

NEWTON HISTORY MUSEUM
AT THE JACKSON HOMESTEAD
COLLECTIONS MANAGEMENT POLICY

Newton History Museum
527 Washington Street
Newton, MA 02458

Revisions through November 1999
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MISSION STATEMENT
OF THE JACKSON HOMESTEAD

The mission of The Jackson Homestead and the Newton Historical Society is to encourage the inquiry and exploration of Newton within the broad context of American history. To accomplish this mission, The Homestead maintains a museum and historic property that interprets Newton's past and present. The Homestead collects, preserves, and exhibits historical artifacts of local significance and presents public programs that involve the diverse population of Newton and the region. (Revised, April 11, 2001)

INTRODUCTION

The Jackson Homestead was established as a community museum and as a department of the City of Newton in 1950. (Ordinance No. 259) Its nine-member Board of Trustees is appointed by the Mayor. The Newton Historical Society, originally known as the Friends of The Jackson Homestead, was founded by the Trustees in 1953 to receive and disburse "monies" other than municipal funds and to provide volunteer support for the museum. The Trustees and the Directors of the Newton Historical Society meet as a Joint Board, forming a public/private partnership to insure professional management of the museum, the collections, and the programs of The Jackson Homestead.

The collection was begun in 1950 when The Jackson Homestead opened to the public as a historic house. At that time, objects thought to be interesting and complementary to the historic status of the house were displayed. There was no collection policy to define collection goals, therefore, some objects had no real connection with the community, and many were not of museum quality. In addition, antiques thought consistent with the early nineteenth century (the period in which the house was built) were purchased to furnish rooms. Documents and reference materials were also collected during this period, beginning a substantial research collection which today provides support for museum programs, exhibitions, and outreach. In the 1980s, self-scrutiny (notably MAP I and MAP II) led to the realization that as a house museum The Jackson Homestead could not successfully compete with several excellent examples of Federal house museums (Gore Place, Sturbridge Village, and the Harrison Gray Otis House) in the Boston area. Accordingly, the Trustees of The Jackson Homestead and the Directors of the Newton Historical Society voted to change the mission from that of historic house to community history museum. The revised mission statement, collections policy, and improved collection procedures have strengthened the content and the quality of both the object and document collections, and together, these collections provide a strong base for the Homestead's identification as a community history museum.

Artifacts in The Jackson Homestead's collections include a broad range of objects and documents relating to Newton history. The object collection currently consists of approximately fifteen thousand items, including but not limited to tools and equipment, textiles and costumes, personal and recreational artifacts, and art objects. The document collections contain approximately thirty-five thousand items, including manuscripts, maps and plans, prints, photographs and slides, audio and video tapes, and a collection of books on local history. The objects and documents in the collections range in date from the seventeenth century to the present, but are predominantly from the nineteenth and early twentieth centuries.

Management of the collections is described in the *Collections Management Manual*, first developed in 1985 and last revised in 1999. The manual will be reviewed informally on a yearly basis, and formally bi-annually. The Collections Policy section of the manual shall be approved by the Joint Board. Revisions to the *Manual* shall require the approval of the Curators, Director, and Collections Committee.

COLLECTIONS POLICY

1. STATEMENT OF PURPOSE

The Jackson Homestead shall keep a collection of those artifacts that enables it to maintain a museum that interprets Newton history and furthers historical research on the city. Objects and documents may reflect all aspects of life and work in Newton and should have a Newton provenance. Non-Newton items that further the mission of TJH may also be acquired. The Curators, Director, and Collections Committee determine whether or not items meet the criteria for accessioning.

All items in the collection are accessible to interested persons for the purpose of education and research. Permanent collection holdings include objects and documents that are accessioned items for collection and display. Education collection holdings are not accessioned and are managed separately from the permanent collection; they may be used as hands on teaching tools.

In all actions, museum personnel shall comply with the Collections Policies herein stated and with *The Jackson Homestead Code of Ethics*.

