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# Lower Merion Historical Society Collections Management Policy

Adopted 1997 | Revised June 2024

Adapted from collections management policies by the Wayland Historical Society and the Beloit Historical Society.

## I. Mission Statement and Purpose of Policy

The Lower Merion Historical Society is dedicated to *Preserving Our Past for the Future*. This is accomplished by stewardship of local history, education of the community, preservation of historic resources, and outreach to promote awareness of the cultural heritage of the Township of Lower Merion and the Borough of Narberth.

The collections management policy regulates collections-related activities based on stewardship standards set forth by professional organizations and clarifies who is responsible for managing the collections. An effective collections management policy makes clear what a historical society does to care for, grow, and make accessible its collections to the public it serves. LMHS strives to maintain the highest legal, ethical, and professional standards as recommended by the American Alliance of Museums (AAM) and the American Association for State and Local History (AASLH). A collections management policy is a requirement of these standards.

## II. Organization

The Lower Merion Historical Society is administered by a Board of Directors who employ an administrative staff member to manage the Society's facilities, collections, and programs. The Board of Directors also appoints a Facilities Committee made up of board members. The Facilities Committee:

1. Recommends collections related policies and forms.
2. Develops the procedures by which the policies are implemented.
3. Reviews proposed acquisitions and approves accessions into the collections.
4. Reviews proposed deaccessions from the collections and recommends disposition and use of proceeds from the sale of collections.
5. Approves the loan form and terms of loans.
6. Acts as an advocate for the resources necessary to meet professional standards for the care and management of the collections.
7. Assists in the development of plans to improve collections care and access to collections.



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### **III. Scope of Collections**

The Lower Merion Historical Society collects objects, photographs, video, documents, manuscripts, and records that relate to the history of the Township of Lower Merion and the Borough of Narberth. The collections reflect the history of Lower Merion and Narberth's residents over time, or have a direct and important connection to a person or event in Lower Merion and Narberth's history.

### **IV. Acquisition Policy**

Acquisition is the means by which the Lower Merion Historical Society collects material(s) related to the Society's mission. Material(s) are acquired through gift, bequest, exchange, purchase, or conversion. The Society subscribes to a policy of selective acquisition. Authority to acquire material(s) for the Society resides with the Facilities Committee Chairperson.

#### **A. Acquisition Criteria**

1. Material(s) must have free and clear titles and must be offered without restriction.
2. Material(s) must be in stable physical condition and be able to withstand handling for research and exhibition. Exceptions will be made for objects of exceptional historical value.
3. Material(s) must contribute to the understanding and interpretation of the history of the Township of Lower Merion and/or the Borough of Narberth.
4. Material(s) must have a well-documented collection history that directly relates to the history of Lower Merion and/or Narberth.
5. Material(s) must not duplicate objects of equal condition or historical value in the Society's collection.
6. LMHS resources must be available to register, store, and preserve the material(s).
7. LMHS will not collect any material(s) that violate state or federal laws.

#### **B. Orphaned Collections or Conversion of Unclaimed or Old Loans**

Orphaned collections, sometimes referred to as objects found in the collection, are those collections with no catalog numbers (or numbers that cannot be cross-referenced to LMHS cataloging systems past or present) or any characteristics that might connect them to existing documentation. Orphaned items may derive from undocumented door stop donations; undocumented pending gifts; exhibit, special event, or education props; or staff or volunteer personal collections. With orphaned or found in the collections material(s), there is no evidence held by the LMHS that someone else owns these material(s). Unclaimed or old loans are those material(s) that is (are) accompanied by some evidence or documentation that a loan to the LMHS was intended by the owner.



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## **B. Orphaned Collections or Conversion of Unclaimed or Old Loans (continued)**

Orphaned and old loan collection items may be accessioned into the permanent collection if they meet the acquisition criteria. Orphaned material(s) must be recorded as found in the collection to make clear that the transfer of ownership is undocumented. Old loans must be recorded as “conversion” and must adhere to the guidelines set forth in Pennsylvania’s abandoned property statute §1301.1-28. An unclaimed or old loan may be converted if the bailment relationship is broken.

When considering the disposal of material(s) of unconfirmed ownership, the LMHS will consider factors such as the value, distinctiveness, history of exhibition, and proposed disposal method of the material(s) in question.

