

2024



MoHB

Museum of History *Benicia*

COLLECTIONS POLICY

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Introduction

The Museum of History *Benicia* (MoHB) is committed to applying the best standards in museum practice toward the management, conservation, and care of artifacts held in its permanent collection. Museum collections include furniture, industrial machinery, textiles, archeological and natural history collections, ephemera, and library materials, including books, reference materials, photographs, and multi-media objects. The museum is responsible for articulating the scope and substance of the museum's collection philosophy.

Vision Statement

The History of California is written in the story of Benicia.

Mission Statement

The Mission of the Benicia Historical Museum is to engage the community and the greater public in the evolving history of Benicia and its contributions to the development of our state and country. Dedicated to our children and future generations, our work fosters understanding, connectivity, identity, and pride. The museum complex is at the heart of Benicia's historic preservation and heritage promotion programs through its exhibits, educational outreach, events, and activities and online archives.

Purpose of the Collections Management Policy

To fulfill the mission of MoHB, the museum collects two and three-dimensional artifacts and associated information related to both the local history of the City of Benicia, and the overarching history of the State of California. The Museum actively engages in the preservation and conservation of its collections for the express benefit of current and future generations through the continued implementation of an active collections care and management program. All the museum's aforementioned activities are performed under the overarching institutional mission of the Museum. This document outlines the role of developing, maintaining, and managing the Benicia Historical Museum's collection and documentation for the purpose of fulfilling its mission. The policies and practices presented in this document reflect not only the mission of MoHB but also the commonly accepted professional standards and practices of the various disciplines,

synthesized as best practices. The foremost responsibility of the collections staff is to ensure that acquired artifacts are consistent with the mission and goals of the Museum of History *Benicia*, and that the Museum's collections and documentation are properly preserved. This responsibility is of paramount importance because it is by interpretation of those objects and associated data that we can communicate the history of the city of Benicia and the State of California.

The Collections Management Policy (the Policy), is intended to document the policies that guide the development and care of the museum's collection and is done in a way that is consistent with the mission of the Museum and guided by professional best practices.

Through the Collections Management Policy, the Museum ensures that:

1. All collections are accounted for by a spot inventory every year and a comprehensive inventory every two years.
2. The information gathered from either inventory process will be recorded in the management database.
3. The collections are protected, secure, cared for, and preserved.
4. Acquisition, deaccessioning, and loans are conducted in a manner that reaffirms the Museum's mission, complies with applicable law, and reflects the institution's commitment to ethical best practices.

Access to the Permanent Collection

It is fundamental to the museum's mission to provide access to the Museum's collection and promote appreciation of its significance. Among the primary means for achieving this goal are the presentation of exhibits of its own work and those borrowed from other individuals or institutions. The museum shall provide additional access to its collections through study and loans to other institutions. The museum will continue to support scholarly research and investigation to advance the understanding of the collection as well as contribute to both academic and public understanding.

Providing public access to the MoHB collection, in controlled situations, is an important part of the mission of the Museum. The Museum of History *Benicia* is committed to bringing to the public, information culled from its documents, photographs, artifacts, and oral histories by presenting public programs, mounting exhibits, and publishing newsletters, pamphlets, and guides to the collection whenever possible.

1. Inventories, relevant files, and the assistance of a staff member or trained volunteer shall be available to members of the public who are legitimate researchers with legitimate justification. Such researchers must work with the Museum staff to establish a mutually convenient date and time for research appointments.
2. The Museum may limit the use of fragile, unusually valuable, or difficult-to-access materials.
3. Hours of operation may be designated hours or by appointment, depending on the availability of staff or trained volunteers.
4. A fee is charged for research work done by staff to meet requests or for copies, images, or other reproduction costs.
5. Photographic and xerographic reproductions: A request for copies must go through the Collections office. Copies may not be used "for any purpose other than private study, scholarship, or research." (US Copyright Law, Title 17). Reproduction by the institution in no way transfers either copyright or property rights, nor does it constitute permission to publish or display materials. In some cases, the Museum may refuse to allow copies to be made because of the physical condition of materials, restrictions imposed by the donor, copyright law, or right-to-privacy statutes.
6. The Benicia Historical Museum may refuse access to an individual researcher who has demonstrated such carelessness or deliberate destructiveness as to endanger the safety of the materials.
7. Access to collections records is controlled by the Curator. Sensitive information such as site and locality information, donor names, valuation, and cultural information may be restricted by the Curator.
8. The Curator manages licensing and use agreements for all MoHB-owned images, digital images, documents, or printed materials. A record of authorized use of Museum collections is maintained as part of the catalog file.
9. Access to individual collections is at the discretion of the Curator. Records of all researchers at the Museum are maintained by the curatorial department.
10. For public relations and media, access will be controlled by the Curator in conjunction with their Director.

Description of the Permanent Collection

The Museum of History *Benicia* collects California artifacts related to the telling of the story of the City of Benicia and its place within the greater history of California and the

United States. These items include photographs, natural history collections, archeological collections pertaining to early California, California Amerindians, textiles, Benicia Arsenal artifacts including uniforms, militaria, photographs, and ephemera, books directly related to Benicia history, history of the State of California, military history as it pertains to California, and specifically Benicia Arsenal, and items related to local industrial history and manufacturing.

The Museum of History *Benicia* categorizes its collections into several types based on curatorial knowledge and institutional resources for storage, preservation, research, and exhibition development.

Permanent Collections are accessioned items and make up the greatest portion of the Museums' artifacts on public display. The Education Collection consists of non-accessioned items, or deaccessioned items, primarily used for programs and exhibits. Various specialized collections, such as the archeological and natural history collections which have unique storage and management requirements.