2. COLLECTIONS MANAGEMENT

A. Collections Committee

The Collections Committee is charged with overseeing the management of The Jackson Homestead (TJH) collections. The Committee's responsibilities include setting collection policies, formulation of policies concerning storage facilities and curatorial procedures, making recommendations pertaining to the acquisition or the deaccessioning of items in the collection, and consideration of all issues regarding collections care. The Collections Committee shall, in its decisions on acquisition of appropriate materials and on the retention of items already in the collection, consider that the institution is an accredited museum and desires to retain accredited status. The Collections Committee shall regularly report to the Joint Board.

1). Committee Structure

The Collections Committee is composed of members of the Newton Historical Society, representatives of the Board of Trustees, members of the staff, and may include others. Staff members are non-voting. Three formally defined positions are structured within the committee, that of the Chair, appointed from the Joint Board, and the staff Curators. The Committee may further organize itself by creating sub-committees to oversee acquisition, deaccession, conservation, storage, archives, or other matters.

The Chair and/or Curators are responsible for presentation of reports at the Joint Board meetings. The Chair, in collaboration with the Curators, is responsible for coordination of committee meetings. The curators are responsible for the supervision of projects undertaken and report to the Committee regarding the collections, i.e. new acquisitions, loans, deaccessions, etc., and collections care.

2). Schedule of Meetings

Regular meetings will convene at the request of the Chair, Joint Board, or Curators.

B. Collections Administration

The collections shall be administered by the staff of The Jackson Homestead under the direction of the Collections Committee, as outlined above. The staff has three fundamental obligations:

- 1). Proper housekeeping, which requires maintenance of adequate records, the maintenance and improvement of storage conditions, and vigilance for signs of deterioration requiring appropriate attention by the staff or Collections Committee.
- 2). Effective use of the collections in preparing exhibitions, conducting other educational programs, and furthering research.
- 3). Ongoing evaluation of all aspects of the collections in order to help the Collections Committee make well-informed decisions.

3. COLLECTIONS SCOPE

The museum's permanent and education collections reflect the people and history of Newton from its beginning to the present. A separate Collections Plan outlines the focus for future collecting and refinement of collections. Current collections include:

A. Objects

- 1). Tools and equipment including artifacts associated with local artisans, organizations, businesses, industries, labor, and individual households.

- 2). Art objects created by or about local places or people for aesthetic purposes, or as a demonstration of creative skill and dexterity with no apparent utilitarian purpose.
- 3). Personal artifacts created to serve personal needs of individuals including clothing, adornment, body protection, grooming aids, or symbols of beliefs or achievements.
- 4). Recreational artifacts including items originally created to be used as toys or in carrying on the activities of sports, games, or public entertainment.
- 5). Textiles including artifacts originally created to be used in the making of thread, yarn, or cordage, or in the creation of objects from natural fibers or from cloth. Specific collections include quilts, samplers, and lace.
- 6). Objects relating to the abolition movement and to suburban development.

B. Documents

- 1). Personal papers including correspondence, journals, diaries, letterbooks, sermons, speeches, genealogies, and like materials.
- 2). Records and institutional histories of organizations and businesses in Newton.
- 3). Manuscript and printed material relating to social, cultural, religious, political, educational developments in Newton, including pamphlets, programs, posters, yearbooks, directories, and ephemera.
- 4). Visual materials including photographs, negatives, slides, posters, postcards, graphic ephemera, movies and videos of, or relating to, individuals, families, organizations, events, the natural and the built environment.
- 5). Documents and visual materials relating to the abolition movement and to suburban development.
- 6). Maps and plans.
- 7). Books on local history, City Directories, and bound public documents.

8). The Newton Historical Properties Survey.

4. ACQUISITIONS

A. Criteria for Accession into the Permanent Collections

- 1). Items reflect the institution's mission, are of significance to the history and development of Newton and are of general interest to the community.
- 2). Items were made by or used by Newton residents. Non-Newton items that further the educational mission of TJH may also be acquired.
- 3). Items are clean, in good condition, and ready for storage.
- 4). Items are appropriate for exhibition and other public programs or for research.
- 5.) The museum's ability to store and preserve an object properly is a primary factor in accessioning an item.

