



IDAHO STATE
**HISTORICAL
SOCIETY**

COLLECTIONS MANAGEMENT POLICY



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INTRODUCTION

MISSION, VISION, AND CORE VALUES

The Idaho State Historical Society (ISHS) preserves and manages the State of Idaho's historical, archaeological, capitol, manuscript, and permanent records collections. This collections management policy establishes the criteria and guidelines for ISHS collection acquisition, management, documentation, preservation, and use. It also serves as a guide for the consistent application of professional collections stewardship standards. The policy lays the foundation for acquiring and managing collections in the best interest of the objects and archives, the State of Idaho, and the constituents it serves.

Mission

The Idaho State Historical Society preserves and promotes Idaho's cultural heritage.

Vision

The Idaho State Historical Society's vision is to inspire, enrich and engage all Idahoans by leading the state in preserving, sharing, and using history and cultural resources to help frame the present and inform and shape the future.

Core Values

Idaho State Historical Society staff implements the mission and vision while embodying the core values of customer service, stewardship, education, and professionalism.

Customer Service

The Idaho State Historical Society:

- serves the historical needs of the entire state of Idaho.
- directly supports state agencies and tribal, city, and county governments.
- directly supports the immediate information needs of the public.
- directly supports teachers, students, families, tourists, and researchers.
- responds to the needs of its customers through purposeful program development and assessment.

Stewardship

The Idaho State Historical Society:

- collects, preserves, and provides access to archaeological and historical artifacts, and archival materials.
- represents statewide and national perspectives and increases stewardship of historic buildings and sites.
- sustains multiple sites and purposes in its work.

Education

The Idaho State Historical Society:

- teaches essential historical literacy and promotes learning and historical research processes through public programming.
- models an artifact and archival based approach to ideas about people, places, and events.
- focuses on participants and outcomes in program development.

Professionalism

The Idaho State Historical Society is committed:

- to making history a vital resource for the people of Idaho through both traditional programming and programming that serves the kindergarten through adult educational communities.
- to implementing the most professional practices possible, which align with national, state, and local standards. The ISHS follows standards and best practices established by the Society of American Archivists, the Council of State Archivists, the American Library Association, the American Alliance of Museums, the American Association for State and Local History, the National Historic Preservation Act of 1966, as amended (16 USC 470 et seq.), the Secretary of the Interior Standards for the Treatment of Historic Properties, the National Association of State Historic Preservation Officers, the Governmental Accounting Standards Board, the Association of Fundraising Professionals, and the Society of Human Resource Management.

ISHS DEPARTMENTS

The ISHS is comprised of distinct departments with collections oversight. Each department collects, manages, and provides access to a specific category of permanent collections, and a related category of temporary/educational materials, which are items of an expendable nature. This policy pertains to all ISHS departments and staff with collections oversight and access responsibilities.

Idaho State Museum

The Idaho State Museum collects and preserves historical materials from the distant past to the present, which illuminate the rich and unique cultural history of Idaho. The museum collection represents individuals and groups influential in the development of Idaho including: tribes, early missionaries, the Lewis and Clark Expedition, fur trappers, miners, loggers, pioneer settlers, farmers, ranchers, businesses, political and social movements, and territorial and state governments. These themes are illustrated through an estimated 50,000 objects from Idaho including American Indian beadwork, clothing, toys, saddles, baskets, and tools; arms and armaments; trapping, mining, farming and ranching tools and equipment; textiles, clothing, and personal adornments; large transportation objects relating to travel within the state; furniture and historic building fabric and hardware; recreational objects including sporting equipment and toys; and one of the largest traditional Chinese herbal medicine collections in the United States. The Idaho State Museum collections storage facility also houses collections from the Archaeological Survey of Idaho's Western Repository. The museum displays and interprets many of its collection materials in a 40,000 square feet exhibition building where visitors explore Idaho's history.

The Capitol Collection is also managed by staff at the Idaho State Museum. The Capitol Collection is an active collection of historic furniture, antiques, works of art, and objects of historical significance with a direct and often ongoing association with the Idaho State Capitol. This program actively manages approximately 2,000 objects, which are cared for in storage and throughout the capitol building. Collection materials at the capitol include objects displayed in formal public exhibitions and a large collection of actively used objects such as historic furniture. The program maintains associated collections documentation as part of its collections management program. It also participates in the active preservation of the capitol building.

Idaho State Archives

The Idaho State Archives (ISA) and Research Center provides public access to records of fiscal, administrative, legal, vital and long-term research value to the citizens and government of Idaho. ISA preserves a large and unique collection of materials that relate to the history of Idaho and the Pacific Northwest, including photographs, books, maps, manuscripts, oral histories, and government records. Idaho State Archives offers services that are essential to the state on all levels, providing information and understanding to everyone from genealogical/family researchers to publishers and professionals to state and local governments. While ISA collects permanent, inactive, records from county, city and state agencies, the State Record Center serves a complementary role in the collection and preservation of government records. The State Record Center carries out a statutory obligation to provide centralized records storage primarily for state agencies. While the State Record Center fulfills a similar mission to the Archives, many sections of this policy do not specifically apply to the record center.

Archaeological Survey of Idaho

The Archaeological Survey of Idaho (ASI) operates three repositories for the care of state and federally owned archaeological collections. The State Archaeologist has general oversight of the Archaeological Survey of Idaho and supervises operations of the Western Repository. The Western Repository is managed from the State Historic Preservation Office, with collections housed at the Idaho State Museum's storage facility. Collections at the Western Repository include approximately 820 cubic feet of archaeological materials from over 4,000 archaeological sites, including 83,000 prehistoric artifacts, faunal remains, and sediment samples, and 31,000 historic artifacts. The Western Repository also manages 62 linear feet of associated documentation for the archaeological collections. The University of Idaho manages the Northern Repository in Moscow, and Idaho State University manages the Eastern Repository in Pocatello. State-owned collections under the care of the ASI are property of the ISHS. Federal collections remain the property of the federal agency and are cared for under curation agreements or memoranda of understanding between the collection owner and the ASI repository. The collections curation program of the ASI ensures the preservation and continued access to archaeological collections from sites within the State of Idaho. In addition to curation activities, the ASI also establishes standards for researching and recording archaeological sites in Idaho, develops publications and programs for education and outreach, and conducts field and laboratory investigations.

State Historic Preservation Office

The State Historic Preservation Office (SHPO), under the direction of the ISHS Executive Director/State Historic Preservation Officer and State Archaeologist/Deputy State Historic Preservation Officer, maintains the state's records of all known and recorded archaeological and historical sites identified through the survey efforts of federal and state agencies, and Idaho cities and counties. This includes the Idaho Historic Sites Inventory (IHSI), a statewide inventory of approximately 33,000 architectural and historic properties, which serves as a permanent record of all known and recorded historic buildings, structures, objects, sites, and districts within the state. Documents related to the Idaho Historic Sites Inventory include: Historic Sites Survey Reports, which summarize the methods and results of architectural and historic site surveys; Historic Sites Manuscript Reports, which provide site-specific information; Historic Properties Records, which provide mitigative documentation similar to HABS/HAER/HALS with less stringent recording standards; and Context Studies, which provide for long-range preservation planning and cultural resource management. With a few exceptions, the SHPO makes these materials accessible to researchers, playing a key role in state-wide preservation planning activities.