### **C. Temporary Custody**

Material(s) under consideration for acquisition may enter the LMHS only after a Temporary Custody Form has been completed. The LMHS will notify the owner of property deposited under a Temporary Custody Form concerning the Facilities Committee’s decision within 180 days of the receipt date. If the LMHS decides not to accept the material(s), the owner has 30 days from the date of notification to reclaim the material(s). If the Depositor or Owner fails to take possession of the material(s) upon request, or if no special arrangements have been made for the return of the material(s) and the LMHS’s efforts to contact the Depositor or Owner are unsuccessful, then the LMHS shall have the right, in its sole discretion, to either use the material(s) or place them in storage at Depositor’s sole risk and expense, to charge regular storage fees therefor and to have and enforce a lien for such fees. The material(s) will be so held by the LMHS for a period of two (2) years. If, after two (2) years, the material(s) have not been reclaimed, then, and in consideration of the expense of storing and safeguarding the material(s) during such period, the material(s) shall be deemed to be an unrestricted gift to the LMHS.

## **VI. Accession Policy**

Accession is the act of making an object, records, or collection of objects/records part of the permanent collection. Accession also refers to a collection of material(s) entered into the permanent collection at the same time. Acquisitions may only be approved for accession by the Facilities Committee.

Materials that do not need to be accessioned include newspaper articles, periodicals and magazines, supplemental information, research collection material, telephone books, and educational materials for hands-on use.



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## **V. Deaccession Policy**

Deaccessioning is the act of permanently removing material(s) from the collection. Deaccessioning is a management tool and an aspect of responsible growth and refinement of the collections, but is also one of the most controversial practices in museums. Deaccessioning presents legal and ethical considerations, which LMHS will endeavor to address with full transparency. Legal implications include past donor restrictions, tax implications, and clear ownership of deaccessioned objects. Ethical considerations include public expectations of curation in perpetuity and use of deaccession proceeds. Authority to deaccession from the LMHS collection rests with the Facilities Committee.

### **A. Deaccession Criteria**

Deaccession decisions should be of benefit to the LMHS and be in keeping with public-trust responsibilities. The following criteria will guide deaccession recommendations and decisions:

1. Inconsistent with the LMHS mission and scope of collections.
2. Condition renders the material(s) valueless for purposes of research, public education, and exhibition or presents hazardous conditions.
3. Duplicate or of inferior quality to another identical or similar item(s) in the LMHS collection.
4. Cannot be adequately stored or cared for.
5. Lacks authenticity or proper documentation, rendering it valueless for purposes of research, public education, and exhibition.
6. LMHS has clear and unrestricted title. (See Orphaned Collections and the Conversion of Unclaimed or Old Loans for policy regarding acquiring title to abandoned or undocumented property.)

LMHS will adhere to the standard minimum time period between accessioning and deaccessioning of three years. Once deaccessioned, accession numbers shall not be reused as these numbers are part of the collection's permanent records. LMHS shall also retain all documentation for deaccessioned collections as part of its records. Missing or stolen material(s) shall not be deaccessioned from the collection.

LMHS may, but is not required to, notify a donor or the donor's heirs about deaccessions. If the deaccession is of high monetary value or the proposed methods of disposal has the potential to cause distress to a donor or donor's heirs, the Board of Directors may decide to notify the donor or donor's heirs.



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## **B. Methods of Disposal and Use of Deaccession Proceeds**

Disposal is the process of getting rid of collection material(s) that has (have) been deaccessioned. Deaccessioned material(s) will be disposed of by one of the following methods (the disposal methods are ranked in order of priority, 1 being the most desired and 3 being the least):

1. Donate, exchange, or transfer to another museum or educational institution.
2. Sell deaccessioned material(s) to another institution or at public auction. In the event of such sale, to avoid the appearance of conflict of interest, LMHS board members, staff, and volunteers are not eligible to bid on deaccessioned objects.
3. Destruction or disposal.

Proceeds realized from the sale of deaccessioned material(s) will be placed in the LMHS Collections Care Fund and may only be used for the purchase of new acquisitions or the direct care of collections.