B. Criteria for Acquisition into the Education Collection

- 1). Items reflect the institution's mission, are of significance to the history and development of Newton and are of general interest to the community.
- 2). Items that can be used in the foreseeable future for hands on programming.
- 3). Items, including reproductions and duplicates of lesser quality, that are not appropriate for the permanent collection.
- 4). Items that are being deaccessioned from the permanent collection.

C. Evaluation of Potential Acquisitions

- 1). Items may be left, at the depositor's risk, for consideration for acquisition. In all cases a Temporary Custody Receipt must be completed.

2). The Curators and the Director determine whether or not items meet the criteria for accessioning, and consult the Collections Committee as needed. The depositor will be notified by TJH according to the conditions of the Temporary Custody Receipt.

3). If items have not been claimed after one year from date of final notification, TJH shall consider the items unrestricted gifts.

D. Conditions for Gift Agreement

1). Gifts are considered UNRESTRICTED and can be displayed or loaned, retained or sold, or disposed of in the best interests of the museum.

a). No item is considered for permanent display.

b). Restricted gifts may be accepted with approval by the Director, Curators, and Collections Committee. If the items are accepted with restrictions or limitations, the conditions must be clearly stated in the donor agreement, made part of the accession records, and be strictly observed by the museum.

c). Items not appropriate for the permanent collections may be accepted for the education collection. The donor agreement will reflect placement of items in the education collection that is managed separately from the permanent collections.

2). Any item sold has the restriction that the money from its sale goes toward acquisition or direct care of collections.

3). Gifts may be tax deductible in accordance with the provisions of federal income tax law. Obtaining appraisal value for tax purposes is the responsibility of the donor. The TJH is not permitted to place monetary value on items, nor can it pay for an appraisal. TJH can suggest reputable appraisers.

4). A legal instrument of conveyance signed by the donor, seller, or estate administrators or executors, and the Director of the Museum, setting forth an adequate description of the items and the precise conditions of transfer, will accompany all gifts, purchases and bequests, and will be kept on file at the museum.

E. Purchase of Collections Material

1). In accordance with AAM and TJH Codes of Ethic, the Acquisitions and Collections Care Funds shall be used only for acquisitions and direct care of the collections. (The Funds are defined in section 5. DEACCESSIONS.)

2). It is the goal of the Joint Board to replenish the amount spent from the Acquisitions and Collections Care Funds each year. The favored means for replenishment is through fundraising. If fundraising is unsuccessful, it is then up to the Joint Board to decide whether to allocate other Homestead funds to replenish the Acquisitions and Collections Care Funds.

3). TJH total expenditure out of the funds for one year should not exceed 15 percent of the holdings of the Acquisitions and Collections Care Funds, as calculated at the beginning of each fiscal year. The Collections Committee may recommend, and the Board approve, to increase or decrease the allowable expenditure.

4). The Director and Curators may purchase items for the collections as long as the cost does not exceed \$500.

5). The Collections Committee must recommend and submit to the Joint Board for approval the acquisition of any items exceeding \$500.

a). If necessary to secure an item offered for sale at a price exceeding \$500, prior to Collections Committee and Joint Board approval, a refundable deposit of up to \$500 may be offered by the Director and Curators.

b). If an immediate purchase of more than \$500 is necessary, the requirement of paragraph E.5 may be fulfilled by a

telephone poll of the Collections Committee and the Joint Board prior to purchase.

6). The staff must not set initial prices for any item offered for sale to The Jackson Homestead.

7). The staff shall make good faith efforts to obtain reasonable evidence that the seller of each item has valid title to it.

5. DEACCESSIONS

The deaccession of an object or document is its permanent removal from the museum's collection. The *Code of Ethics for Museums* published by the American Association of Museums, 1994, sets out that the disposal of collections "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." Proceeds from deaccessioning shall be placed in one of two restricted funds called the Objects Acquisitions and Collections Care Fund and the Documents Acquisitions and Collections Care Fund.

Collection objects and documents are retained so long as they are relevant and useful to the purposes and activities of the museum and if they can be properly stored, preserved, and used. Deaccession may be considered when these conditions no longer prevail, or in the interest of strengthening or improving another area of the collection in order to further the goals of the museum.

