff may, if given permission to do so, help donors find qualified appraisers.

## **1.9 Valuation**

1. Donations made to the TBHC are tax-deductible as a charitable contribution for the value of the item in accordance with the Internal Revenue Service guidelines. The TBHC will not provide the Internal Revenue Service with any valuations of gifts. This is the responsibility of the donor.

## **II. Collections Committee**

### **2.1 Collections Committee**

1. The Board of Trustees shall establish a Collections Committee. The Committee will consist of at least two members of the Board of Trustees, and not less than three or more than five additional members chosen for their knowledge and expertise in history and material culture. The CEO/President, the Saunders Foundation Curator of History and the Collections Manager

will serve as ex-officio members of the Committee. Committee members will be notified of meetings at least one week in advance, and three or more members will constitute a quorum.

2. The Collections Committee shall present, at least one time each year (prior to the last day of the year) a complete list of all acquisitions and deaccessions at that time, the Board will have the opportunity to accept or reject item(s) prior to final ratification.

## **2.2 Purpose of the Collections Committee**

1. The purpose of the Committee is to assist the TBHC staff in the following:

- (a) Review of proposed acquisitions, donations and purchases and provide advice on matters within the areas of expertise of the Committee members;
- (b) Disperse knowledge in the community concerning the collections needs of the TBHC;
- (c) Assist in developing potential sources of collections-related monetary gifts;
- (d) Act as a resource and support group in matters of policy;
- (e) Keep a written record of the Collections Committee recommendations, actions and votes and distribute the minutes of each meeting to the Board of Trustees.

2. All recommendations will be reported to the President of the Board of Trustees by the CEO/President and Committee immediately following approved minutes of the last meeting.

## **III. Permanent and Education Collections**

### **3.1 General Policy**

The TBHC may generally make a distinction in categorizing their objects into two primary collections -- permanent and education. The permanent collections are those objects that are owned by the museum. A research collection is a sub-category of the permanent collection used by academics and scholars for said purpose. The education collection is those groups of objects from the permanent collection that may be handled by students and adult visitors for the purpose of expanding the museum experience.

TBHC adheres to the recommendations of the American Alliance of Museums recommendation of FASB Standard No. 116 and GASB Statement No. 34 which state that an entity need not recognize contributions of works of art, historical treasures, and similar assets if the donated items are added to collections that meet the following conditions:

(a) Are held for public exhibition, education, or research in furtherance of public service rather than financial gain;

(b) Are protected, kept unencumbered, cared for and preserved;

(c) Are subject to an organizational policy that requires the proceeds from sales of collection items to be used to acquire other items for collections.

### **3.2 Specific Policies for the Permanent Collection**

1. Priorities for the acquisition of specific types or categories of objects will be established in a written and Board approved list for the purpose of a Master Plan or long-range exhibitions and collections goals.

2. The following are appropriate for the TBHC Collection: (a) artifacts and archival materials manufactured or used in the area, or generic examples of the same, (b) items from outside the focus area may be acquired or received by gift if their presence will substantially contribute to an understanding and interpretation of the primary holdings.

### **3.3 Specific Policies for the Education Collection**

1. Items designated as educational items and placed in the Education Collection will: (a) have educational use, or (b) be duplicate items in the Permanent Collection, or (c) be of inferior quality due to their inherent condition or past restorations, or (d) be professionally completed replications.

2. Such items are typically intended for hands-on use in lectures, gallery loans to school groups, trade with other institutions, or for sale in conformance with TBHC deaccession policies.

3. The donor or sponsor will be informed verbally and in writing (Deed of Gift form) at the time of receipt if the immediate intent is to place the item in the Education Collection rather than the Permanent Collection. The meaning of that designation is to be made clear to the donor or sponsor.

4. Items may be transferred from the Permanent Collection to the Education Collection in accordance with the deaccessioning policies of the TBHC. Items in the Education Collection may, at any time, be reassessed and transferred to the Permanent Collection by action of the CEO/President upon the recommendation of the Saunders Foundation Curator of History.