The items are predominantly of local historical significance and are used to support the mission of the Museum and enhance visitor experience. Objects classified as Permanent Collections receive the highest standard of care and fullest documentation. Permanent Collections are accessioned and cataloged with a fully maintained record of exhibition and research. Permanent Collections items may be used in exhibitions, for outgoing loans, and research depending on their reported physical condition and requirements.

Governance

The Museum houses and maintains a documented collection of artifacts and archival materials that are preserved and managed for exhibition, programming, education, and research. Because the Museum's collection is held in the public trust, every reasonable attempt is made to keep materials accessible while still maintaining the highest ethical standards of preservation and interpretation of the collection. The Museum assumes complete and unrestricted title to items accessioned into the permanent collection, the care and safety of the collections are the responsibility of the Museum. The Museum adheres to American Alliance of Museum standards.

The Board of Directors of the Museum of History *Benicia* holds the ultimate fiduciary responsibility for the Museum and for the protection and nurturing of its various assets, including the collection and related documentation, the physical plant as outlined in the lease agreement with the City of Benicia, the financial assets of the institution, and the staff. The Board is obliged to develop and define the purposes and related policies of

the Museum, provide oversight, and ensure that all the Museum's assists support the Museum's mission and are properly and effectively used for public purposes.

The Executive Director carries out the policies established by the Museum's Board and oversees the day-to-day operations of the Museum with the support of the Museum's staff and volunteers.

The Curator is authorized to recommend acquisitions. Changes, additions, and the removal of objects from the Museum's collections. Such recommendations are referred to the Executive Director and any further actions taken are done so in accordance with accepted collections policies.

Acquisitions

Items shall be acquired only when the Museum has determined to the best of its ability that they have been collected, exported, and imported in full compliance with the laws and regulations of the country or countries of origin, of the federal government of the United States, and of individual states within the United States. Every reasonable effort will be made to ensure that these conditions are met and that the title to the artifact or specimen may properly be transferred to the Museum.

Legal Considerations

No employee, Board member, or Volunteer of the Museum of History *Benicia* will provide appraisals for any purpose, including the establishment of the tax-deductible value of gifts offered to the Museum of History *Benicia*, nor shall they identify or otherwise authenticate for persons or agencies items under circumstances that could engage or benefit illegal, unethical, or irresponsible traffic in such materials, or where there is reason to believe such identification will be used primarily for commercial purposes. If the Museum should inadvertently acquire an object(s) that is later determined to have been exported or recovered in violation of the Museum's acquisition policy, the Museum will promptly return the object(s) to the owner of transfer to the government of the country of origin, or to another appropriate recipient.

The Museum of History *Benicia* shall conform its collection practices regarding long-term loans according to California Civil Code 1899-1899.11 regarding Loans to Museums for indefinite or Long Terms.

The title of all acquisitions must be unencumbered. The Museum of History *Benicia* will not accept objects upon which restrictions are placed, and that would prevent effective research examination, normal exhibition use, loan, or disposal in accordance with this

document. The Museum will not accept objects under conditions that would require their permanent or long-term exhibition, or that the collection of which they may form only a part of, must be kept together permanently and/or displayed only as a self-contained collection. In rare cases, exceptions to this rule may be made for particularly significant or well-documented items where restrictions imposed by the donor are in accordance with technical and scholarly needs such as the requirement that groups of objects are not be deaccessioned except to another public institution with comparable deaccession policies as those to the Museum of History *Benicia*.

The Museum of History *Benicia* will also refuse to acquire objects in any case where it has cause to believe that the circumstances of their collection involved the recent unscientific or intentional destruction of sites or monuments, or where local, state, or federal laws or international treaties were violated.

These standards will also be considered in determining whether to accept loans for exhibition or other purposes. Reasonable efforts will be made to ensure that these conditions are met, that the title to the object(s) may be properly transferred to the Museum and that is the responsibility of the Museum to remain up to date on the changing laws and regulations concerning object collecting, ownership, and movement across political boundaries. The Museum will cooperate with authorities of the United States and other countries in legal action against those committing improprieties.

Accessioning

The Museum of History *Benicia* defined accessioning as the formal process used to legally accept and record an artifact or archival material as a collection item. It involves the creation of an immediate and permanent record using a control number or other unique identifier for artifacts or materials added to the permanent collection from the same source at the time, and for which the institution accepts custody, right, or title.

The Museum accepts for accession, only items of historical or artistic value for which it is able to provide storage, protection, and preservation under conditions that insure availability for exhibition and study. Examples Include:

1. Benicia Arsenal artifacts or items related to those who served and/or worked at the arsenal location from 1851 through the closure of the Arsenal in 1964, including uniforms and equipment, photographs, ephemera, books, and periodicals.
2. Benicia as it is related to Solano County and the development of the county seat.

3. Benicia as it is related to the greater telling of the story of the State of California with artifacts related to early California, registered cattle brands, Gold Rush material culture, and archeological collections.
4. Transportation, the railroad, Pony Express, ferries, cargo, port of entry, Carquinez Strait, photographs, food service pieces, lanterns, maps, and charts.
5. The people of Benicia focusing on two- and three-dimensional artifacts related to their local schools, churches, fraternal organizations, and everyday lives. Personal material culture, clothing, and textiles.
6. Benicia industries including signs, patterns, machines, tools, documents, medical and dental tools and equipment.
7. Civil Government-related books, maps, contracts, bills of sale, photographs, signs, public safety materials, tools, and equipment, and political campaign materials and ephemera.
8. Historic structure and preservation-related collections including, furniture, decorative arts, photographs, and household industry.
9. Archeological collections related to early California, the von Pfister store site, Benicia Barracks and Arsenal, and native California Amerindians.
10. Natural History Collections related to the ecology of the Carquinez Strait, the Sacramento River Delta, and the locations inhabited by the local Native tribes.