A. Criteria for Deaccession from the Permanent Collection

Deaccession of an item can be considered under limited conditions:

- 1). The item fails to meet stated collecting criteria.
- 2). The item duplicates material already represented in the collection.
- 3). The item's physical condition is severely deteriorated precluding use for study or exhibition and the when the cost of conservation is greater than the value and significance of the item.
- 4). The item cannot be given the proper care or cannot be used now or in the foreseeable future.
- 5). The item is fake or so heavily or badly restored that it has no study value.

- 6). The item is replaced by new donations of superior condition.
- 7). The item would be more appropriate to another museum's collection.

B. Authorization

- 1). Recommendations for deaccession shall be made by a Curator under the guidance of the Director.
- 2). Outside consultants may be used to evaluate or appraise a particular item(s).
- 3). Final approval for deaccessioning must be given by the Collections Committee and Joint Board with the exception of the deaccession of an item of so little worth that it cannot even be sold.

C. Documentation and Preliminary Procedures

- 1). The Curator(s) assemble(s) and review all documentation and complete a Deaccession Worksheet. The Curator(s) is responsible for insuring that TJH owns the item and that there are no restrictions.
- 2). Objects and documents will be held for seven years before being considered for deaccession. If circumstances require an object or document be considered for deaccession in less than seven years, the museum staff will notify the donor and explain why the museum wants to deaccession the item and how the funds will be used. If the donor cannot be reached or letter cannot be delivered, a reasonable attempt will be made to locate other family members.
- 3). Items acquired but not accessioned will be held for two years before sale to obviate need for filing a report to the IRS.
- 4). Items "Found in Collections" will not be considered for disposal for seven years from the date of discovery unless the item falls outside the Statement of Purpose.

D. Procedures

- 1). Appropriate public or not-for-profit cultural institutions will be contacted concerning deaccessioned items that may benefit their collections. Gift, exchange, or sale will be considered. TJH establishes the value after an appraisal has been done. Institutions will be required to match appraised value or bid.
- 2). Offering at public auction is the preferred method for sale of deaccessioned items, which are not desired by appropriate institutions. Two or more independent written bids will be received. The Collections Committee will make recommendations for venue.
- 3). Deaccessioned items may be transferred to the education collection.
- 4). If the item is of small value, it may be donated to another similar museum or organization.
- 5). Decrepit, worthless materials may be thrown away.
- 6). The method of deaccession must be approved by the Collections Committee and Joint Board before any consignment or contract is made.
- 7). Items may not be given or sold (directly or indirectly) to museum personnel as defined in section 8. ETHICS.
- 8). Documentation of any deaccessioned item will be maintained as part of the permanent record including date and reason for deaccession, any correspondence, new location (if known) and the amount of sale.
- 9). Checks should be made payable to the Newton Historical Society and credited to either the Objects Acquisitions and Collections Care Fund or the Documents Acquisitions and Collections Care Fund.

E. Return of Collections Material

The museum considers donations to the collections irrevocable. The museum, however, acknowledges that a donor or donor's heir may request the return of donated material. In that event the following procedure will be undertaken. The Jackson Homestead will require legal

documentation of claimant(s) official status. The legal status of the donation must be determined and any relevant correspondence must be located.

- 1). If there is no deed of gift and unless the item is of such great value to the Jackson Homestead that legal action to retain it is warranted, the item should be returned to the donor or his legal heir(s).
- 2). If the item was legally donated and a deed of gift is on file, the donor or heirs must make their request for return of items in writing to the Director, along with reasons for its return. The Director will then present the request to the Joint Board at the next meeting.
- 3). The Curators will provide the Joint Board with a written report outlining the monetary value of the item, the museum's relationship with the donor, the significance of the item within the collection, and any relevant extenuating circumstances.
- 4). The decision of the Joint Board is final.

F. Removing Museum Numbers

Identifying numbers will be removed from the items prior to their release in order to insure the museum remains anonymous.

6. LOANS

A. Incoming

- 1). Loan items shall be sought and accepted only when the item(s) in question are required for use in an exhibition or program and shall be only for the duration of the exhibition or program.
- 2). An Incoming Loan Agreement shall in every instance be drawn up. It will include the period of the loan and a description of the item, including its physical condition.
- 3). Copies are to be signed by both the lender and The Jackson Homestead Director and/or Curator. One copy is to be placed in the Homestead curatorial files.