### **3.4 Acquisition Materials Deemed to be Spurious, Heavily Restored or Replicas**

1. It is accepted that staff members and members of the Collections Committee cannot be

expert in all areas of material culture. Occasionally, despite the due diligence of those involved, items acquired through donation or purchase may be determined to be spurious, heavily restored or reproductions.

2. Should an item in the Permanent Collection be discovered to be spurious, heavily restored or a reproduction, the following will apply:

(a) In the case of a donated item, it will be returned to the donor with a written statement that the item has been found to be spurious, heavily restored or a reproduction. Care will be exercised to preserve the good will of the donor and respect his/her sensitivities. If a Donor or his/her immediate heir is deceased, cannot be located, or refuses the return of the object, it may be added to the Education Collection or disposed of in accordance with the policies established by the Board of Trustees of the TBHC.

(b) To avoid embarrassment to donors, sponsors or the TBHC, no statements regarding items found to be spurious, heavily restored or reproductions will be made public by the Board of Trustees, Collections Committee or staff of the TBHC.

(c) In the case of an item purchased from an individual or a vendor, the vendor will be contacted to negotiate a refund, credit or exchange.

(d) If a spurious, restored or replica item is sold, it must be completed in a manner to insure that it will not reappear on the antiques or collectibles marked in a guise of authenticity.

#### **IV. Deaccessioning and Disposal of Collections**

##### **4.1 Definition of Deaccessioning and Disposal**

1. *Deaccession* is the process by which the TBHC removes an item from the Permanent Collection. Such items may be considered for the Education Collection or for disposal via transfer to another similar institution.

2. *Disposal* is the method (sale, trade, gift, or destruction) by which a deaccessioned item is removed from the management of the TBHC. Deaccession always precedes disposal.

##### **4.2 Deaccession from the Permanent Collections**

1. It is intended that items accepted into the Permanent Collection of the TBHC will reside in that collection as long as they retain their physical integrity, are considered authentic, remain useful for educational purposes, and can be stored and preserved according to professional

standards. However, the museum recognizes the importance of periodic evaluation of the collections and that judicious use of deaccessioning may strengthen the quality of the museum's collections over time. The museum holds collections in the public trust, which obligates acting in accordance with the highest ethical standards as defined by the American Alliance of Museums.

2. Deaccession of items may be considered when:

- (a) The item deteriorates past the point of practical or economical restoration;
- (b) The item is discovered to be spurious, a reproduction or heavily restored;
- (c) The item is no longer useful for educational purposes;
- (d) The item cannot be stored or preserved according to museum standards,
- (e) The item has been acquired in superior condition and provenance does not warrant retention in the Permanent Collection;
- (f) The object is determined to be over-represented in the collection;
- (g) It is determined that the museum's possession of an object is not legitimate;
- (h) Unintentional destruction, which results in a de facto deaccession status for the object, the standard procedures do not apply. It will be sufficient for the Collections Manager to inform the Saunders Foundation Curator of History of all particulars concerning the loss;
- (i) Materials may be deaccessioned because the repository has changed its collections policy and the material is no longer within its scope.

Deaccessioned material may be offered back to its donor, offered to another institution, or destroyed. Deaccessioning is also called **permanent withdrawal**.

3. Fashion, subjective personal opinions, or the prevailing taste of the day should play as little part as possible in the decision to deaccession and/or dispose of an item.

#### **4.3 Procedure for Deaccession**

1. The following procedures apply to the deaccession of any item in the Permanent Collection, as recommended in the *Code of Practice for Museum Authorities*, American Alliance of Museums, Washington, D.C.

(a) The Saunders Foundation Curator of History and Collections Manager will complete a deaccession report describing the item(s), its ownership history, and the reason for the proposed deaccession and a recommendation for the method of disposal.

(b) The TBHC staff will make a good faith effort to ascertain whether the item(s) in question is affected by donor/sponsor restrictions or stipulations.

(c) The TBHC staff will make a good faith effort to contact the donors/sponsors of item recommended for deaccession to inform them of the proposed action and reasons for action. The preferences and sensitivities of such donors/sponsors will be considered, but may not take precedence in the final disposition of the item(s).