Criteria for Acquisition to the Permanent Collection

All acquisitions are unconditional. The Museum of History *Benicia* cannot accept objects on which the owner has placed restrictions that would prevent effective research examination, normal exhibition use, loan, or disposal in accordance with this policy.

1. The object(s) must be consistent with the mission of the Benicia Historical Museum
2. The object(s) enhance collection categories that lack current representation
3. The object(s) should contribute to illuminating or realizing any of the Museum's interpretive strategies according to the Interpretive Assessment Criteria.
4. The object(s) condition must be stable enough for interpretive use.
5. The object(s) must be donated without imposing restrictions regarding the specific use or exhibition of the object(s)
6. The object(s) should not be encumbered by intellectual property rights.
7. The object(s) should not be made of/or contain hazardous materials.
8. The donor/seller/lender must have a clean title to the object(s)

Interpretive Assessment Criteria

1. The object(s) should contribute strongly to illuminating any of the established or future narratives or provide a significant historical context to current or prospective narratives.
2. The object(s) improve or fill in a blank in the Museum's telling of the story of Benicia's History and that of the way in which it relates to the history of the State of California.
3. Do the object(s) or materials(s) document or represent a unique or historically important example of industrial manufacturing, home or civic engagement, or the development of Benicia or the State of California?

Care and Preservation

The Museum is committed to the preservation of all its collections through:

1. An active preventative conservation program
2. The preservation, restoration, and treatment of specific objects employing conservation principles.
3. The reasonable exhibition, movement, cleaning, and handling practices.
4. The provision of quality storage environments
5. Complete documentation of object condition and treatment. Object treatments shall follow the Institute for Conservation Code of Ethics and Standards of Practice to the degree practical.

The object(s) being considered for acquisition must be in a state of preservation considered to be appropriate.

1. The amount of original or desired period material extant and the condition of the material should be consistent with the object(s) intended use.
2. The object(s) must be relevant to the Museum's mission.
3. The object(s) must meet collection and interpretive planning needs.

Collections Storage

Approximately 25% of the Museum's collection is on exhibit at any one time which leaves approximately 75% of the collection in storage. All objects must be stored in an orderly manner in a secure, stable environment. The bulk of the storage is in building 7.

It is the Museum's policy to provide indoor storage space for all accessioned items whenever practical. The Curator is responsible for the maintenance of storage location(s)

and conditions and for the physical accountability of the collections in storage. All objects can be located accurately and promptly using location systems maintained by the Curator and his/her volunteers.

Special Considerations

Materials with less than complete supporting data may be accepted for accession if the Curator is reasonably certain of their origin, and content, and if the item(s) history can be established through scholarly research.

Found In Collections (FIC) Items

Undocumented objects found in the collection are those that have no accession number and no record of the object being accessioned or why they are in the Museum.

Ownership of the undocumented objects cannot be assumed, and they cannot be disposed of or accessioned into the permanent collection. These objects are considered abandoned property and California law regarding museum abandoned property and old loans must be followed to gain clear title. Once a clear title is established, the object(s) undergoes acquisition review.

Deaccessioning

The Curator will examine the object(s) record(s) to determine whether the Museum has legal title and will review donor information with appropriate staff. If the proposed deaccession candidate was a gift, the files will be examined for any information on the donor or the gift(s) that may influence the deaccession decision. In consultation with other appropriate staff, the Curator will complete the deaccession form, taking care to include the following:

1. A photograph of the object(s)
2. The source of the object(s) if known
3. The criteria used to justify the object(s) removal from the collection
4. Any restrictions associated with the object(s)
5. The recommended means of transfer or disposal of the object.

General Principles of Deaccessioning

The Museum of History *Benicia* acts as a custodian of artifacts and objects for the broader benefit of society. This may require permanent removal of artifacts from the Museum and may occasionally involve physical discard. Transfers will preferably be made only to cultural, technical, or educational institutions.

Deaccessioning provides a mechanism for MoHB to improve its collections, both in quality and quantity following the collection strategies that support its mission. Given that museum collections continually undergo change, items which no longer support the mission must occasionally be removed from collections. This policy governs all types of accessioned objects as defined in the acquisition policy and is written in accordance with best practices. In considering deaccession, the Museum must be aware of its role as trustee of the collections on behalf of the public. The deaccession process shall be cautious, deliberate, and scrupulous.

The term deaccession means that an item is removed from the collection and considered for disposal by sale, exchange, or other means. Any deaccession of an object should be solely for the advancement of the Museum's mission. The criteria for determining whether an object should be deaccessioned include but are not limited to the criteria listed below.

Deaccessions must comply with the following federal and state regulations.

1. Donated objects must have been in the museum collections for a minimum of two years before they can be deaccessioned – U.S. Tax Reform Act of 1984; IRS regulation
2. An object held in the collection that lacks an accession number or record, and that might reasonably be assumed to have been intended as a gift to the museum, may be deaccessioned in the same manner as any other accessioned object, but only after complying with California Civil Code Section 1899-1899.11. Unclaimed property laws beginning with Section 1500 of the Code of Civil Procedure may apply.

Deaccession Criteria

1. The object does not further the mission of the Benicia Historical Museum or its collection strategies.
2. The object is redundant and is likewise not necessary for research or study.
3. The object is of lesser quality than another of the same type already in the collection or about to be acquired.
4. The object lacks physical integrity
5. The object fails to retain identity, authenticity, or adequate documentation.
6. The object has been documented as stolen

7. The Museum is unable to provide adequate storage to properly preserve the object, or continued storage of the object jeopardizes other objects or places undue hardship on the Museum.

Procedures for Deaccessioning

The Curator initiates the deaccession process by completing a Deaccession Record. For material of potentially significant value, the Curator will obtain at least one evaluation or appraisal. The Curator verifies ownership. For FIC in the accession register, the Curator will follow the guidelines set forth in California Property Law, for establishing title prior to deaccession.