## **C. Statement on Direct Care of Collections**

The Lower Merion Historical Society adheres to the ethical principles and definition of direct care established by the American Alliance of Museums as well as access and interpretation as stated by American Association for State and Local History in their *Statement of Standards and Ethics* and their *Valuing History Collections* paper. The Society will take actions that invest in existing collections by enhancing their life, usefulness, and quality and thereby ensure they will continue to benefit the public.

Direct care *does* include the following activities:

1. Conservation services (limited to treatment, stabilization, and restoration by a conservation professional).
2. Environmental monitoring equipment and supplies (limited to dataloggers, light meters, UV filters and bulbs for storage and exhibit lighting, and integrated pest management supplies).
3. Archival supplies (limited to supplies used for the storage of collections).
4. Storage hardware (cabinetry, shelving, etc.).
5. Collections care investments identified through a conservation assessment and/or plan.
6. Collections care training for staff and volunteers.
7. Maintenance of and upgrades to the PastPerfect collections management software system.
8. Cost-share or match on grant proposals that address these criteria.



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### **C. Statement on Direct Care of Collections (continued)**

Direct care *does not* include the following activities:

1. Staff salaries and intern stipends for individuals whose responsibilities include collections care and management.
2. Facilities maintenance, upgrades, security, and fire suppression systems that impact the preservation of and accessibility to collections (includes furnace, roof repair, etc.).
3. Institution-wide pest management contracts.
4. Exhibition casework, mounts, or lighting fixtures.
5. Computer hardware related to PastPerfect collections management software system.
6. Hardware related to digitization (digital cameras, scanners, etc.).
7. Fund-raising and grant-writing expenditures related to collections care and management.

### **VI. Collections Stewardship**

Collections stewardship is the careful, sound, and responsible management of that which is entrusted to a museum's care. To fulfill its collections stewardship responsibilities the LMHS strives to:

1. Own collections that are appropriate to its mission.
2. Adhere to legal and ethical standards regarding care and management of its collections.
3. Strategically plan for the use and development of its collections.
4. Provide public access to its collections.

#### **A. Physical and Intellectual Accessibility**

Physical and intellectual accessibility are vital to ensuring LMHS is able to fulfill its collections stewardship responsibilities. Physical accessibility entails archival quality storage equipment, environmental controls, and use of archival materials to house and organize collections.

Intellectual accessibility is achieved through maintenance of proper documentation, cataloging, use of a collections management software system, and digitization.

#### **B. Preservation Needs Assessment**

In May 2024 LMHS hosted students from the Winterthur Program at the University of Delaware for a preservation needs assessment. Guided by a professional conservator from the Conservation Center for Art and Historic Artifacts, the students completed a comprehensive evaluation of the exterior and interior of the Society's building, assessed collection conditions and storage, and evaluated the Society's collections care policies and procedures.

The Facilities Committee will consult the recommendations from the needs assessment to improve the care of the collections and ensure their long-term preservation.



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### **C. Inventory**

LMHS has renewed efforts to properly document its collections, and this begins with updated object inventories. An accurate inventory is important to know and understand what is in the collection, where it is located, why it is a part of the collection, and to detect issues in order to resolve them in a timely fashion.

It will be the ongoing project of volunteers and interns to document the collections and update them over time.

### **VII. Collections Access**

The Lower Merion Historical Society owns, curates, and provides access to collections and records related to the history of the Township of Lower Merion and the Borough of Narberth. This policy covers access to and use of collections and records owned by LMHS. LMHS endeavors to provide public access unless there is a federal law, a state statute, a LMHS need, or a privacy concern that would restrict access. Access to and use of collections and/or information may be restricted as a result of copyright, donor restrictions, or condition (some items may be too fragile to handle).

LMHS members and members of the public are allowed physical and intellectual access to collections and primary and secondary records. All users must adhere to the access guidelines. Commercial use of photographs or documents require contractual agreements.

#### **A. Research Requests**

Research requests can be made to LMHS in person and online. Requests for research can be emailed to [research@lowermerionhistory.org](mailto:research@lowermerionhistory.org). It is best to email LMHS in advance to request materials.

Because LMHS relies on part-time staff to assist researchers, the Society is open by appointment. Requests for appointments can be emailed to [info@lowermerionhistory.org](mailto:info@lowermerionhistory.org). LMHS also hosts open hours for research on Wednesday evenings from 7 to 9 PM and select Saturdays from 2 to 4 PM.