(d) A request to deaccession and a recommendation will be submitted to the Collections Committee for concurrence. Collections Committee will make recommendation to the the Board of Trustees. The Board of Trustees have final authority and will make final decision regarding all deaccessions.

(e) Hillsborough County and/or State of Florida statutes and policies governing the accession and disposal of public property will be strictly observed.

(f) Items on long term loan will not be deaccessioned or disposed of unless the donor or designee cannot be located after a good faith effort and the item(s) are legally considered under Florida law to be abandoned property as referenced in Section 4.4, no. 7.

#### **4.4 Disposal Procedures**

When an item has been duly deaccessioned in accordance with Section 4.3 and is ready for proper disposition, (as stated in Section 4.2, no. 2) the following procedures will apply:

1. The Saunders Foundation Curator of History and Collections Manager will prepare a memorandum describing the proposed method of disposal and citing prior approval of the Collections Committee.
2. The manner of disposal of items from the Permanent Collection should be in the best interests of the TBHC, the public trust, and the scholarly or cultural communities served by the TBHC. First consideration will be given to placing items in another nonprofit public institution, through trade, exchange or sale, wherein they may serve appropriate purposes. If items are to be sold, they will be offered for sale at advertised public auction or other market in a manner that will best protect the interests, objectives, good name and legal status of the TBHC.

3. Preference will be given to retaining, within the State or the United States, any item that is part of its historical, cultural, artistic or scientific heritage unless there are good and sufficient reasons in the opinion of the Collections Committee to do otherwise.
4. Proceeds from sale or auction of disposed property will be designated for future acquisitions under restricted funds. The Board of Trustees of TBHC shall ensure that such funds will be used exclusively for the purchase of objects for the collections as is prescribed by AAM's Code of Ethics.
5. A permanent record of the conditions and circumstances of the deaccessioning and disposal of items will be retained in the permanent files of the TBHC.
6. Items will not be given to or sold privately to members, or the relatives of members, of the Board of Trustees, the Collections Committee, or the TBHC staff.
7. The policy shall adhere to current adopted Florida State Statute (265.565) Title XVIII: Memorials, Museums and Fine Arts regarding "property loaned to museums; obligations to lenders; notice; loan termination; acquisition of title; liens; conservation or disposal.

## **V. Loan Policy**

### **5.1 General Conditions**

1. Material from the Permanent Collection or Education Collection of the TBHC is lent only to bona fide museums, historic societies or sites, or university research facilities on the recommendation of the CEO/President and Saunders Foundation Curator of History for purposes of exhibition or research.
2. Materials will not be loaned in an unsupervised fashion to members of the general public, independent researchers, commercial firms, or for entertainment purposes.
3. The sole exceptions to this prohibition are lectures, public relations presentations, development events and special media presentations made by the members of the Board of Trustees, CEO/President or the curatorial staff of the TBHC. The item(s) will not leave the person of the individual entrusted with them, will be properly documented on a loan form and will be covered under the TBHC collections insurance policy. It is preferable that two members of the staff are present during the situations(s) above.
4. No items may be used for commercial promotions or purposes without the approval of the CEO/President, Collections Committee and the Board of Trustees.
5. Loans are normally made for periods of up to one year. Loans for longer periods may be negotiated at the discretion of the CEO/President, Saunders Foundation Curator of History, and

the Collections Manager. A written request must be made to renew a loan and the request to renew a loan is subject to approval by the CEO/President or Saunders Foundation Curator of History and Collections Manager. The Collections Committee and Board of Trustees will be made aware of all significant loans.

6. Copies of research materials, negatives, prints or slides of the TBHC Collection objects may be sent on a loan basis to other museums or like institutions for the purpose of examination, for loan or deaccessioning.

7. The borrowing institution may not loan materials to third party institutions or individuals.

8. When objects from the TBHC Collection are loaned to other institutions or organizations that wish to place the loaned objects in a traveling exhibition, they must obtain prior approval from the TBHC for each institution on the itinerary. The TBHC will furnish the sponsor with copies of its loan document for this purpose.