A staff-level deaccession committee will be convened by the Curator as needed to review proposed deaccessions and make recommendations.

The Director is authorized to approve the deaccessions of objects and collections with values less than \$2,000.

For objects or collections with a potential value greater than \$2,000, the Board of Directors must approve the deaccession.

Methods of Disposal

The preferred method of disposal is to sell, trade, or donate that deaccessioned item to another non-profit institution so that the item in question can remain in the public domain. Deaccessioned objects may also be sold at public auction/sale or may be transferred to the Education Collection. In the case of infestation, extreme disintegration, or an item(s) in extremely poor condition an item may need to be disposed of by physical destruction.

1. Transfer to the Education Collection or to another MoHB department for use as an exhibit prop, first-person interpretation tool, or for use in hands-on programming.
2. Donation to, or in exchange with another education non-profit entity. If necessary, a third party without connection to the Museum of History *Benicia* or the exchange recipient organization will be used to help establish equitable exchange value.
3. Destruction of material damaged beyond repair or salvage, or material of a sensitive nature or hazardous material. Destruction will be appropriate for the material. Adhere to all legal requirements of disposal and be thorough so that material is not appropriated by others.

4. Sale at public auction or in the public marketplace. No private sales will be authorized. The Curator and Director will consult on the sale of all deaccessioned material to minimize any negative consequences to the Museum.
5. Material leaving the public domain will have all MoHB identifying marks removed or defaced prior to the item(s) transfer/sale.

Approved methods of disposal

1. **Gifts** – gifts of materials to an appropriate technical, educational, or other cultural institution that may be deemed in the best interest of the Museum.
2. **Exchanges** – The formal reciprocal transfer of material between two or more institutions often serves to advance research, education, or exhibition programs. Such exchange may increase the probability of preserving materials for the future. There shall be no trade of materials or artifacts to employees, volunteers, Board of Directors members, or their representatives.
3. **Sales** – If certain materials of artifacts are no longer needed for research and exhibition purposes by the Benicia Historical Museum, and with the proper approval, this property may be sold subject to the following guidelines:
 - a. **Goals of Sale** – Recognizing the responsibility for preserving Benicia’s heritage, the Director is authorized to complete arrangements for the sale to a selected bidder who appears most likely to provide the best care and make the most appropriate research, educational, or exhibit use of the material.
 - b. **Ethics of Sale** – There shall be no sales of material to employees, volunteers, Board of Directors, or their representatives, unless at a public auction/sale.
 - c. **Public sales and auctions** – Sales to the public will be advertised as widely as possible. Material leaving the public domain will have all MoHB identifying marks removed or defaced prior to the item(s) transfer/sale.
 - d. **Application of proceeds** – All funds received from the sale of accessioned objects/artifacts, net of selling costs shall be allocated to collections purchase and conservation programs.
 - e. **Museum Store** – No artifacts will be sold by the Museum store except books, periodicals, or other items considered in excess by the Library and Archives collection. Funds from the sales of deaccessioned items shall be allocated to the Library and Archives collection for care and acquisition. Only the sales of unaccessioned items shall be used for the Library and

Archives general operating expenses. Material leaving the public domain will have all MoHB identifying marks removed or defaced prior to the item(s) transfer/sale.

Approval Authority

The purchase, sale, or exchange of materials will require approval by the Executive Committee if the appraised value of the item(s) be considered exceeds \$2,000.

While the Board of Directors bears final responsibility for the collection, including the acquisition and disposal process, the Museum staff and their associates are best qualified to assess the pertinence of an object to the Museum's collection or the Museum's programs. Only for clear and compelling reason should an object be deaccessioned against the advice of the Curator/Director

Records of Disposal

A permanent record of all objects subject to deaccession shall be maintained and shall include:

1. Condition and date of transaction
2. Name and location of institution, organization, or person(s) to which the object(s) was transferred.
3. Description and photograph of each object covered by the deaccession action.
4. Marking of the record to indicate the date and disposition of the object, the authority for the action, and reference to the file containing the record of the transaction.

A list of all deaccessioned materials taken from the Permanent Collections within the previous seven years shall be kept current by the Curator and may be distributed in response to any reasonable inquiry. All records relating to deaccessioned objects will be marked deaccessioned and retained.

Loan Policy

The Museum of History *Benicia* may lend artifacts and other materials from its collections for exhibit or research purposes to any corporation, institution, or organization formed or carried on for educational or technical purposes, which will provide adequate care and security for the material. No loans will be made directly to

individuals, and all loans must be approved by the Curator and/or Director as appropriate.

The Museum of History *Benicia* is the guardian of irreplaceable objects which are of both historical and cultural significance. In order to further the Museum's mission, the Museum may choose to lend objects from its collections to appropriate institutions or agencies. Certain restraints will be placed upon external use of collections so as to ensure the safety and integrity of the objects.

Objects in the collection, if suitable for loan, may be made available to accredited institutions or those other education-based agencies or institutions that meet the Museum's standards of display, security, and environment. All loans from MoHB are to be made for the purposes of exhibition, conservation, research, or education. Objects shall not be loaned for functional use. The borrowing agency's/institution's stated purpose, its adequacy for security, environmental controls, and its ability to insure the loan door-to-door for the full stated value shall be the primary factors in determining whether the loan request is approved. The following will be applied to all outgoing loans:

1. The Museum of History *Benicia* collections staff and/or Director, where/when appropriate shall see to the completion of all forms and their filing, set insurance values for the object(s) being loaned, prepare a condition report for the object(s) and all materials recorded and placed in the appropriate file.
2. MoHB staff will supervise the packing and transportation of any outgoing loans.
3. Costs for outgoing loans shall be borne by the borrowing institution.
4. The loan is documented by the Museum's loan form and signed by both parties. All other related documents such as condition reports and correspondence will be filed with the loan.
5. The borrower will take precautions to protect the loan from damage, destruction, loss, or other alteration from the time of receipt. The Museum will establish a value for the loan and insurance coverage and the borrower will provide proof of coverage.
6. The Museum of History *Benicia* will hold the borrower liable for any loss to the loan or damage to the object(s) during the period of the loan.
7. The borrower will not surrender the loan to anyone other than MoHB or its designated agents.
8. The Museum of History *Benicia* shall have the right to enter the premises on which the borrowed property is located to inspect the property. Inspections may

be made during normal business hours, or in the event that the borrowed property is used outside normal business hours, then during the hours the borrowed property is being used.