4). The City of Newton must be notified of the value of the borrowed items in advance of their arrival on the premises, that being a requirement of the insurance provided by the City.

B. Outgoing

1). TJH loans collection items only to public or not-for-profit cultural institutions. All requests for outgoing loans shall be brought before the Collections Committee, it being the responsibility of the Director and/or Curator to make recommendations to the Committee about whether to make the loan.

2). TJH must own any item being considered for loan. It is understood that no item shall be loaned unless it is deemed likely to survive travel and changes in environmental conditions without harm. It is also understood that no item shall be loaned unless its security during travel and exhibition is guaranteed by the borrower.

3). In every instance the borrower must provide insurance and supply proof of insurance in the form of a binder or a policy.

4). All loans must be for a specified period of time, but unless otherwise stated, renewal for another specified period is an option.

5). An Outgoing Loan Agreement shall accompany each loan. In addition to containing a description of the item, including its physical condition, the period of the loan, the insured value, and the method of transportation, the agreement may contain other terms agreed to by The Jackson Homestead and the borrower.

a). Copies are to be signed both by the borrowing institution and the Homestead Director and/or Curator.

b). A copy shall be placed in The Jackson Homestead curatorial files.

7. CONSERVATION

Repairs, restoration, and conservation shall be performed only upon the recommendation of the Director, Curator, and the Collections Committee. All repair, restoration, or conservation measures shall respect the integrity of the item and shall

always use materials and techniques that are reversible. Whenever possible the services of professional conservators shall be engaged, and in each case a full record of treatment shall be prepared by the restorer/conservator and shall be retained in The Jackson Homestead curatorial files. Education collection materials will be maintained with reasonable care, but not conserved. A separate Conservation Plan outlines the museum's initiatives and strategies for current conservation activities.

8. ETHICS

The following revised ethics code is excerpted from The Jackson Homestead Code of Ethics approved by the Joint Board December 11, 1996 and amended November 10, 1999. This code of ethics applies to the members of the Joint Board of the Jackson Homestead, staff members, and volunteers. Such persons are collectively referred to herein as "museum personnel," under *Section 1: General Principles*, in *The Jackson Homestead Code of Ethics*. The collections of the Homestead support the organization's mission, and museum personnel shall make good faith effort to ensure their proper care and accessibility.

The Jackson Homestead Code of Ethics, Section 2: Governance

In regard to the acquisition, handling, or disposal of items, all museum personnel shall comply with accepted related practices and laws, such as the Archeological Resources Protection Act, the Native American Graves Protection and Repatriation Act, international conventions, and laws pertaining to natural and cultural resources.

The Jackson Homestead Code of Ethics, Section 3: Collections

1. Acquisition, disposal, and loan activities shall be compatible with the Homestead's mission and collections policy.
2. Museum personnel may not use their museum connection to foster their own collecting or the collection of a family member or business associate.
3. Museum personnel may not collect items with a Newton provenance of the same or similar nature as those collected by the Homestead as defined in *The Jackson Homestead Collections Management Manual*, Sections 3. and 4. unless such personal acquisitions are disclosed to the Joint Board. Bequests or genuinely personal gifts are exempt from this restriction.
4. Museum personnel may not deal in, i.e. regularly buy and sell for profit, items of the same or similar nature as those collected by the Homestead.
5. Payments for acquisitions shall be governed by the collections policy as established by the Collections Committee and the Joint Board. Where a market for an item exists, no above-market price shall be paid for the item except with the approval of the Collections Committee.

6. The Joint Board must approve all acquisitions for the collections purchased from museum personnel or members of their immediate families or business associates.
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 deaccessioned collection items shall be used only for acquisition or direct care of collections.
8. The museum shall not sell or trade items from the collection to museum personnel or members of their immediate families or business associates.
9. Items of trifling value that the museum cannot sell and that otherwise must be discarded may be given to anyone associated with the institution or the public.
10. Museum personnel may not commingle museum and personal effects either on or off the Homestead's premises. Loans of individual items to the Homestead by museum personnel for purposes of exhibition, program, or research must be clearly documented