9. Borrowing institutions must complete the standard Facilities Report Form. [See IX, Forms]. They also must respond to any questions and furnish proofs deemed appropriate by the Executive Director and the professional staff of the TBHC. Review and approval of the Facilities Report Form and answers to supplementary questions must precede any approval of loans. In appropriate cases, the borrowing institution must cover the cost of on-site visits by the TBHC representatives to view facilities and security arrangements.

10. Loaned materials may not be altered in any way, or reproduced by casting, copying, or other methods without written permission of the Saunders Foundation Curator of History. Objects are not loaned if there is an unreasonable risk to the objects or if the objects may be put to objectionable use that would reflect poorly upon the integrity of the objects or the museum.

## **5.2 Insurance for Loaned Objects**

1. No loans will be approved, or items forwarded, until the TBHC is in receipt of a certificate of insurance.

2. Such certificates must include transportation insurance coverage of the items at the valuations stated on the TBHC loan form.

3. In the event of a total loss, the borrower's insurance carrier must pay the value stated by the TBHC. If the borrower's carrier reduces the value through re-appraisal or independent mediation, the borrowing institution is responsible for the difference between stated value and the carrier's coverage.

4. In the event of damage to an item, written notification to the TBHC must be made in a timely fashion, the damage claim must be promptly paid, and the remains of the item returned to the TBHC for restoration or deaccessioning and disposal.

5. Insurance must specify that, in the event of recovery of lost or stolen items, said items will be promptly returned to the TBHC in exchange for the insurance settlement previously made without penalties, interest or charges. Damages to the materials will be deducted from the return of settlement.

6. In the event a carrier does not agree to the above provisions, the borrowing institution must agree to the terms.

### **5.3 Responsibilities of Borrowing Institutions**

1. The following expenses are to be borne by the borrower, unless prior written agreement is made for alternatives:

(a) Evaluating the facilities of the borrowing institution;

(b) Supervision of shipping, installation and de-installation when deemed necessary by the CEO/President and designated TBHC staff;

(c) Costs of shipping, installation and de-installation;

(d) Cost of insurance;

(e) Costs of all legal actions required to enforce the rights of the TBHC loss.

2. All material must be packed and transported by a professional "fine arts" shipper. The borrowing institution, subject to approval by the TBHC, normally makes arrangements.

### **5.4 Permissions and Credits**

1. A proper credit line for the TBHC shall be displayed with all loan material: "On loan from The Tampa Bay History Center." Additionally, a credit line may also apply, for example: "Gift of \_\_\_\_\_ to the Tampa Bay History Center Collection."

2. Loan material may be photographed for record and research purposes and for publicity in conjunction with the specific exhibition in which the material appears. Permission to publish photographs in an exhibition catalog and elsewhere must be obtained in advance from the office of the CEO/President or designee.

3. The TBHC claims the right to review any publicity materials concerning its loans before release to the media.

### **5.5 Valuations**

1. Borrowing institutions are prohibited from releasing any information regarding the insurance or market values of items on loan to the public, researchers or the media. Only the insurance carrier and law enforcement officials may receive such information.

### **5.6 Unclaimed Loans/Abandoned Property**

1. Unclaimed loans will be resolved following accepted procedures as outlined in *The New Museum Registration Methods*, Buck and Gilmore, editors, published in 1998 by the AAM.

2. Generally, unclaimed loans are long-term loans left unclaimed by the owner over a long period of time. Abandoned property is any object for which a formal loaned agreement does not exist. These are most likely objects which were unsolicited by the museum (objects left in custody) or simply loans for which no formal agreements were ever processed.

3. Florida Statutes will be followed for all procedural efforts. Notice will be sent by certified mail (return receipt requested) to the last known owner at the most recent address on record. If no address is on record, every effort to determine such an address, including, but not limited to public notice will be made. See Florida Statute Title XVIII, Ch. 265 for entire regulations.

4. Loans may not be considered for termination and their titles transferred to the museum unless the following requirements have been met.