9. Loan agreements are governed by the Laws of the State of California pertaining to contracts. The following additional stipulations apply, but are not limited to:
 - a. The borrower shall not loan objects to another individual or institution without prior written consent from the Museum of History *Benicia*.
 - b. Objects shall be restricted from unauthorized access by the placement of barriers, installation in locked exhibit cases, and/or by the immediate monitoring of security personnel.
 - c. Objects shall be housed in areas away from smoking, direct sunlight, hot light sources, ventilation, or heating ducts, appliances, cold windows, water pipes, and exterior walls where condensation is likely. Light, temperature, and humidity must be adjusted, to levels in the loan agreement, if so bound by the needs of the object(s).
 - d. Objects will be loaned only if their conditions permit reasonable handling during packing, shipping, and installation. The Museum staff will determine the condition of the object(s).
 - e. Written approval is required before objects may be cleaned, repaired, retouched, or altered in any way unless specifically stated otherwise in the loan agreement.
 - f. The Museum of History *Benicia* reserves the right to inspect loaned objects periodically and to make reasonable requests for condition reports to be done for the object(s), recall loaned objects(s), or replace it with another item if necessary for the purposes of exhibition, conservation, or security. Loans may be terminated if damages occur.

Loan Conditions

All loans shall be subject to the following regulations, and no loans shall be made where these conditions cannot be met. Conditions are laid out more fully in the loan agreement.

1. Borrower must insure the object(s) to the full amount specified by the Museum of History *Benicia* in a door-to-door fashion specified with the best available insurance coverage.
2. Borrower must arrange and pay for shipping in both directions, by methods approved by MoHB.

3. Material placed on public exhibition must be locked or otherwise secure cases, or, when large objects are involved, so displayed as to provide maximum security.
4. Only adequately trained personnel shall be permitted to handle, move, or pack objects.
5. No loaned object(s) may be altered, embellished, or dismantled in any way.
6. No borrowed objects may be used for any commercial purposes whatsoever without prior written permission from the Museum of History *Benicia*.
7. No borrowed object(s) may be further loaned by the borrower or otherwise transferred without written permission from MoHB.
8. Packing for return shipping must be in the same manner as the original packing.
9. Borrower may be required to pay for packing at the Museum of History *Benicia* by methods and personnel chosen or approved by the Museum.
10. The Museum of History *Benicia* may require that loans be accompanied by a staff member, both outgoing and incoming, and that unpacking, mounting, dismounting, and re-packing be done under the supervision of a staff member of the Museum of History *Benicia* at the borrower's expense
11. Appropriate forms shall prescribe the procedure and conditions for outgoing loans. A complete record of outgoing loans shall be maintained.

Incoming Loans

The Museum of History *Benicia* may borrow objects from other institutions and private collections and apply standards of care and display to those objects in a manner consistent with its own collections, as required by contract.

1. Incoming loans will be made for the purposes of research, exhibit, education, examination, identification, or reproduction. Loans will not be made for storage or for the promise of future donations.
2. The Museum shall adhere to accepted professional standards or practices as outlined by the AAM. Loan agreements must have a defined and specific duration not to exceed two years. If agreed upon by both parties, loan agreements may be renewed. MoHB does not provide long or short-term storage services. All loans to the Museum will be for immediate exhibition, program, or research needs.
3. Individual loans for exhibition are initiated by MoHB staff if the following criteria can be met:
 - a. The object(s) provenance is understood and appropriate for its intended use.
 - b. Rights and title of ownership are clear.

- c. Lender-imposed restrictions are in accordance with MoHB policies and procedures or, in the case of exceptions to that policy, exceptions will be cleared through appropriate channels
- d. Costs associated with the loan are within the approved budget.
- e. The proposed object(s) are free of hazardous attributes and are in stable condition capable of withstanding the stresses of transportation and display.
- f. MoHB will borrow only objects that it can adequately care for in a manner consistent with the care of its own collection.
- g. MoHB will not accept incoming loans offered for the purposes of commercial exploitation or to increase the value of the object when sold and will not knowingly exhibit any object that has been illegally or unethically acquired.
- h. The Museum of History *Benicia* staff member negotiating the loan will provide the Registrar with the checklist information needed to issue the loan agreement(s) to the lender. A current facilities report will be provided with a certificate of insurance as evidence of the insurance coverage in place for the object(s) on loan. Loans will be insured based on their fair market value established by independent appraisal, if necessary. It is the responsibility of the lender to inform the Benicia Historical Museum if the stated value of the object changes during the period of the loan.
- i. The Museum of History *Benicia* reserves the right to use its own standard loan agreement but will also complete any necessary paperwork required by the lender making all attempts to comply with the lender's conditions.
- j. The Curator will negotiate packing, shipping, and handling details with the lender. The Museum will comply with the lender's requirements regarding condition reports and, if none, will implement its own documentation of condition upon receipt and return.
- k. It is the responsibility of the lender to inform the Museum of History Benicia in writing if their address or ownership status changes during the loan period. At the end of the loan period, the museum will return the object(s) to the lender listed on the loan agreement, unless prior written authorization from that lender is received to deliver the object to another party.