The SHPO also manages all state archaeological investigation records including approximately 51,000 archaeological site records and over 33,000 archaeological reports. These records were originally generated by the SHPO, state and federal agencies, certified local governments, educational institutions, research organizations, private consultants, and independent researchers. These archaeological site records and reports are not subject to public records laws and are available only to qualified academic researchers or professionals gathering information to evaluate the effects of federal undertakings on archaeological and historic sites.

STATEMENT OF AUTHORITY

The ISHS is governed by a seven-member Board of Trustees. The trustees are selected by the Idaho State Governor to represent the seven judicial districts of the state. The Board establishes policy and makes legal, fiscal, and personnel decisions. They also act as advocates for the ISHS by engaging communities and citizens throughout Idaho. The Board of Trustees delegates the overall management of the society to the ISHS Executive Director. The Executive Director leads and represents the agency and oversees the department/workgroup administrators. The department administrators for the Idaho State Museum,

SHPO/ASI, and ISA supervise the day-to-day and long-term collections management operations. These department administrators and their collections staff are responsible for managing collections and implementing this collections management policy. This policy provides the foundation for consistent collections management practices that meet current professional standards. The policy is not intended to displace the authority of the ISHS Board of Trustees or Executive Director to set policy.

The responsibilities of the ISHS are identified in Idaho Code 67-4111 through 67-4131. The Board of Trustees (and subsequently ISHS staff) is charged with the following duties, stated in Idaho Code 67-4126, as amended (1970):

1. To appoint a director of the society as provided herein and advise him in the performance of his duties and formulate general policies affecting the society.
2. To encourage and promote interest in the history of Idaho and encourage membership in the society.
3. To collect for preservation and display artifacts and information illustrative of Idaho history, culture and society.
4. To print such publications and reports as may be deemed necessary.
5. To encourage creation of county historical societies and museums in the counties of Idaho.
6. To facilitate the use of Idaho records for official reference and historical research.
7. To be responsible for records management services for state government. Records management services include the management, storage and retrieval of all state created records under retention. State created records shall mean any document, book, paper photograph, sound recording or other material, regardless of physical form or characteristic, made or received pursuant to law or in connection with the transaction of official state business. The Board may charge reasonable amounts for records management services. The records managed pursuant to this subsection will not be subject to the exemption in public records law provided in section 9-337(15), Idaho Code.
8. To accept from any state, county, or city, or any public official, any official books, records, documents, original papers, newspaper files, printed books, or portraits, not in current use. When such documents are so accepted, copies therefrom shall be made and certified under the seal of the society

upon application of any person, which person shall pay for such copies reasonable fees established by the society.

9. To require that any state, county, or city, or any public official, deposit official books, records, documents, or original papers, not in current use, which are of definite historical importance, in the society for preservation and to provide methods whereby such materials, which have no significance, may be destroyed.
10. To establish such rules as may be necessary to discharge the duties of the society.
11. To employ such personnel as may be necessary for the administration of its duties in accordance with the rules of the administrator of the division of human resources promulgated pursuant to chapter 52, title 67, Idaho Code.
12. To have and use an official seal.
13. To delegate and provide subdelegation of any such authority.
14. To identify historic, architectural, archaeological, and cultural sites, buildings, or districts, and to coordinate activities of local historic preservation commissions.
15. To serve as the geographic names board of the state of Idaho.

In addition to the duties specified in Idaho Code 67-4126, several divisions of the ISHS also follow regulations set forth in other state and federal statutes.

Idaho State Archives and Records Center

The Idaho State Archives follows regulations set forth in the requirements for county and city records outlined in Title 31 and Title 50, respectively. Title 74 Transparent and Ethical Government contains the Idaho Public Records Act and includes several statutory obligations for records. The archives also relies on the Idaho Public Records Law Manual from the Idaho Attorney General.

State Historic Preservation Office

The Idaho SHPO was established in 1972 after the passage of the National Historic Preservation Act of 1966 (NHPA), as amended (16 USC 70 et seq.). The Idaho SHPO administers the regulations set forth by the NHPA, focusing on seven major areas including: National Register of Historic Places; Certified Local Governments; federal tax incentives; preservation planning; NHPA Section 106 federal project review (36 CFR Part 800); architectural and historic sites survey and inventory; and the archaeological survey and sites inventory. The NHPA and Idaho Code 67-4127A requires a state historic preservation officer to be appointed by the governor to administer the state historic preservation program.

Archaeological Survey of Idaho

Idaho Code 33-3901 through 33-3905, as amended (1992) established the Archaeological Survey of Idaho and placed it under the administrative authority of the ISHS Board of Trustees and University of Idaho's Board of Regents. The ASI Advisory Board consists of the State Archaeologist (a non-voting member); the academic Vice Presidents of the University of Idaho, Idaho State University, and Boise State University or their designated representatives; the Governor of Idaho or his/her designated representative; and a member of the public who shall be elected by a majority vote of the Advisory Board. The ASI program is managed by the State Archaeologist. Idaho Code 33-3901 is summarized as follows:

- It is the policy of the State of Idaho that the archaeological resources recovered from within the state and their associated documentation, be accorded long-term curation within the state to ensure their continued accessibility by the educational programs of the state universities and for the public benefit of the citizens of the state of Idaho.
- It is the policy of the State of Idaho that archaeological inventories conducted within the state be documented in a comprehensive database accessible by educational programs and for other public purposes consistent with the protection of these resources.
- The survey shall be the lead state entity for the compilation, preservation and dissemination of archaeological survey data and long-term curation of collections for Idaho.
- This information is to be acquired through field and laboratory investigations by the staff of the survey and through cooperative programs with other governmental and private agencies, including the educational programs at the state universities which recover, use, and care for archaeological materials.

Capitol Collections

Subsections 3, 4, and 5 of Idaho Code 67-1608, as amended (1998) gives the Capitol Commission the authority to:

3. Review all proposals involving objects of art, memorials, statues, or exhibits to be placed on a permanent or temporary basis in public spaces within the capitol building or on its grounds. All such proposals shall be in conformance with the approved written policies of the commission and implemented with the consent of the commission and

consent of the legislature and governor pursuant to subsections (2) and (3) of section 67–1602, Idaho Code.

4. Work cooperatively with the Idaho state historical society to support a capitol curator to preserve, manage and protect the capitol building, and its historic collections and exhibits. The possession of all historic, restored and new furniture used by the executive department shall be retained by the executive department, and the possession of all historic, restored and new furniture used by the legislative department shall be retained by the presiding officers of the senate and house of representatives. All historic, restored and new furniture shall be inventoried annually, shall remain in the capitol building and is the property of the state of Idaho.
5. For the purpose of promoting interest in the capitol building and obtaining funds to enhance the preservation of original and historic elements of the capitol building and its grounds, to develop and implement a plan for the publishing and sale of publications on the history of the capitol building and to develop other capitol building memorabilia for sale to the public.

Other statutory authorities concerning collections owned and managed by the ISHS include the Curation of Federally Owned and Administered Archaeological Collections (36 CFR 79); the American Indian Religious Freedom Act of 1978 (42 USC 1996); the 1970 UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property (implemented in the United States by PL 97-446 in 1983, 19 USC 2601), Protection of Archaeological Resources, 43 CFR 7; Preservation of American Antiquities, 43 CFR 3; the Antiquities Act (16 USC 431-433); the Archaeological Resources Protection Act of 1979 (ARPA) (16 USC 470 aa-mm); the Native American Graves Protection and Repatriation Act of 1990 (NAGPRA) (25 USC 3001-3013, 43 CFR 10); Idaho Protection of Graves (Idaho Code 27 501-504); Idaho Public Records Act (Idaho Code 74-101 et seq.); Idaho Ordinances – City Code – Records (Idaho Code 50-901 et seq.); Freedom of Information Act of 1966, as amended (5 USC 552); the Privacy Act of 1974 (5 USC 552a); and the Copyright Act of 1976 (17 USC 101 et seq.).