(a) The object has been on indefinite loan and held by the museum for 5 years or more. If an object has been on "permanent" loan, that object shall be considered loaned for an indefinite term.

(b) The object has been on loan for a specified amount of time and no action has been made by the lender to claim the object once the loan period has expired and the museum has given notice of the termination of the loan.

### **5.7 Objects Found in Collections**

As in many collections, the museum possesses objects, which lack sufficient documentation to determine how, or if, they entered the permanent collection. "Objects found in the collection" differ from abandoned property and unclaimed loans in that no record of past or current ownership exists. Some of these undocumented objects are known to exist, while others may be expected to appear at times of inventory or other collections review processes.

1. Care and Documentation: (a) the objects should be identified, as much as possible, and labeled by the registrar to avoid confusion, (b) the objects may receive a sequential accession number and proceed through cataloguing, and (c) must be designated as a found object.
2. The museum recognizes the possibility that the object may be claimed by the rightful owner at a later date and shall return the object if adequate proof of ownership is given.
3. If necessary, further legal counsel will be consulted regarding issues and legislation specific to the state of Florida.

## **VI. Exhibitions**

### **6.1 Scope of Exhibitions**

1. The principal scope of exhibitions will be the history and material culture of historic Hillsborough County. A secondary role will be to present temporary exhibits on regional, state and national history that will attract, educate and enrich residents and visitors and be relevant to the mission of the TBHC.

### **6.2 Exhibition Standards**

1. The TBHC receives support from private, corporate donors and governmental sources. In recognition of this wide base of support, it will endeavor to represent and serve its many constituencies. It will also seek to understand, recognize and foster the rich heritage of the area in its exhibits and programs.
2. The Board of Trustees is aware that a wide diversity of individual opinions exists concerning what is acceptable for exhibition. It strongly believes that censorship of exhibits should be avoided and that the professional staff will apply sound professional judgment and balance in determining the content of exhibits and interpretation of historical events.
3. In keeping with current TBHC philosophy, and with respect for all cultures, the TBHC will avoid exhibition of human remains and funerary remains, either prehistoric or historic.
4. It is intended that the display of culturally sensitive materials or sacred objects must be accomplished in a sensitive manner acceptable to those whose beliefs and such materials represent cultures. If possible, such exhibits are to be designed in cooperation with representatives of the cultures.

### **6.3 Policy on Items Loaned for Exhibition:**

1. A loanee shall agree to the current Loan Form Policy. The loanee may be required to carry collections, transportation or other insurance on an object or objects loaned to the museum.
2. Or, the Tampa Bay History Center will carry such insurance upon mutual agreement with the loaning institution or loanee.
3. A standard AAM Facility Report must accompany any and all loans.
4. Professional standards of care; conditioning and curation will be followed.
5. Items on loan to the Tampa Bay History Center will receive the same professional care as those in the permanent collection.
6. While on display, each item will be identified as the property of the Lender. The museum may photograph, telecast, or reproduce the objects (s) for the purpose of scholarship, publicity or curation unless otherwise notified by the Lender.

## **VII. Photographic Policy**

### **7.1 Use of Cameras and Recording Equipment in the Exhibition Galleries, Library or Map Room**

1. The use of hand-held cameras and recording equipment must be authorized by the CEO/President or Saunders Foundation Curator of History. A Use of Media form must be completed and signed by all parties.
2. Objects on loan to the TBHC may not be photographed or duplicated in any manner without the express permission of the lender(s).
3. Extensive photography, or the use of tripods and/or special lighting equipment, requires prior approval to assure the safety of exhibition objects, the convenience of the TBHC visitors and the maintenance of copyright restrictions. Materials photographed may not be published or reproduced without the express written permission of the CEO/President or Saunders Foundation Curator of History or designee.
4. The TBHC will endeavor to observe all U.S. and international laws including copyright law as they apply to copying materials.
5. A Permission to Photograph form [See IX, Forms] must be signed by both the photographer and a designated TBHC staff member. All signed forms are maintained on file.