Abandoned loans will be dealt with under California Civil Code Section 1899-1899.11. Loans where the lender has failed to maintain contact with the museum for more than 25 years become the property of the Museum of History *Benicia*.

Access to Collections

The collections of the Museum of History Benicia shall be accessible for legitimate research and study by qualified, responsible historians, academicians, museum professionals, writers, students, and other professional researchers. Accessibility will be subject to any and all procedures necessary to safeguard the object(s) and the restrictions required by limitations of normal operating hours, exhibition requirements, study space, and availability of facilities and staff. Museum staff members only will be permitted to select and remove artifacts from collection storage. Access to non-public areas of the Museum will be tightly controlled and visitors will be escorted/observed by appropriate staff or volunteers during their visit.

The Museum actively encourages the use of the Museum's research material to continue the public's education of Benicia, the Arsenal, California History, etc. All catalog, accession, and archival records and materials that are the property of the Museum of History *Benicia* will be treated as public information within the following restrictions:

1. Requests for anonymity by donors will be honored, but only if this does not obscure the provenance of the artifacts.
2. Individuals requesting access to acquisition records must so state the purpose of their inquiries. Access will be limited to legitimate and legal inquiries. The Museum is under no obligation to facilitate random searches that may be for the purpose of monetary gain.
3. Subject to the approval of the Curator, archival material may be accepted with restrictions on access, when such restrictions are necessary to protect individuals or communities from harm or distress that might be caused by public disclosure of the contents of the documents. All restrictions must conform to accepted standards for public archives and must include reasonable termination dates.
4. Costs of reproducing documentary materials and photographs will be charged to requestors. No distinction in such charges shall be made on the basis of the value or rarity of the original materials. Methods of reproduction may be limited if necessary to protect the originals from damage.
5. Royalties or reproduction fees will be charged when deemed appropriate.

6. Conditions related to copyright and royalties will be observed for reproductions and credit given to the Benicia Historical Museum as the source.

Exhibitions

An exhibition is a process of presenting one or more objects with accompanying interpretive and educational materials for the purpose of informing, inspiring, and enlightening a defined audience. Exhibitions are an appropriate use of Museum collections and are an integral part of the mission of the Museum of History *Benicia*.

Primary Responsibilities

The Museum's primary responsibility for exhibition is the use of its collections in the dissemination of new information. The Museum is obligated to ensure the information it presents in all exhibitions is honest, objective, and accurate

Exhibit Guidelines

The Museum selects exhibits based on merit, scholarship, and relevance to its mission. Exhibitions will adhere to the concepts of public service and education while subscribing to standard practices in the museum field. The following represents a general understanding of what is considered by the Museum of History *Benicia* to be unacceptable exhibitions.

1. Exhibition that compromises an artist's or scholar's work or rights.
2. Exhibitions that publicize or promote commercial products or services
3. Exhibitions that willfully, with malice impugn the reputation(s) of any person or people.
4. Exhibitions that perpetuate myths or stereotypes
5. Exhibitions that threaten the health and safety of Museum staff or visitors
6. Exhibitions that express a person's political beliefs or promote/enhance a particular belief, attitude, dogma, race, gender, religion, sexuality, etc.

Education Collections

Objects and collections, or other assets that may be acquired as part of the education collection should be acquired by the Curator in consultation with the requisite staff who will utilize the materials for museum programs.

The education collection holds objects and materials intended for use in Museum educational exhibitions or other public program-related experiences. The education collection is a collection whose very nature is made up of disposable materials and objects to be used in a hands-on fashion, suitable for one or more of the Museum's public programming activities or objectives. While these items can complement permanent collections items, education collections can be used in lieu of original artifacts when or where original artifacts would be at undue risk when exhibited or used.

Acquisition

Materials and objects may be acquired by purchase, gift, exchange, field collection, archeological excavation, deaccession from the permanent collection, or by any other means deemed to be an appropriate transaction by which full and absolute title is transferred to the Museum of History *Benicia*. No materials or objects shall knowingly be acquired or accepted which are known to have been illegally imported or collected in a manner contrary to local, state, or federal law, regulation, treaty, or convention.

Criteria for Acquisition of Education Collections

Criteria used to assign an item to the education collection include:

1. Lack of data or information about the item
2. The Museum already has multiple representatives of the item in the Permanent Collection
3. The item is damaged and therefore makes it less significant for the Permanent Collection

Through the deaccession process, the Curator may transfer an object from the Permanent Collection to the Education Collection under the following circumstances:

1. Only items that can be handled safely or have multiple copies may be designated as hands-on Education Collections. This designation is an informal process between the Curator and the education/exhibit staff who use the objects.
2. Education Collections items are not accessioned, and the MoHB expects that these items may deteriorate with use and in time will need to be replaced.
3. Items must be structurally sound and inherently stable to allow for reasonable and safe use by staff, volunteers, and visitors.
4. Original items shall, first and foremost be deemed not suitable for acquisition into the Permanent Collection.

5. Items, other than reproductions, should not possess original and/or fragile surfaces, finishes, paint, or other media.
6. Items should be readily available.

Authority for Acquisition

The Curator designates educational items at the time the donation is received and those objects are not accessioned. Items are authorized and designated by the Curator for transfer to the Education Collection for use in programmatic experiences.

Accessioning

Education Collections objects or materials acquired for the Education Collection shall NOT be accessioned into the Permanent Collection. The Curator shall maintain permanent acquisition files that shall contain all legal instruments and conveyances concerning each acquisition and its origin, which shall be separate from the records and files for the Permanent Collection. Items in the Education Collection with an estimated value in excess of \$100 shall be assigned Education Collection registration numbers so they can be tracked by the collection staff.