ISHS HISTORY

In 1881, eighteen years after the establishment of Idaho Territory, and nine years before statehood, the Historical Society of Idaho Pioneers began collecting and preserving information about the early development of Idaho. Twenty-six years later, on March 12, 1907, the Idaho State Legislature established the Idaho State

Historical Society. The new organization became the steward of the “literary and scientific artifacts” already collected by the Historical Society of Idaho Pioneers. It was also charged with collecting, cataloging, and preserving materials illustrating the state’s history, including pioneer narratives, documentation of Indian tribes, historical objects, books, manuscripts, pamphlets, and newspapers. John Hailey, a packer, stage line operator, and historian, served as the first secretary and librarian of the Society until his death in 1921. From Hailey’s appointment until 1956, the head of the Society served under a variety of titles, including secretary, librarian, or historian.

Until the ISHS became a state agency in 1907, its collections were housed in the old Boise City Hall on Eighth Street and later in the Boise Carnegie Library. After becoming a state agency, the Society moved collections to the Territorial Capitol, where they were placed on exhibit in the Senate State Historical Room. The Society collections were subsequently moved around the Capitol Mall until they found a home in the new Idaho State Capitol on Jefferson Street. Recognizing the need for a larger permanent facility, the state legislature authorized funding in 1939 to construct the Idaho State Historical Museum building. The new museum, located on the edge of Julia Davis Park, opened to the public in 1950. The museum building housed collections and featured public exhibitions.

On March 12, 1947, the Idaho State Legislature assigned state archival authority to the ISHS (Idaho Session Laws, C.161'47, pp. 416–417). The Society was charged with establishing a unified state archive in order to “preserve and protect the historically important state, county, city, and village archives, and thus facilitate the use of Idaho records for official reference and historical research.” The law further authorized and empowered custodians of records not in current use, but of historical significance to the state, or any county, city, or village, to deliver the records to the ISHS for permanent preservation. The law provided for the certification of such records by the ISHS and authorized the ISHS to require and supervise the collection of historically important archives.

The ISHS hired its first professionally trained Director, H. J. Swinney, in 1956. The Swinney era, which lasted until 1965, marked the beginning of professional development at ISHS. During this period, the ISHS established a membership program, initiated the publications *Idaho Yesterdays* and *The Mountain Light*, created the highway historical marker program, began writing the popular ISHS *Reference Series* for public researchers, and formalized children’s programming at the Idaho State Historical Museum.

As the Idaho State Historical Museum collections grew larger during the 1950s and 1960s, additional storage space was required. In 1968, the state provided funding

to build a larger storage facility, on Rose Street (now Whitewater Park Boulevard) in Boise, to house the expanding collections and allow the main museum building to be remodeled for additional exhibits.

Under the direction of Dr. Merle Wells, the ISHS provided national leadership in the establishment of formal historic preservation programs in the late 1960s. The State Historic Preservation Office (SHPO) was established in Idaho in 1972 and headquartered in the downtown Boise Assay Office. ISHS focused on historic preservation and program expansion during the 1970s and 1980s with the acquisition of the Pierce Courthouse in Pierce (1972); Old Idaho State Penitentiary in Boise (1975); the Hatch House, Doney House, ZCMI Store, and Relic Hall in Franklin (1979-2002); Rock Creek Station and Striker Homesite in Hansen (1984), and expansion of the Idaho State Historical Museum in Boise (1980). Seeking to meet professional standards for excellence, the museum sought and received accreditation by the American Association of Museums (now the American Alliance of Museums) in 1972.

In 1992, the Idaho legislature officially established the Archaeological Survey of Idaho to curate archaeological collections originating in Idaho. The survey traces its roots to the archaeological inventory program created by the Idaho State University Museum in 1958. The oversight of the survey was transferred to the State Archaeologist in 1976, and three repositories were designated to care for archaeological collections and documentation. These repositories continue to operate today and offer long-term curation of archaeological collections and site records within their respective regions. The Eastern Repository is located at Idaho State University and holds archaeological collections and associated records from eastern Idaho. The Northern Repository is located at the University of Idaho and manages collections and associated records from northern Idaho. The Western Repository curates archaeological collections from the ten-county area of southwestern Idaho. It is located at the State Historic Preservation Office, with collections stored at the Idaho State Museum storage facility. The SHPO maintains a database of ALL site records, regardless of which repository collections are housed in.

The ISHS commemorated the Idaho State Centennial in 1990 with enhanced exhibitions at the Idaho State Historical Museum. The Society also served as a leader for the Lewis and Clark Bicentennial between 2003 and 2006. In 2005, the Idaho State Archives and ISHS administration and office of the Executive Director moved to the new Idaho History Center, a purpose-built storage, research, and exhibition facility located next to the Old Idaho State Penitentiary Historic District.

In 2012, under House Bill 599, the Idaho legislature assigned state records management responsibilities to the ISHS (Idaho Code 67-4126, 7.), created the Records Management Services Fund (Idaho Code 67-4129C), and charged the ISHS with developing records management rules, guidelines, and procedures pertaining to Idaho State records management services (Idaho Code 67-4131). The State Records Center manages these responsibilities and remains a separate entity under the management of the ISHS. The State Archives collects only permanent, inactive, records from county, city and state agencies, while the State Records Center collects active records under retention from state agencies primarily.

In 2007, the state began a \$123 million project to renovate, restore, and add two new underground wings to the state capitol building. As a result of this project, the Capitol Collection was established. This collection is managed by the Idaho State Historical Society staff member assigned the title of Capitol Curator (Idaho Code 67-1608). The stored portion of this collection resides in a building next to the Idaho State Museum's storage building. The Capitol Collections storage building was originally leased from the Idaho Transportation Department in 2007 and continues to be leased through 2019. In addition to the Capitol Collection, the building houses the Idaho State Museum's art collection and a portion of the Idaho State Archives collection.

The Idaho State Historical Museum began a complete building renovation and expansion in 2014. The project involved a museum-wide exhibit redesign and installation, and added dedicated temporary exhibits galleries, new classrooms, and public events space. As part of the renovations and rebranding effort, the ISHS Board of Trustees voted to change the name of the Idaho State Historical Museum to the Idaho State Museum in 2017.

SCOPE OF COLLECTIONS

DEVELOPING SCOPE OF COLLECTIONS STATEMENTS

Scope of collections statements, sometimes referred to as collections plans, outline the scope of present and future museum and archival collections acquisitions. They serve as guiding documents to foster consistent and relevant additions to the collection, while preventing arbitrary, excessive, and impractical growth. Following a scope of collection statement ensures that collections contribute directly to the understanding and interpretation of an organization's mission, vision, and interpretive themes.

A scope of collection statement is the primary document guiding staff in determining which materials will or will not be included in the permanent collection. Scope of collections statements typically establish collecting parameters covering geographic area, temporal span, themes, and types of materials. These parameters help staff prioritize collection materials that support the organizational mission and purpose, and are also valuable for research, exhibition, and/or education. Ideally, scope of collection statements should be reviewed and updated every five to ten years.