### **7.2 Photographic Reproduction Policy**

## 1. Use of Photographs

(a) Most photographs in the TBHC collection are available for reproduction and use by the public.

(b) The user assumes all responsibility for conforming to the laws of libel and copyright, which may be involved in the use of materials. The TBHC reserves the right to refuse to copy or permit the copying or reproduction of materials, which it feels, may be in violation of copyright laws.

(c) The TBHC may also refuse the reproduction of any of the following:

- (i.) Materials not yet processed into the Permanent Collection;
- (ii.) Materials that may be damaged by reproduction processes;
- (iii.) Materials currently being used by the TBHC;
- (iv.) Materials with reproduction restrictions.

2. Credit: Proper credit must be given to original materials: "Courtesy of The Tampa Bay History Center." Special Collections credit line may also apply, for example: "Gift of \_\_\_\_\_."

3. Reproduction fees are charged at the commercial rate. Reproductions may be requested, when applicable, as prints, copy negatives or digital format. A current fee schedule is available upon request. The fee schedule will be revised periodically to adjust fees in keeping with current market values.

4. Failure to comply with the credit or fee will result in any or all of the following: refusal to permit the use of photographs in the future; retroactive credit and payment; compensatory payment; legal action.

5. A Photographic Reproduction Agreement form [See IX Forms] must be signed by both the user and a designated TBHC staff member. All signed forms are maintained on file.

## **VIII. Ethics**

### **8.1 General Statement**

1. The position of a TBHC Trustee or staff member involves great responsibility. Each Trustee or staff member is expected to be a person of integrity and high moral principles who carefully avoids any action that could compromise him/her. The reputation and name are invaluable assets that must not be exploited or discredited.

2. In establishing policies, or authorizing or permitting activities, Trustees especially must ensure that no policies or activities jeopardize the basic nonprofit status of the TBHC or reflect unfavorably upon it as an institution devoted to public service.

3. Trustees and staff members must understand and respect the basic documents that provide for the establishment, character, and governance of the TBHC.

4. The Board of Trustees and TBHC staff subscribe to the standards of the AAM Code of Ethics for Museums and TBHC's own institutional Code of Ethics, which is in conformance with the AAM Code.

6. As a non-profit institution, the museum also complies with applicable local, state, and federal laws, international conventions, and specific legal standards governing trust responsibilities.

## **8.2 Personal Collections**

*Disregard for the policies in this section may lead to censure, reprimand or dismissal.*

Although the Tampa Bay History Center encourages personal collecting to increase one's professional judgment and knowledge, an employee must not compete with the museum, use any privileged information or use their affiliation to promote their own, their family's or their associates' personal collecting activities. Whenever a conflict develops between the desires of the employee and the need of the museum, the needs of the museum prevail.

1. Staff members shall not form (collect or acquire) personal collections of items that are the same as, or similar in nature to, those collected by the TBHC.

2. Staff members may maintain personal collections of items that are the same or similar to those of the TBHC's Permanent Collection if collected or acquired prior to joining the Museum's staff.

3. Personal collections of Staff or Board members shall not be combined with the TBHC Collection except for purposes of exhibit at the Museum, coincidental lending to other institutions, or if such collections are accepted for accession into the Museum's collections.

4. Staff and Board members shall not collect or acquire items deaccessioned by the Museum except by purchase, such as at public auction or another open marketplace.

5. Museum staff is discouraged from bringing items from their personal collections into the museum for storage or other non-museum related purposes. Personal collections are allowed in the museum for: gift approval, special exhibitions, display, and study and/or office decoration.

6. Objects may be borrowed from any Trustee and those items will be catalogued as borrowed for exhibition or study. All items, while in the museum, are subject to the terms of the institutions fine arts insurance policy.

### **8.3 Monitoring, Compliance and Revisions**

1. Monitoring the implementation of these policies is an implied responsibility of the entire museum professional staff. Any major deviation from the Collections Management Policy without prior authorization will be reviewed by the appropriate staff and the Collections Committee and may result in restricted access to the collections if the collections are deemed to be at risk.