Care and Preservation

All records regarding the acquisition, location, repair, or disposal of items in this collection will be kept by the Curator. The Education Collections are made up of objects and materials intended to be placed in environments or used in processes that inevitably lead to their destruction. It is understood that these items possess a monetary and educational value and, in all cases, represent a finite resource and are used in a manner that encourages their long-term use and preservation.

Items may be painted, repainted, distressed, lubricated, sharpened, or replaced, etc. damaged or missing elements may be repaired, replicated, or replaced by competent individuals. Funds for such work will come from budgets within the Education Department, not from the budgets for care of Permanent Collections pieces, or those derived from deaccessioning.

Disposal of the Education Collections

Since items in the Education Collection are intended to be used, and are, as such, disposable, education staff and volunteers will report lost, broken, or those which cannot long be used to the Curator. Items may be disposed of as the staff sees fit.

Ethical Standards

While every staff member is entitled to a measure of personal independence in professional and scholarly judgment each is expected to acknowledge the degree of public esteem resulting from association with the Museum of History *Benicia* and to exercise that independence in a manner consistent with professional and corporate obligations. Staff members shall avoid activities likely to be perceived as an abuse of their official positions with the Museum of History *Benicia* or their contacts with the community of like institutions.

As a condition of employment, acceptance of certain restrictions necessary to maintain public confidence in the Museum of History *Benicia* and the museum profession is essential. Staff members shall employ a high degree of circumspection in referring the public to outside suppliers of services such as appraisers, dealers, restorers, or conservators. Whenever possible, at least three qualified sources should be provided so that no appearance of favoritism is created. In no event shall any fee, gift, favor, or other form of dispensation be accepted because of such referrals. Staff members shall not make appraisals of artifacts other than for internal use by the Museum of History *Benicia*.

Personal Collections

Employees, whether full-time or part-time, shall not compete with the Museum of History *Benicia* to acquire an object. All Officers, Directors, and full-time employees shall specifically be required to observe the following procedures with respect to the formation of personal collections:

1. Upon learning of or acquiring an object that may relate to the museum's collections, all Officers, Trustees, and all employees must give the Museum of History *Benicia* the first option to acquire the object at its stated purchase price plus out-of-pocket costs.
2. Any personal acquisition within the Museum's sphere of interest must be disclosed. If it is appropriate and necessary to the collections of the museum, the museum may purchase it at that time. If not appropriate, senior collections staff shall formally decline the purchase, thereby waiving the Museum's future interest.
3. For the protection of both Officers, Directors, and employees and the Museum of History *Benicia*, any offer and response shall be documented. Collections acquired before employment, though family inheritances and any collections outside the museum's fields of interest are exempt from these requirements.

4. Employees shall not act as antiques or collectibles dealers, be employed by dealers, or retain an interest in a dealership. Although artifacts may be acquired for a personal collection and later resold at a profit, this should not be the principal motivation for their acquisition.
5. Officers, Directors, or employees, shall not possess or remove any item from the museum grounds for any reason, other than those already specifically authorized in this document, without the written permission of the Curator and the Director. Such permission shall only be granted in exceptional circumstances and only when the removal of the item from the museum grounds furthers the official purposes of the Museum. The reason and duration of such possession shall be documented through the appropriate loan forms.
6. Employees, whether full-time or part-time, shall not store or conserve personal collections on museum property. If employees lend objects from a personal collection for a specific museum exhibition or agree to their use as illustrations in Benicia Historical Museum publications, they may do so anonymously or may be cited as the owner.
7. If a trustee or employee, whether full-time or part-time, decides to dispose of part or all of their personal collection of items within Museum's field of interest, it would be appropriate to offer it first to Benicia Historical Museum, whether as a gift or at fair market value. In the event of public sale, the employee must be sensitive to their relationship with the museum, must not trade on that relationship, and must differentiate personal ownership from institutional affiliation.

American Alliance of Museums - Code of Ethics for Museums

Museums make their unique contribution to the public by collecting, preserving, and interpreting the things of this world. Historically, they have owned and used natural objects, living and nonliving, and all manner of human artifacts to advance knowledge and nourish the human spirit. Today, the range of their special interests reflects the scope of human vision. Their missions include collecting and preserving, as well as exhibiting and educating with materials not only owned but also borrowed and fabricated for these ends. Their numbers include both governmental and private museums of anthropology, art history and natural history, aquariums, arboreta, art

centers, botanical gardens, children's museums, historic sites, nature centers, planetariums, science and technology centers, and zoos. The museum universe in the United States includes both collecting and non-collecting institutions. Although diverse in their missions, they have in common their nonprofit form of organization and a commitment of service to the public. Their collections and/or the objects they borrow or fabricate are the basis for research, exhibits, and programs that invite public participation.

Taken as a whole, museum collections and exhibition materials represent the world's natural and cultural commonwealth. As stewards of that wealth, museums are compelled to advance an understanding of all-natural forms and of the human experience. It is incumbent on museums to be resources for humankind and in all their activities to foster an informed appreciation of the rich and diverse world we have inherited. It is also incumbent upon them to preserve that inheritance for posterity.

Museums in the United States are grounded in the tradition of public service. They are organized as public trusts, holding their collections and information as a benefit for those they were established to serve. Members of their governing authority, employees and volunteers are committed to the interests of these beneficiaries. The law provides the basic framework for museum operations. As nonprofit institutions, museums comply with applicable local, state, and federal laws and international conventions, as well as with the specific legal standards governing trust responsibilities. This Code of Ethics for Museums takes that compliance as given. But legal standards are a minimum. Museums and those responsible for them must do more than avoid legal liability, they must take affirmative steps to maintain their integrity so as to warrant public confidence. They must act not only legally but also ethically. This Code of Ethics for Museums, therefore, outlines ethical standards that frequently exceed legal minimums.