The departments of the ISHS, which actively acquire new collections, should develop and update department-specific scope of collection statements to be used with the *accession criteria* outlined in this collections management policy, to guide consistent growth of collections. At a minimum, the statements should outline:

- Current collection strengths and weaknesses
- Geographic areas to be included
- Themes or subjects of primary interest
- Temporal periods of interest
- Categories of collections, or types of materials
- Materials that will not be collected

ACQUISITIONS

The ISHS collects and preserves materials that support the Society's mission of preserving and promoting Idaho's cultural heritage, and vision of inspiring, enriching, and engaging all Idahoans by leading the state in preserving, sharing, and using history and cultural resources to help frame the present, and inform and shape the future. Permanent acquisitions are limited to objects and archives that meet the *accession criteria* outlined in this policy, include materials which are truly significant to the history of Idaho, have very well documented provenience/provenance, and have a high potential for use in research, exhibition, or educational programming. Due to limited space and resources, potential acquisitions with poorly documented provenience/provenance, limited importance or significance to the history of Idaho, with little potential for use in research, exhibition and educational programming, will generally not be accessioned into the permanent collections.

ACCESSION CRITERIA

Acquisitions presented to the ISHS will be evaluated by a designated departmental collections committee, archivist, or curator; and, if determined appropriate, will be formally accessioned into the collection, to be held in the public trust and managed according to this collections management policy.

Criteria used to evaluate potential ISHS accessions include the following:

- The objects or archives support the Idaho State Historical Society's mission of preserving and promoting Idaho's cultural heritage.
- The collection fulfills the agency's responsibilities identified in Idaho Code 67-4126, as amended (1970).
 - To encourage and promote interest in the history of Idaho and encourage membership in the society.
 - To collect for preservation and display artifacts and information illustrative of Idaho history, culture, and society.
 - To be responsible for records management services for state government. (To be further defined here by ISA staff.)
 - To accept from any state, county, or city, or any public official, any official books, records, documents, original papers, newspaper files, printed books, or portraits, not in current use.
 - To require that any state, county, or city, or any public official, deposit official books, records, documents, or original papers, not in current use, which are of definite historical importance, in the society for preservation and to provide methods whereby such materials, which have no significance, may be destroyed.
- Objects or archives will not be accepted that are known to have been illegally or unethically collected, contrary to state or federal laws or regulations.
- The donor has the legal authority to transfer ownership of the objects or archives to the Idaho State Historical Society.

Additional acquisition criteria used to evaluate potential Idaho State Museum accessions include the following:

- The objects meet the requirements of the department's scope of collection statement.
- The objects have permanent research or exhibition value based on their historical, cultural, scientific, aesthetic, or associational value.
- The objects are complete and in stable condition. The ISHS will generally not accept collection materials that are seriously damaged, unstable, hazardous,

or oversized, unless funding is obtained to professionally conserve, properly store, or mitigate risks posed by the materials.

- The Idaho State Museum has the capability to store, protect, and preserve objects or archives in perpetuity according to professionally accepted standards.
- The objects have well documented provenance and are deemed to be authentic. Provenance documentation must accompany collections and be retained permanently by the ISHS.
- The title to all objects acquired by gift, purchase, or trade will be obtained free and clear, without restrictions. Title must be conveyed in writing to the ISHS through an agency-authorized deed of gift, bill of sale, transfer of ownership form, receipt for property, or similar document.
- The objects are free of restrictions. Collections with restrictions on use and disposition are avoided to the greatest extent possible. If a designated authority approves an exception, the conditions must be documented fully in writing, and included with the accession record.
- To the extent possible, all copyright interests are assigned to the ISHS. If the donor is not willing to assign all copyright interests, agreed upon terms of use should be clearly stated in writing (e.g. ISHS Non-Exclusive Copyright License Agreement) and included with the accession record.
- The objects do not duplicate existing collection material. Duplicates should be avoided unless there is a compelling reason such as high research, exhibition, or educational use.
- The ISHS complies with the Bureau of Alcohol, Tobacco, and Firearms (ATF) National Firearms Act (NFA) (26 USC 5801 et seq.) regulations when acquiring and storing weapons.
- Materials offered to ISHS that are not considered appropriate to the permanent collections may be accepted as education materials if there is a clear understanding and a signed agreement between the donor and ISHS stating that materials will be utilized for the agency's vision and mission. Complete and accurate records of all such transactions will be maintained.

Additional acquisition criteria that apply to the Capitol Collection are identified in the Idaho State Capitol Building Collections Procedures and Protocols (2017):

- The Capitol can collect and add objects to the Capitol Collection that may include:

- objects that are a gift to the State of Idaho by visiting and foreign representatives;
- objects that are a part of an inherently growing collection due to law (i.e. legislative photographs); or, objects that have been found and/or returned and confirmed to belong to the Capitol Collection.

Additional acquisition criteria used to evaluate potential Idaho State Archives accessions include the following:

Potential acquisitions presented to the Idaho State Archives are evaluated by an archivist or committee. Once appraised and selected, the collection is formally accessioned, held in the public trust and managed by the Idaho State Archives according to professional standards.

- The collection meets the requirements of the Donated Collections Manual or the Government Records Policy of the Idaho State Archives
- The collections are appraised by Idaho State Archives acquisition staff and are deemed to have enduring research value based on their unique, informational, evidential, legal, historical, or cultural value.
- The collection is in stable condition. The Idaho State Archives will generally not accept collections that are seriously damaged, unstable, hazardous, or a pose a storage issue, unless funding is obtained to professionally conserve, properly store, or mitigate risks posed by the collection.
- The collection has a documented provenance and is deemed to be original and/or unique material. Provenance documentation must accompany collections and be retained permanently within the accession file.
- Title to the collection will be obtained and must be conveyed in writing to ISHS through accession paperwork: an agency-authorized deed of gift, bill of sale, transfer of custody, letter of intent, or similar documentation.
- Intellectual Property Rights, Copyright, Custodial History and Restrictions of Use will be discussed and carefully considered during the acquisition process. Conditions of use, the schedule for access and/or restricted access will be documented within the accession paperwork.
- Unsolicited materials offered to the Idaho State Archives as an archives acquisition will be appraised as time allows, if the materials do not meet acquisition criteria the Idaho State Archives reserves the right to dispose of the materials.
- Unsolicited materials offered to the Idaho State Archives for the Merle Wells Research Center vertical clipping files will not be considered acquisitions, will

not be accessioned into donated collections, and will not receive a formal receipt. Inventory at the States Records Center are not considered acquisitions.

- The Idaho State Archives recognizes the need for cooperative efforts between all Idaho archival repositories and will take into consideration established, legacy collections and collection development policies of other repositories collecting the same and/or related subjects. The Idaho State Archives acquisition staff conferences with relevant repositories when questions or concerns with donors and/or collections arise. The Idaho State Archives promotes what is in the best interest of collections by promoting the integrity of collections and by practicing professional ethics.