2. Compliance with the policies and procedures specified in this document is the responsibility of the Public Programs division. Exceptions to stated policies and procedures might be made at the discretion of the Saunders Curator of History and Collections Manager in consultation with members of the Programs division.

3. Revisions to the Collection Management Policy, proposed by the Programs division are reviewed by the Collections Committee and presented to the full Board of Trustees for final approval.

### **8.4 Public Disclosure**

1. Request for copies: The Collections Management Policy is available to prospective donors or other responsible persons upon request.

2. Requests for Collections Transactions: A list of collection materials acquired or disposed of in any given year is available upon request. All the facts pertaining to the acquisitions deaccession, and disposal of accessioned objects is documented in the permanent records of the museum.

## **IX. Insurance**

### **9.1 Permanent Collection:**

On Site: objects in the permanent collection are insured while on and off premises of the museum, (b) Objects included in a traveling exhibition shall be insured “wall –to-wall”, (c) outgoing loan objects will be insured by the borrower unless it is in the best interest of the museum to insure its own object(s). Insurance costs will be borne by the borrower in accordance with the museum’s Outgoing Loan Policy and procedures. The borrower assumes all costs incurred in order to determine the fair market value of the requested object(s).

## **9.2 Insurance Records:**

1. Insurance Records will be kept up-to-date by the Collections and Programs Division as well as copies filed in the Business Office.
2. Policy review will be undertaken on an annual basis prior to renewal date.

## **9.3 Appraisals**

Any staff member may not give appraisals to anyone outside the museum because of the possibility of an appearance of or actual conflict of interest. The staff may assist by identifying outside qualified appraisers, without endorsing any, and organizations and publications from which information on appraisers may be obtained.

## **X. Collections Care and Use**

### **10.1 Collections Care**

1. The museum undertakes the preservation and maintenance of its collections in accordance with professionally accepted standards.
2. Objects entering permanent storage areas, whether they are newly accessioned or returning from exhibition or outgoing loan must be inspected for condition changes and properly processed for storage according to museum practices and standards.

### **10.2 Conservation Treatment**

1. An object may be proposed for treatment (cleaning and/or stabilization) by the Saunders Foundation Curator of History or Collections Manager. The written preliminary proposal must include the type of treatment proposed and the justification for the proposal.
2. The Saunders Curator of History or Collections Manager will sign the condition report and written justification to indicate the joint understanding of the risks and benefits of a proposed treatment and joint acceptance of responsibility for the decision before treatment may begin. Responsibility for final treatment may be sought from the Collections Committee.
3. Budgetary funding is provided through the Board of Trustees adopted annual budget for a specified amount that may be used for conservation treatment. Collections Committee approval is needed for treatment cost above those provided in the annual budget.

4. Final Documentation of treatment report, the conservator upon completion of treatment will prepare costs associated with the treatment.
5. The Registrar maintains copies with the archived permanent accession file and makes notation to the permanent object record.

## **XI. Integrated Pest Management**

### **11.1 Insects and Mold**

The collections are particularly vulnerable to damage due to insects and/or mold. Infestation will be discouraged through adherence to strict object processing, facilities use, housekeeping and maintenance standards

Objects entering the museum will be confined to the museum's loading dock or level receiving area, until or unless they have been examined for pest infestation and sealed for transport to object processing. This includes temporary deposits, loan objects, objects brought in for public programs, potential donations and purchases.

**11.2 Temporary deposits** remaining on the premises for more than 48 hours will be closely inspected and vacuumed. If an infestation is confirmed or suspected, and the object will remain at the museum (e.g. acquisition), the object will be treated with nitrogen anoxia to ensure eradication of insect pests. Loan objects will not be treated without permission from the lender. Objects not treated will be isolated in the receiving area, away from permanent collection storage.