Loyalty to the mission of the museum and to the public it serves is the essence of museum work, whether volunteer or paid. Where conflicts of interest arise—actual, potential or perceived—the duty of loyalty must never be compromised. No individual may use his or her position in a museum for personal gain or to benefit another at the expense of the museum, its mission, its reputation and the society it serves.

For museums, public service is paramount. To affirm that ethic and to elaborate its application to their governance, collections and programs, the American Association of Museums promulgates this Code of Ethics for Museums. In subscribing to this code, museums assume responsibility for the actions of members of their governing authority, employees and volunteers in the performance of museum-related duties. Museums,

thereby, affirm their chartered purpose, ensure the prudent application of their resources, enhance their effectiveness and maintain public confidence. This collective endeavor strengthens museum work and the contributions of museums to society—present and future.

Governance

Museum governance in its various forms is a public trust responsible for the institution's service to society. The governing authority protects and enhances the museum's collections and programs and its physical, human, and financial resources. It ensures that all these resources support the museum's mission, respond to the pluralism of society, and respect the diversity of the natural and cultural commonwealth. Thus, the governing authority ensures that:

1. All those who work for or on behalf of a museum understand and support its mission and public trust responsibilities.
2. Its members understand and fulfill their trusteeship and act corporately, not as individuals.
3. The museum's collections and programs and its physical, human, and financial resources are protected, maintained, and developed in support of the museum's mission.
4. It is responsive to and represents the interests of society.
5. It maintains the relationship with staff in which shared roles are recognized and separate responsibilities respected.
6. Working relationships among trustees, employees, and volunteers are based on equity and mutual respect.
7. Professional standards and practices inform and guide museum operations.
8. Policies are articulated, and prudent oversight is practiced.
9. Governance promotes the public good rather than individual financial gain.

Collections

The distinctive character of museum ethics derives from the ownership, care, and use of objects, specimens, and living collections representing the world's natural and cultural commonwealth. This stewardship of collections entails the highest public trust and carries with it the presumption of rightful ownership, permanence, care, documentation, accessibility, and responsible disposal. Thus, the museum ensures that:

1. Collections in its custody support its mission and public trust responsibilities.

2. Collections in its custody are lawfully held, protected, secure, unencumbered, cared for, and preserved.
3. Collections in its custody are accounted for and documented.
4. Access to the collections and related information is permitted and regulated
5. acquisition, disposal, and loan activities are conducted in a manner that respects the protection and preservation of natural and cultural resources and discourages illicit trade in such materials.
6. Acquisition, disposal, and loan activities conform to its mission and public trust responsibilities.
7. Disposal of collections through sale, trade, or research activities is solely for the advancement of the museum's mission. Proceeds from the sale of nonliving collections are to be used consistent with the established standards of the museum's discipline, but in no event shall they be used for anything other than acquisition or direct care of collections.
8. The unique and special nature of human remains, and funerary and sacred objects is recognized as the basis of all decisions concerning such collections.
9. Collections-related activities promote the public good rather than individual financial gain.
10. Competing claims of ownership that may be asserted in connection with objects in its custody should be handled openly, seriously, responsively, and with respect for the dignity of all parties involved.

Programs

Museums serve society by advancing an understanding and appreciation of the natural and cultural commonwealth through exhibitions, research, scholarship, publications, and educational activities. These programs further the museum's mission and are responsive to the concerns, interests, and needs of society. Thus, the museum ensures that:

1. Programs support its mission and public trust responsibilities.
2. Programs are founded on scholarship and marked by intellectual integrity.
3. Programs are accessible and encourage participation of the widest possible audience consistent with its mission and resources.
4. Programs respect pluralistic values, traditions and concerns.
5. Revenue-producing activities and activities that involve relationships with external entities are compatible with the museum's mission and support its public trust responsibilities.
6. Programs promote the public good rather than individual financial gain.

Promulgation

This Code of Ethics for Museums was adopted by the Board of Directors of the American Association of Museums on November 12, 1993, and revised in 2000. The AAM Board of Directors recommends that each nonprofit museum member of the American Association of Museums adopt and promulgate its separate code of ethics, applying the Code of Ethics for Museums to its own institutional setting.

A Committee on Ethics, nominated by the president of the AAM and confirmed by the Board of Directors, will be charged with two responsibilities:

1. Establishing programs of information, education, and assistance to guide museums in developing their own codes of ethics.
2. Reviewing the Code of Ethics for Museums and periodically recommending refinements and revisions to the Board of Directors.

Afterword

Each nonprofit museum member of the American Association of Museums should subscribe to the AAM Code of Ethics for Museums. Subsequently, these museums should set about framing their own institutional codes of ethics, which should be in conformance with the AAM code and should expand on it through the elaboration of specific practices. This recommendation is made to these member institutions in the belief that engaging the governing authority, staff, and volunteers in applying the AAM code to institutional settings will stimulate the development and maintenance of sound policies and procedures necessary to understanding and ensuring ethical behavior by institutions and by all who work for them or on their behalf.

The Code of Ethics for Museums serves the interests of museums, their constituencies, and society. The primary goal of AAM is to encourage institutions to regulate the ethical behavior of members of their governing authority, employees and volunteers. Formal adoption of an institutional code promotes higher and more consistent ethical standards.

Review of Policy

The Collections Policy adopted by the Museum of History *Benicia* will be reviewed every five years by a multi-disciplined Museum committee appointed by the Director. Proposed revisions will be taken to the Board of Directors for approval.

Public Disclosure

This Collections Policy as adopted by the Museum of History *Benicia* will be furnished to the Board of Directors, staff, and volunteers of the Museum. Upon request the policy will be given to the press, other organizations, borrowers, and potential donors to the museum.