

# Acquisition Policy

*Approved by: Library Board of Control, Date: Aug 2009*

## Introduction

The Bossier Parish Libraries History Center seeks and will consider additions to the collections that further the History Center's purpose of acquiring, arranging, cataloging, preserving, exhibiting, maintaining, and storing items (for purposes of this policy, the word "items" will include documentary materials and museum objects) of lasting value concerning Bossier Parish history and culture. This includes items made in, used in, or materials that reflect present day Bossier Parish or historic Bossier Parish. Items concerning, or associated with, though not made or used in Bossier Parish may be eligible for inclusion in the History Center's collection.

Decisions to accept items will be made by the Collections Committee, whose members will be selected by the History Center's Manager.

## Categories of Collections

The Bossier Parish Libraries History Center maintains two categories of collections:

1. Permanent collections: Only collections relating directly to the History Center's stated purpose, subject to the concerns and protections and collections care regulated by policy and law shall be designated as permanent collections. Designation of permanent collection status denotes the intent to thoroughly document, protect, and preserve the item for future generations. Public access to the permanent collection is primarily through exhibits, programs or research.
2. Educational collections: Items are recommended for the educational collections by the Collections Committee. These items include accessioned materials transferred from the permanent collection, artifact reproductions, and items purchased for the expressed intent of inclusion in the educational collections. Educational collections are maintained in order to support the research and educational functions of the History Center and do not become part of the Permanent Collections. These items may be utilized with minimal supervision but must still be maintained with appropriate recordkeeping. Two subcategories are study and demonstration collections.
  - a. Study collection: The study collection is of significant interest for genealogical research, in accordance with the stated purpose of the History Center.
  - b. Demonstration "prop" collection: Items in this collection are inauthentic support material that are clearly distinguishable from an authentic item and are considered expendable. They typically are contemporary in nature or a contemporary reproduction of an authentic item. These items may be used and handled by patrons in the interpretive programs of the History Center.

## **Criteria for Acquisitions: General Collections Parameters**

Items may be acquired by the History Center through donation, bequest, exchange, or, rarely, purchase provided they meet one or more of the criteria listed below.

Acquisition of an item that does not meet the following criteria but that presents an exceptional opportunity for the History Center is subject to approval of the Collections Committee.

No materials or objects shall be willfully accepted or acquired when known to have been illegally collected contrary to state and/or federal law, regulations, treaty and/or conventions. Item(s) must be relevant to and consistent with the stated purposes and activities of the History Center.

1. The History Center can provide for the storage, protection, and preservation of the item(s). In the interest of preservation, the History Center rotates items on exhibition. For this reason, no acquisition shall be considered with any stipulation of exhibition, unless determined otherwise by the Collections Committee.
2. Items will not be acquired if they are encumbered with conditions, including those relating to exhibition, by the donor, except in rare, special cases approved by the Board of Control.
3. Items(s) will have permanency in the collection as long as they retain their physical integrity, their identity, their authenticity, and/or as long as they remain useful for the purposes of the History Center. Items that do not retain such attributes may be removed from the collection in accordance with the deaccession policy.
4. All moral, legal, and ethical implications of the acquisition have been considered. Valid and legal title must be established and transferred to the History Center. In doubtful cases, the History Center may request the assistance of its legal council.
5. Items must be transferred to the History Center with secure copyright, patent, and/or trademark rights in order to have full use of the acquisition, in accordance with existing copyright legislation.
6. There must be no legally binding restrictions contained in the terms of the gift or purchase.
7. The History Center shall not accept items that are hazardous to people or property and fall under any of the following hazardous categories: explosive, carcinogenic, flammable, corrosive, or teratogenic.
8. All donations to the History Center are considered outright, unconditional gifts to the people of Bossier Parish, unless determined otherwise by the Collections Committee at the time of accessioning.
9. The History Center does not appraise or authenticate objects offered as donations.
10. Charitable Contribution Deduction for Donors: Donations with a value of \$5000.00 or more require that an Internal Revenue Service Form 8283 be completed. In order to trigger the requirements, the contribution must be valued in excess of \$5000.00 or contributions by the taxpayer of similar objects in the taxable year to all charities must total a value in excess of \$5000.00
  - a. The taxpayer must obtain a "qualified appraisal" of the property contributed
  - b. An appraisal summary must be attached to the return on which such deduction is first claimed.

- c. The appraisal summary must be in such form as the Internal Revenue Service prescribes, it must be signed by the appraiser and carry the tax identification number of the appraiser.
- d. The appraisal summary must be acknowledged by the History Center in such a manner as the Internal Revenue Service prescribes; (see note below) and
- e. The appraiser must be a qualified appraiser.

NOTE: Under Section 155 of the Tax Reform Act of 1984, the Bossier Parish History Center must receive copies of and “acknowledge” certain appraisal summaries donors are required to file with the IRS. The legislative history of this provision contains the following statement: “The donee’s acknowledgement signature on the summary appraisal solely represents acknowledgement of receipt of the items described in the summary appraisal and in no way is to be construed as indicating the donee’s agreement with or acceptance of the amount claimed for the donated property on the appraisal summary.”