## **XII: Facility Use**

### **12.0 Facilities Use**

*[See Facility General Policies and Procedures for information regarding general facility use]*

### **12.1 Food and Beverage Use in the Museum**

1. No food items are permitted in closets, gallery storage, receiving or processing areas or in collection storage areas.
2. No food or beverages may be consumed in the galleries, or in any other area of the museum where collections are housed on either a temporary or permanent basis. Authorized eating locations are in the "café", employee break room, board meeting room, and specially designated areas used for special events.
3. Food service and its associated clean- up for special events and facility rentals are the responsibility of the special events staff and/or division hosting the event.

4. Service areas are required to be swept, vacuumed, and/or wet mopped immediately following events.
5. As a multi-use elevator, the freight elevator must be kept clean of any food matter. If a spill occurs or is noticed, it must be cleaned immediately.
6. The single-use food service elevator is for the sole use by the catering service lessee. Lessee is responsible for timely removal of waste and materials used in events and daily food service business.

## **12.2 Use of Living Plants and Flowers**

1. No living plants or flowers may enter the gallery spaces or collection storage area, map room, or library at any time.
2. Living plants and flowers may occasionally be used for special events at the museum, provided they are transported to and from the museum immediately before and after any event. Temporary storage for plants and flowers will be near the front entrance doors or food service area.

## **12.3 Facility Use Agreement**

Further restrictions are imposed on individuals or groups renting the facilities. See The Tampa Bay History Center Facility Use Agreement form and General Building Policies and Procedures.

Coordination with food service lessee is required for use of events room and other applicable areas. A signed Facility Use Agreement form should remain on file with Visitor Services and a copy provided to the Saunders Foundation Curator of History.

## **12.4 Housekeeping**

A regular cleaning schedule of the entire museum will be maintained. See Housekeeping Procedures List provided by the Facilities Manager.

Refuse Disposal: food and beverage refuse may only be disposed of in the kitchen garbage, the employee break room garbage, the board room garbage, or the garbage container in the café. Reducing the locations of food and beverage refuse will reduce the potential for insect infestations.

The appropriate Facilities Manager or Pest Control vendor on a monthly basis completes preventative spray application.

**12.5 Building Maintenance:** the structural integrity of the museum building will be surveyed regularly, and improvements necessary to discourage and/or prevent the entry of pests will be given a high priority.

**12.6 Pest Monitoring:** Insect traps—non-toxic, sticky, or pheromone insect traps may be maintained in strategic locations throughout the museum, and checked regularly by the Collections Manager or Facility Manager. Integrated Pest Management is the responsibility of the Program Division in conjunction with the Facility Manager. Monitoring is completed on a daily basis along with humidity readings and other tasks undertaken by the professional staff.

### **12.7 Treatment**

Objects discovered to have insect activity are first isolated and removed from the exhibition or collections storage space where they are located. Further detailed inspection of the areas immediately adjacent to the infested object should be done if possible; the insect should be identified in order to make informed decisions as to treatment and habitat modified to prevent another/further outbreaks.

Any pest that has been located should be placed in a plastic bag, dated and notated as to location of find. The Facilities Manager will accept the item.

The isolated object should be carefully cleaned and vacuumed. All insects, both live and dead, will be removed from the object and disposed of. The variable speed, hypostatically controlled vacuum with a mesh net on the attachment head/hose will be used to remove any frass/insects.

The museum uses Nitrogen Anoxia to treat objects both for reactive and preventive purposes. If an object has been infested or is likely to be infested, but no visual evidence presents itself, the Collections Manager and/or the Registrar uses the anoxic method to safely eradicate insects from the objects. The Registrar will construct an enclosure of appropriate size, facilitate the anoxic treatment, and store it either within collections storage or an isolated area.

Upon completion of the anoxic treatment, the Collections Manager and the Registrar will evaluate the effectiveness of the treatment and make notation to the permanent record. The evaluation will be presented to the Saunders Foundation Curator of History for disposition.

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## **Addendum: Forms**

## **Collections Policies and Procedures**

Approved by the Tampa Bay History Center Board of Trustees  
on April 17, 2013

[The forms section has not been included due to the significant number of pages.  
If you would like a copy of these forms, please contact Rodney Kite-Powell, Saunders  
Foundation Curator of History, and one will be gladly supplied.]