Additional acquisition criteria that apply to the Archaeological Survey of Idaho repositories are identified in the ASI Curatorial Standards and Guidelines:

- In some circumstances a repository may accept a collection as a gift which transfers title of the collection to the host institution managing the repository. Only those collections which meet the accessioning policy of the regular museum program of the host institution will be considered as potential gifts. Transfer of title must be finalized prior to or concurrently with submission of the collection to the repository.
- In compliance with state and federal laws and regulations relating to human remains, the survey will not collect or retain Native American human remains except for identification, attribution, or legal custody. Such remains will not be accessioned, but will be held in the public trust and repatriated to the culturally affiliated Native American tribe according to the process set forth in NAGPRA (25 USC 3001 et seq.), and Idaho "Protection of Graves" (Idaho Code 27-501 through 504). At the request of the culturally affiliated tribe, human remains may be held on a long-term basis. Culturally unaffiliated remains may be held in the public trust if no tribe makes a repatriation claim.

ACQUISITION PROCESS

Approval

Potential acquisitions will be evaluated by collections staff using the *accession criteria* outlined in this policy. Potential acquisitions will be reviewed and approved by an officially designated departmental collections committee or collections staff, and then accessioned into the department's permanent collection.

Objects or archives received or purchased on behalf of the ISHS by employees, volunteers, Board members, or Foundation members are subject to the *acquisition*

process and *accession criteria* outlined in this collections management policy and must be formally approved by the appropriate collections committee, archivist, or curator prior to acquisition. Staff, volunteers, Board members, or Foundation members interested in acquiring materials on behalf of the ISHS should involve the appropriate collections committee, archivist, or curator early in the process to ensure that formal approval is granted prior to physical acquisition of the object.

Idaho State Museum Process

The Idaho State Museum collections committee approves new acquisitions for the permanent museum collection. This collections committee consists of the Idaho State Museum Administrator, Curator of Collections, registrars (museum and capitol curator), and other collections staff members as appointed. After approval, a collections staff member generates and signs the instrument of conveyance.

Capitol Collection Process

The Capitol Collection is generally not an actively collecting entity. Acquisitions do sometimes occur and may proceed through the following channels:

- A Capitol Commission member brings an object to the larger committee for review and admittance into the Capitol Collection.
- The Capitol Curator brings proposed donations to the Capitol Commission or its designated approving body for final review and approval.
- The Capitol Curator is given authority to review and accept the donation on behalf of the Capitol Commission.

Idaho State Archives Process

The Idaho State Archives approves new acquisitions in compliance with the Donated Collections Manual and/or Government Records Policy.

Archaeological Survey of Idaho Process

The State Archaeologist and Curator of Archaeology evaluate and approve potential acquisitions for the Idaho Archaeological Survey's Western Repository. The Archaeological Survey of Idaho's Northern and Eastern Repositories accept and approve new acquisitions according to their respective collection policies. The Archaeological Survey of Idaho also accepts long-term loans for the storage of state and federally-owned collections. Long-term loans are approved and signed by the State Archaeologist or Curator of Archaeology.

Methods of Acquisition

Collections may be obtained by means of gift, bequest, exchange, purchase, transfer, field collection, or any other legal transaction by which title or custody and object and/or archives passes to ISHS. After approval from the respective department's collections acquisition authority, a legal instrument of conveyance or contract, setting forth a complete description of the materials and the precise conditions of transfer will accompany all accessions, and be kept on file with the respective ISHS departments. Acceptable transfer of ownership or transfer of custody documents include ISHS, or agency-approved, deed of gift, transfer of custody, bill of sale, transfer of ownership form, receipt for property, or similar document or contract. This conveyance will be signed by the donor, seller, or legal representative, and by an authorized ISHS representative.

After materials and their legal ownership or custody are conveyed to the ISHS, collections are accessioned. Accessioning is the formal process of adding objects, archives, or works of art to the permanent collection by means of assigning a unique number that allows the ISHS to connect an object to its documentation. A single accession transaction (with one assigned accession number) is recorded when one or more objects are obtained from one source, at one time, and in the same manner. Each accession will be documented in a standardized format that preserves ownership status, provenance, history, inventory, and a description of each collection. Accession documentation will be maintained permanently by the respective ISHS departments.

Record and retain the following information permanently for each new accession:

- Accession number
- Source of accession (name and contact information)
- Date of accession
- Type of accession (gift, transfer of custody, purchase, exchange, transfer of ownership, field collection)
- Legal transfer of ownership or transfer of custody forms (deed of gift, transfer form, bill of sale, collecting permit)
- Description (item count, inventory, cubic and/or linear feet measurement; provenance/provenience; collection history; custodial history; condition; and/or donor biographical note)
- Project name and site number(s) (archaeological collections)

- Assignment of copyright, or signed copyright license agreement (if applicable)

NON-COLLECTION ACQUISITIONS

Idaho State Museum

Materials offered to Idaho State Museum that are not considered appropriate for the permanent collections may be accepted as education materials. In this case, both parties must reach a clear understanding through a signed agreement between the donor and ISHS that materials will be utilized for the agency's vision and mission, but will not be added to the permanent collection. Complete and accurate records of all such transactions will be maintained. Due to limited time, space, personnel, and funding, the ISHS will not store items for other institutions or individuals..

Idaho State Archives

Unsolicited Materials offered to the Idaho State Archives for the Merle Wells Research Center vertical clipping files will not be considered acquisitions, will not be accessioned into donated collections, and will not receive a formal receipt. The Idaho State Records Center inventory is not considered an Idaho State Archives acquisition.

MONETARY APPRAISALS

The ISHS does not perform, arrange, or pay for monetary appraisals for donors or outside parties. The ISHS follows current IRS regulations concerning gifts and donations to non-profit organizations. These regulations prohibit organizations from appraising tax-deductible donations for donors. If a donor requires a monetary appraisal, such appraisal shall be arranged and paid for by the party requesting the appraisal. Such appraisals must be made by an independent, qualified appraiser. If the ISHS conducts an appraisal for internal insurance purposes, the appraisal will not be shared with the donor.

CATALOGING STANDARDS

Catalog records contain detailed information at the object or archival collection level and include a unique identifying number. They establish intellectual and physical control over objects, and record information concerning description, location, condition, provenance/provenience, and use. Historically, catalog records were written or typed on cards. Today they are entered in databases, with backup physical copies retained. Catalog records follow these general guidelines:

- Each object, group of objects, or archival collection should receive a unique identifying catalog/collection number and label as appropriate to the discipline.
- Collections should be cataloged according to the division the collections are being placed- Museum, Archives, State Historic Preservation, or Capitol.

Idaho State Museum

- Catalog records should include a physical description of the object; its association with people, resources, or events; associated scientific data; and collections management information such as current location and condition.
- Catalog records, whether in paper or electronic format, must be retained permanently. This includes catalog records for deaccessioned objects. Catalog numbers for deaccessioned objects should not be reassigned.

Capitol Collection

Capitol Collection catalog records follow the description and cataloging protocols as laid out in the Capitol Usage Manual.

Object Catalog fields

Record and retain the following fields for object catalog records:

- Catalog/collection number
- Accession number (if different)
- Discipline category and classification
- Object name
- Collection holder identifier (Idaho State Museum, Capitol Collection, ASI)
- Item count or quantity
- Current storage location
- Description
- Condition
- Date cataloged
- Cataloged by
- Status (storage, loan, exhibit)
- Additional fields Idaho State Museum catalog records may include:
 - Object manufacturer/origin (if known)
 - Object date (if known)
 - Place used (if known)
 - Material type

- Marks/labels/inscriptions
 - Dimensions
 - History/provenance (if known)
 - Manila file
 - Condition description
 - Damage and degree of damage
 - Area of weakness
 - Area of loss
 - Previous repairs/modifications
 - Storage recommendations
 - Object number location, barrier coat and top coat, and marking medium
- Additional fields for Archaeological Survey of Idaho catalog records:
 - Smithsonian trinomial
 - Archeocompute Number (if applicable)
 - Field site number
 - Catalog system
 - Catalog prefix
 - Accession year
 - Year collected
 - Modifier
 - Materials
 - Culture
 - Time period
 - General provenience
 - Storage location unit and box
 - Site name and/or place name; within-site provenience, including collection/excavation unit; UTM coordinates, latitude and longitude, or township/range/section; county; state

Idaho State Archives

The Idaho State Archives follows professionally recommended description and cataloguing standards recognized by the Society of American Archivists, American Library Association and Library of Congress i.e. Describing Archives: a Content Standard, MARC21, Dublin Core Metadata Initiative, etc.