#### **B. Access Guidelines**

Because collections are frequently fragile, irreplaceable, and often require special handling, access guidelines are necessary to ensure the preservation and safety of all LMHS collections. Rules and access guidelines will be provided to each patron. Specific guidelines can be updated by the Facilities Committee as required by changing needs of the collection.



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### **C. Physical Access**

Building restrictions limit physical access to the Society for patrons unable to navigate stairs. The Society endeavors to provide equitable access to all, and will make best efforts towards accommodations for those who may need digitized access to materials.

### **D. Copyright Restrictions**

The copyright law of the United States (Title 17, U.S. Code) governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish photocopies or other reproductions. One of these specified conditions is that the photocopy or reproduction is not to be “used for any purpose other than private study, scholarship, or research.” If a researcher makes a request for, or later uses a photocopy or reproduction for purposes in excess of this “fair use” that researcher may be liable for copyright infringement and will hold the LMHS harmless.

The LMHS does not claim exclusive ownership of copyrights and has not determined copyright status for many materials in its collections.

The LMHS is not responsible for determining copyright status or securing copyright permission.

The LMHS reserves the right to refuse a request for copies or scans if these activities would risk damage to the item(s). In addition, the LMHS reserves the right to refuse a duplication order if the order may involve violation of copyright law.

Images on the LMHS website may be printed or downloaded by individuals, schools or libraries for personal use, study, research and classroom teaching without permission.

### **E. Fees**

The LMHS charges a \$25 per hour fee for research services. Because LMHS is a non-profit organization largely run by volunteers, the LMHS asks patrons to make donations in order to support its mission.

### **VIII. Loan Policy**

The LMHS facilitates outgoing and incoming loans to disseminate knowledge, share information, and broaden public access. The LMHS makes loans to recognized museums or educational, cultural, or scientific institutions. The LMHS does not make outgoing loans to individuals.

Outgoing and incoming loans should benefit public, not private interests. The LMHS will not engage in permanent loans. Permanent loans are loans of indefinite duration. By definition, a loan is a temporary arrangement of finite duration.





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## **A. Outgoing Loans**

Loan requests must be received in writing at least three (3) months prior to the intended arrival at the loan venue and should be received from an individual authorized to request loans on behalf of their institution. Formal loan requests must include the intended purpose, location, and proposed dates. If the loan is for exhibition purposes, an exhibit prospectus, standard facility report, and certificate of insurance for all venues may be required.

The Facilities Committee approves the loan form and terms. Collections requested for loan must be suitable to the reason for the loan and able to withstand packing, shipping, handling, and purposes for which the loan is made. Availability of objects for loan is subject to the condition of the object, copyright laws, and cultural restrictions. Special permits may be required and are the responsibility of the borrowing institution. The condition of all artifacts will be photographically documented before pick up and after return of the loan. Each borrower will agree to the loan conditions prior to a loan being approved.

## **B. Incoming Loans**

The LMHS takes on a liability when agreeing to the conditions of an incoming loan request. For this reason, incoming loans should demonstrate a clear connection between the borrowed object(s) and the LMHS mission. Incoming loans from private collectors or for profit entities can present conflicts of interest and must be carefully assessed.

## **C. Incoming Loan Conditions**

1. The LMHS may use the lending institution's loan form if appropriate.
2. The LMHS will only borrow objects for which the lender has clear title. It's the lender's responsibility to inform LMHS of any changes of ownership during the tenure of the loan.
3. The LMHS will adhere to the conditions set forth by the lender, but will be transparent about collection stewardship limitations.

In lieu of lender loan conditions or a loan agreement, the LMHS will endeavor to adhere to the conditions outlined in Outgoing Loan Conditions when acting as the borrower, but will be transparent about collection stewardship limitations.

## **IX. Standards of Conduct and Ethics**

The Lower Merion Historical Society endorses the Code of Ethics established by the American Association of State and Local History. The Board of Directors, staff, and volunteers working with the collection are expected to abide by those standards. Members of the Board of Directors, staff, and volunteers have an obligation to put the Lower Merion Historical Society's interests with regard to the collections above their personal interests.