### **Criteria for Acquisitions: Specific Collections Parameters**

1. Non-Bossier Parish items: May be collected at the discretion of the Collections Committee to fill a gap in an existing collection if it can be ascertained that such an item would have been used or found in Bossier Parish; and also providing that such an item is a viable one that meets the goals of the History Center. Such items may be deaccessioned under the provisions set forth in the deaccession policy, as appropriate Bossier Parish items become available.
2. Museum Quality/Historic Value: Items of historic significance will be collected regardless of aesthetic or intrinsic value. Items typical or common in their time will often be of greater historical value in the future than the unique one-of-a-kind item. Physical condition and the History Center’s ability to care for items will be strongly considered but may not necessarily preclude the item’s acceptance into the collection if they are of exceptional historic importance. Items of a sentimental nature or nostalgic value to the donor should be distinguished from historically significant materials and should not be collected unless they are also of historic value.
3. Duplication of Collections: Duplicates, items similar or identical to items held by the History Center, may be accepted if they contribute to the quality and scope of an existing collection and/or if they may be used to supplement the educational collections. While acquiring duplicates is advisable for purposes of exhibition and research, individual unique items remain the acquisition priority for the History Center. Duplicates will not be accepted if they will constitute an excessive burden on the History Center’s resources, staff, or regular collections.
4. Integrity of Collections: Collections of related materials consisting of both Bossier Parish and non-Bossier Parish items may be accepted upon the recommendation of the Collections Committee. If such a collection is primarily Bossier Parish, it may be accepted in its entirety into the History Center’s collections. If the collection as a whole is more relevant and more valuable in its entirety to another museum, library, archive, or public institution, it may be referred to another institution by the Manager.
5. Appropriateness of provenance: Items considered for acquisition must be transferred by the owner with clear title or by an executor with proven authority.

- a. Items must not be illegally imported into the United States or illegally collected within the United States.
- b. The History Center does not condone the destruction of historic sites, buildings, habitats, districts, or objects, and will not accept items collected in a manner to cause such destruction.
- c. The History Center will not accept items that are subject to repatriation under the provisions of Native American Graves Protection and Repatriation Act of 1990.
- d. The History Center may request appropriate documentation of any item(s) and should be reasonably assured that the History Center can acquire valid and legal title to the item(s).

### **Commencement of Ownership**

Items may be accepted by bequest, gift, museum exchange, field collection, excavation, or any other transaction by which title to the item passes to the History Center. The authority to formally accept an item in the collections shall be limited to the Collections Committee. A Temporary Custody Form, which does not obligate the History Center to formally accept any item, should be used until the Collections Committee has met. Consideration of restricted gifts, short-term loans, indefinite loans, and exchanges shall follow the guidelines set forth in the acquisition policy.

1. Gifts and Bequests
  - a. The History Center is considered to own the item when a Deed of Gift Agreement has been legally executed and the item physically enters the History Center.
2. Exchanges
  - a. Same as 1.) Gifts and Bequests.
  - b. Exchanges may be made only with museums, libraries, archives, or other public institutions whose basic interest parallel those of the History Center. Exchanges will not be conducted with individuals.
  - c. Exchanges must be approved by the Manager. A proposed exchange involving an item of significant value is subject to the approval of the Board. Board members having a separate interest or stake in the outcome of a proposed exchange beyond that of Bossier Parish Libraries History Center shall not vote on or participate in deliberations regarding the exchange, except to provide information.
  - d. The History Center may require full and documented provenance on any item involved in an exchange.
3. Purchases
  - a. The History Center is considered to own the item when it has rendered payment for the item, subject to any conditions of delivery.
4. Abandonment
  - a. If a lender cannot be located or identified, the History Center will be guided by the advice and recommendations of its legal counsel.
5. Field Collection
  - a. Items collected in the field by curators or staff members during History Center-financed trips are the property of the History Center. Ownership commences following the conclusion of the expedition/field trip and Board approval.

## Acquisition Procedures

Items brought in by a donor or vendor for acquisition consideration may be left in the custody of the Bossier Parish Libraries History Center provided that a Temporary Custody Form has been completed. All collections management forms will be stored in the designated file cabinet of the archives room.

Once the Collections Committee accepts an item, the following steps are taken:

1. The donor/vendor will deliver the item(s) to the History Center. Any other arrangements must be made with approval of the Collections Committee. If the History Center must pick up the item(s) without the presence of the donor, such arrangements will be in writing from the donor to the Manager, along with the name, address, telephone number, complete listing of the item, and date and time of requested pick up.
2. As the item(s) enters the History Center, or is picked up from a potential donor/vendor, a Deed of Gift will be completed. One copy is given to the donor/vendor and one copy is placed in the Deed of Gift file at the History Center. The History Center staff will not appraise the item for the donor's purposes.
3. If the object is received in the mail, the Deed of Gift will be sent for signature to the sender with a return envelope and instructions for return of the Deed of Gift to the History Center.
4. New acquisitions will be entered into the accessions register as soon as possible.
5. An initial condition report will be completed by the Curator of Collections.
6. A storage location will be found for the item(s). Any accessioned items that have yet to be cataloged will be flagged in PastPerfect and in the accession register.
7. The History Center staff will conduct all necessary research and compile available information. The donor/vendor may be asked to provide information regarding the history of the item(s).
8. New acquisitions will be processed and cataloged as soon as possible.