DEACCESSIONS

It is the policy of the ISHS to carefully select objects for acquisition that fulfill the mission, vision, scope of collections, acquisition criteria, and legal obligations of the organization. Part of managing a collection and fulfilling public trust responsibilities is periodically reviewing objects to ensure they are still valuable elements of the overall collection. Collections staff periodically reevaluate existing holdings and, unless specific restrictions exist to the contrary, materials no longer relevant and useful to the purposes of the ISHS, and the public it serves, may be considered for deaccessioning.

Deaccessioning is an active collections management tool, which allows the ISHS to refine, focus, and improve its collections. It is the formal process of removing an object from the collection and relinquishing legal ownership of the object. A primary consideration in the deaccessioning process involves determining the method of disposition. Deaccessioning and disposition of collection items will proceed in a legal and ethical manner, following current professional standards, and recognizing the interests of the public and the communities the ISHS serves.

Collection objects will not be accessioned with the *intention* of deaccessioning in the future. Objects that do not fulfill the ISHS mission and acquisition criteria should not be accessioned. Instead the ISHS may refer the donor to a more appropriate institution, which would benefit from the donation. Donated items that are accessioned into the ISHS permanent collections will not be deaccessioned within three years of their acquisition, due to the IRS certifications that would be required on behalf of the donor (26 USC 170).

The deaccession policies outlined here apply only to ISHS-owned collections materials. Collections managed but not owned by ISHS such as Archaeological Survey of Idaho materials, the records housed at the Idaho State Records Center and the Capitol Collection follow different processes. Federally-owned collections, which are stored and managed by the Archaeological Survey of Idaho through loan agreements or memoranda of understanding, are not subject to the deaccession policies outlined here. These collections remain property of the respective federal agency and are subject to the agency's deaccession policies and procedures. The Capitol Collection follows the deaccession process outlined in the Capitol Building Usage Manual (2017).

DEACCESSION CRITERIA

Objects or archival materials may be deaccessioned from the ISHS permanent holdings when one or more of the following conditions exist. Deaccessioning may be proposed when an object, archives collection, or materials is/are:

- Outside the department's scope of collections or incompatible with the mission of the ISHS.
- Beyond the capacity of the ISHS to provide proper care and storage for the object or archives collection.
- Inappropriately accessioned into the permanent collection.
- Unstable and pose a health, danger, and/or safety risk to staff, visitors, or other collections materials.
- Damaged or deteriorated beyond repair and cannot be conserved, digitized, or reproduced.
- Lost or stolen and remains missing for more than two years.
- No longer retains identity or authenticity.
- Duplicated in other collections or is from an overrepresented area in the collection.
- Not useful for research, exhibition, or educational programs in the foreseeable future.
- Accidentally accessioned twice; the second accession record is being removed.
- Required by federal or state law to be deaccessioned, such as repatriation under NAGPRA (25 USC 3001-3013, 43 CFR 10).

DEACCESSION PROCESS

Materials in the collections will be deaccessioned only after appropriate recommendation, review, and approval. The ISHS deaccession process proceeds through the following steps:

- Collections staff prepare a written recommendation. This recommendation includes:
 - Object/collection number and description.
 - Year of original accession (must be three years prior to deaccession).
 - Criteria or reason for deaccession.
 - Proposed method of disposition/disposal.

- Date proposed and by whom.
- Status of object/collection title (ISHS has unrestricted, unencumbered title, or if not, description provided).
- Review of accession records, catalog records, archival description, donor information, and database records.
- Monetary appraisal (if necessary).
- A collections committee, team, or at least two staff members, submits the written recommendation to their department's administrator for review.
- The recommendation is then provided to the ISHS Board of Trustees who approves or disapproves the deaccession and proposed method of disposition in writing.
- If approved, disposition proceeds and is fully documented.
- Documentation of the deaccession and disposition are retained permanently.

DISPOSITION OF DEACCESSIONED MATERIALS

The ISHS acts in a legal and ethical manner that is in best interests of the ISHS, the State of Idaho, and the public it serves when disposing of deaccessioned materials. During the deaccession recommendation and review process, the best method of disposition for the specific object or archives collection will be determined. This method will honor the public trust placed in the organization. Materials may be disposed of through: return to donor (Idaho State Archives materials only), transfer, exchange, sale (Idaho State Museum materials only), or destruction.

Restrictions on the sale of ISHS deaccessioned collection objects include:

1. An appraisal from a qualified appraiser should be sought prior to the sale to ensure a fair and reasonable price is asked.
2. Pursuant to Idaho Code 67-4121 collections will not be sold to finance debt or infrastructure.
3. Deaccessioned material will not be privately sold to any ISHS employee, officer, board member, volunteer, or friends or relatives of ISHS personnel, other than at public auction or public market place.
4. Deaccessioned materials may not be sold in ISHS gift shops.
5. To promote the legal and ethical collection of antiquities, the ISHS will not sell archaeological materials.

6. Monies realized from sales of deaccessioned materials will be placed in a fund for purchasing new objects for the collections or direct care of collections.

Human remains, associated or unassociated funerary objects, objects of cultural patrimony, or sacred objects will be listed in the Federal Register and repatriated according to the processes and requirements set forth by the Native American Graves Protection and Repatriation Act (NAGPRA) (25 USC 3001-3013, 43 CFR 10).

Idaho State Museum:

All ISHS numbers will be removed from the objects after deaccession approval and prior to disposition.

Idaho State Museum methods of disposition include the following, listed in order of priority:

1. Place materials in the ISHS education collections for educational programming.
2. Exchange, donate, or sell materials to another state, federal, municipal, or private tax-exempt institution, where they may serve the public through research, exhibition, or educational uses.
3. If material is unsuitable for exchange, transfer, or sale to another tax-exempt institution, it may be offered for sale to the public. Sales will occur in a manner or market place that best protects the interests, objectives, and legal status of the ISHS and the public it serves.
4. If the material is seriously damaged or is not a good candidate for the any of the previous methods of disposition, materials may be destroyed or donated to a tax-exempt resale shop.

Idaho State Archives:

The Idaho State Archives follows the deaccession process outlined in the Donated Collections Manual and Government Records Policy.

DEACCESSIONING OF RESTRICTED MATERIALS

Whenever possible, the ISHS acquires materials free of restrictions. During the deaccession process, the ISHS must determine that it has clear title, free of restrictions, and is legally free to dispose of the materials. Where restrictions as to use or disposition of permanent collections materials are found, the ISHS will act as follows:

- Mandatory restrictions will be observed strictly, unless deviation from their terms is authorized by a court of competent jurisdiction.

- Materials to which precatory restrictions apply will not be disposed of until reasonable efforts are made to comply with the restricting conditions.

MATERIALS IN CUSTODY

TEMPORARY CUSTODY

The ISHS may temporarily hold materials for the purpose of collection appraisal, identification, examination, or authentication. This typically occurs when staff evaluates potential donations, purchases, or loans. The ISHS does not own, or complete loan agreements, for these objects. They are held temporarily by the ISHS until their evaluation is complete.

When taking temporary custody of materials, the ISHS must have the owner sign a temporary receipt. The owner will receive a copy of the receipt, and the ISHS will keep a copy with the archival materials and/or object(s). Staff will evaluate the materials in a timely manner and then arrange for their return, donation, purchase, or loan. Returned objects/materials will require the owner to sign the temporary receipt stating the object(s)/material(s) were returned. Materials retained by the ISHS require the owner to sign a conveyance of title (deed of gift or bill of sale) or a long-term custody document (incoming loan agreement, repository agreement, or memorandum of agreement).

PERMANENT DOCUMENTATION

The ISHS retains the following collection records permanently:

- Accession records and documentation (including deed of gift, bill of sale, transfer of custody, transmittal, etc.)
- Catalog records and/or finding aids
- Loan agreements for all incoming and outgoing loans
- Deaccession records
- Condition reports, including conservation treatments
- Exhibit files
- Copyright and use agreements

Permanent collections documentation may be recorded in paper or electronic format:

- Electronic collections documentation must be secured and backed up regularly.

- Archival quality, acid-free and lignin-free paper, boxes, and folders ensure the longevity of accession records, legal conveyance, catalog records, finding aids, loan agreements, deaccession records, and condition reports.

Environment has the greatest impact on paper preservation. Permanent paper collections documentation is best protected in secure and environmentally controlled vaults.

COLLECTIONS CARE

The ISHS is committed to providing the best collections care possible afforded by the resources of the agency. The ISHS strives to follow current professional standards when fulfilling its legal and ethical collections management obligations. Both accessioned and borrowed objects are prescribed this professional level of care.

Collections care falls under the direction of the respective ISHS departments. The department administrator delegates collections care to the assigned program manager (curator, curatorial registrar, or archivist) for collections under their management. In carrying out this responsibility, the program manager develops standard operating procedures and utilizes additional ISHS personnel as needed. The department administrators approve procedures providing specific collection care details.

Unresolved questions between program managers and support staff regarding procedures for security, preservation, conservation, registration, inventory, storage, installation, or other activities applicable to a collection will be referred to the department administrator and, if still unresolved, to the Executive Director of the Historical Society. Collections care as described in this section does not apply to the Idaho State Records Center.

COLLECTIONS STORAGE ENVIRONMENT

The ISHS maintains separate collections storage facilities for the Idaho State Museum, Idaho State Archives, Capitol Collections, and ASI Western Repository. Additionally, the Idaho State Museum and ASI Western Repository process collections and store collection records at the main museum building and State Historic Preservation Office respectively. Clean, safe, stable, secure, dark, pollutant-free, and pest-free storage environments are key to the long-term preservation of objects and archives. Additionally, maintaining such storage environments is the most cost-effective means of collections preservation, limiting the need for active conservation treatments. This policy recognizes that fiscal and facility limitations prevent ISHS from adhering to every standard set forth for

collections care, but that staff recognize and are working towards these standards. These environment standards apply to exhibition spaces where collections are displayed with exhibits using the appropriate level of lighting as dictated by collection materials and museum exhibit standards.

The following guidelines identify general professional collections storage standards the ISHS strives to meet on a long-term basis. Specific collections storage standards may vary within ISHS departments based on nationally recommended preservation standards.

Archival Storage Environment:

Environmentally controlled storage has the greatest impact for preserving archival materials. The Idaho State Archives recognizes best practices and professional standards and implements recommendations from the Northeast Document Conservation Center, American Institute of Artistic and Historic Works, and other professionally recognized and peer-reviewed publications regarding preservation.

Artifact/Object Storage Environment:

Temperature and Relative Humidity

- Temperature and relative humidity (RH) are monitored at an appropriate number of locations to document environmental conditions. Records are maintained and reviewed at regular intervals.
- Temperatures are maintained within the recommended range for the predominant materials in the collection as building facilities allow. For most collections in exhibit spaces, this is in the range of 65 to 70°F. Storage spaces are kept cooler (60 to 68°F) if they are not accessed frequently.
- Where HVAC systems with humidifying/dehumidifying capabilities are installed, RH levels are maintained within the recommended range for the predominant materials in the collection. For most collections, this range should not exceed 65% or drop below 20% for a significant period of time, with large fluctuations minimized. Ideally, the RH range is 40%-55% for most museum collections. However, specific acceptable ranges should be developed by each department after monitoring the RH in collection spaces for one year.
- Large fluctuations in temperature and relative humidity are limited to the extent possible. Large fluctuations pose the greatest risk to collections and are mitigated when possible. Through the use of thermostats, temperatures are kept within a reasonable range seasonally and throughout the night and day.

- In storage spaces with limited mechanical controls, mitigation strategies, such as sealed storage cabinets, boxes, and paper or cardboard enclosures are used to buffer against rapid temperature and RH fluctuations.

Light

- Lighting in storage spaces is kept to a minimum level that is safe for staff to access collections. Lighting is turned off when not required for access.
- Levels of visible and artificial light are monitored by the Idaho State Museum to identify current levels, especially in areas where collections are stored on open shelves or displayed in exhibition areas.
- The level and duration of exposure to visible light is controlled when light-sensitive objects are not protected within cabinets or boxes. The following levels are recommended for collections:
 - 50 lux (5 foot-candles) for especially light-sensitive materials such as textiles, furs, feathers, leather, prints and drawings, manuscripts, and photographic negatives and prints.
 - 150 lux (15 foot-candles) for oil and tempera paintings, and finished wooden surfaces.
 - 300 lux (30 foot-candles) for less light-sensitive materials such as stone, metal, ceramics, and glass.
 - UV light of 75 micro watts per lumen. Where this level is exceeded, UV-filtering material is installed over lights to control the exposure levels.
- Objects displayed within exhibits, particularly light-sensitive objects, are rotated to minimize the risk of long-term light damage, which is cumulative and irreversible.

Integrated Pest Management and Housekeeping

- Integrated pest management plans/programs are implemented to control biological agents of deterioration.
- Storage and exhibit spaces are monitored regularly for pests. This includes systematically keeping track of pest activity by routinely inspecting spaces and carrying out a pest trapping program. Insect sticky traps and rodent snap traps are placed in consistent locations; they are collected, recorded, and replaced at regular intervals. Sticky trap content inventories are reviewed and retained to determine baseline pest activity, which will assist in the early detection of an infestation.

- Vulnerable collections are inspected periodically for damage or evidence of pest activity such as live insects, casings, or waste.
- Storage and exhibition spaces are cleaned regularly to prevent the build-up of debris that may encourage pest activity.
- Live plants are prohibited from storage and exhibition spaces.
- Food is prohibited from designated storage and exhibition spaces. Exhibition special events restrict food to specific areas, and floors are thoroughly cleaned afterward.
- New accessions and returning loans have the potential to introduce pests into collections areas. Objects are thoroughly inspected in the designated processing area before being moved into collections areas. If any damage is observed or the object came from an area with suspected pest activity, materials are isolated and treated before being moved into collections areas.

Storage Furniture and Materials

- Storage furniture meets general professional standards, is an appropriate size, and is composed of materials that do not damage collections. Until older wood storage furniture is replaced, shelves are lined with polyethylene foam (or similar inert material) to protect objects from direct contact with wood.
- Cabinets and shelves elevate collections off the floor at least four inches to protect against flooding and pest activity.
- Storage containers are composed of archival, inert, acid-free materials, which protect and support the collection elements.
- Materials are stored according to their needs. Objects are not stacked or crowded, compromising structural integrity. Sensitive materials stored on open shelves are placed in appropriate sized boxes for protection against fluctuating environmental conditions, dust, pest activity, and to provide support for access and handling.
- Supportive mounts are provided to unstable objects, especially those stored on open shelving. Mounts and enclosures include polyethylene foam cavity packing, customized boxes, stockinet "sausages," tissue padding, recessed mat mounts, oversized folders, clamshell boxes, document boxes, etc.).
- Shelves are individually identified and clearly labeled. Boxes are labeled according to each department's requirements.

HANDLING COLLECTIONS

Proper handling is essential to the long-term preservation of collections objects and archives. ISHS staff and volunteers follow professional best practices when physically handling objects and archives. **Only trained staff and trained**

volunteers handle, move, and transport collections. Before beginning work with collections, new employees or volunteers must receive appropriate training in object and archives handling. Each department maintains procedures for handling collections materials.

General archives handling guidelines:

- Having clean, dry hands is the preferred method for working with paper materials and nitrile gloves is preferred for photographic materials and some audiovisual materials such as film.
- Avoid working with archival materials when wearing nail polish or when you have an open cut or wound on your hands, to avoid transference to the materials.
- For transporting oversized folders and archival materials i.e. maps, posters, and blueprints, it is best to carry the oversize material or folder by delicately holding opposite corners, one in each hand and transferring it to a map cart.
- Wear nitrile gloves when handling photographic and audiovisual materials

General object handling guidelines:

- Handle objects as little as possible, and only when necessary.
- Wash hands before beginning work with collection objects.
- Wear white cotton gloves when handling most objects.
- Wear nitrile gloves when handling:
 - objects with oily, abrasive, or other surfaces that attract cotton fibers
 - slippery objects such as glass or ceramics
 - objects with delicate or fragile attachments that might catch or get snagged on cotton gloves.
- Plan your route and make sure there is a clear space to accommodate the object before picking it up and moving it. Cover work surfaces with an archival, inert material such as polyethylene foam or acid-free tissue paper.
- If an object is in a container, lift by the container. When possible, objects should be stored in appropriate sized archival containers so they may be moved without being handled directly.

- Using both hands, pick up and hold objects at their strongest point, such as the base. Do not lift by handles, rims, or protruding points.
- Support all objects while in transit by making use of a carrying tray (for small objects), rigid flat supports (for paper or flat textiles), or a trolley (for heavy or large objects).
- Avoid touching the front or back of paintings, instead use both hands to hold the frame or stretcher bars. Do not rest the front or back of the painting against any other object.
- Always lift furniture by the solid framework and avoid dragging. If necessary, use a dolly or cart.
- Avoid stacking objects unless properly padded or supported.
- Do not eat, drink, smoke, use electronic cigarettes, or chew gum around objects.
- Keep pens and sharp objects at a safe distance from objects.
- Avoid wearing loose or dangling clothing, jewelry, or hair that might catch on the object.

COLLECTION INVENTORIES OR SURVEYS

Periodic inventories promote collections accountability and allow staff to verify the presence, location, and condition of collection materials. Inventories may be conducted by physically checking on all, or a random sample of cataloged collection objects. By conducting inventories at regular intervals, the ISHS demonstrates it has physical and intellectual control over the collections and prioritizes collections accountability. Additionally, inventories allow staff to discover incorrect locations in catalog records, and damage to, or loss of, an object. Due to the size of most collections managed by ISHS departments, annual random sample inventories are the most practical solution for maintaining physical control over the collections, ensuring catalog record locations are correct, and briefly checking on the condition of stored objects, which may not be viewed regularly.

ISHS departments follow inventory procedures developed by their respective collections staff:

- The Idaho State Archives conducts collection surveys to identify basic information about collections and materials they hold, including their quantity, form, location, physical condition, storage facilities, rate of accumulation and associated business processes. The results of these surveys inform the planning of records management. (SAA Glossary <https://www2.archivists.org/glossary/terms/r/records-survey>)

- The Idaho State Museum plans to implement an annual random sample collection inventory beginning in 2018. A 100% collection inventory remains a long-term goal.
- The Capitol Collection conducts a 100% capitol furniture collection inventory at the end of each legislative session.
- The Archaeological Survey of Idaho conducts collection inventories on behalf of federal collection owners at the request of agency officials.

Missing Objects and Archives

If objects or archival materials are not located during an inventory, and are found to be missing, action should be taken. After evaluating the history of the object or archival materials and collections storage area, the following options may be exercised:

- Amend the catalog record to note that the object is missing and the date.
- Consult with the collections committee and/or department administrator/program manager to determine the value and importance of the object. The committee will make a determination as to next steps (catalog record note, deaccession, or report to law enforcement).
- Missing objects or archival materials of high value, especially those that may have been vulnerable to theft, should be reported to law enforcement officials. This will give the ISHS legal recourse if the object resurfaces in the possession of another party, or is recovered by law enforcement.
- Other missing objects, especially those that have been missing for several years, may be deaccessioned from the permanent collection according to the deaccession process outlined in this collections management policy. The deaccession paperwork should be retained permanently, and the catalog number should not be reassigned.
- Missing archival materials or objects should be documented in the collections management software and accession file.

CONSERVATION

The ISHS focuses primarily on preservation by professionally managing collections environments, handling, and storage methods. When an active conservation treatment is the only method of preserving, or restoring an object, the ISHS seeks qualified professional conservators to perform the work or oversee collections staff performing the work. Conservation work will be performed by conservators and

staff members possessing the appropriate training and skills for the specific object type or archival material. Treatments will be fully documented and the records maintained permanently with the object's catalog or accession file. Certain audiovisual materials cannot be conserved and require digitization efforts in order to preserve the information through the creation of digital surrogates.

USE OF COLLECTIONS

The ISHS is committed to fulfilling its public trust responsibilities for preserving collections while promoting access and use. To this end, the ISHS promotes access to collections, encouraging research, publications, and exhibitions, which elevate the profile of the ISHS in the mind of the public, and develop a constituency of scholarly, governmental, artistic, cultural, and community groups who will advocate for continued preservation and management of collections by the ISHS today and in the future. The ISHS allows access to and use of its collections and records in a controlled, professional manner, which protects the physical and intellectual integrity of the collections and records.

USE OF COLLECTIONS

Use of ISHS collections conforms to the following provisions:

- The use supports and fulfills the mission and vision of the ISHS.
- The use is legal and in compliance with privacy and copyright legislation.
- The use does not compromise the physical integrity of the objects/archives.
- Acceptable uses of Idaho State Archives collections conform to Idaho Public Records Law and may include research, exhibition, publication, educational activities and reproductions.
- Acceptable uses of Idaho State Museum collections include research, exhibition, publication, educational activities and reproductions. Responsible uses are encouraged to promote the relevancy of the ISHS collections to the public and the scholarly, cultural, and artistic communities the ISHS serves.
- Use of Idaho State Museum collection items by ISHS staff and trustees are limited to activities that directly support the ISHS mission, vision, and core values.
- Use of collections or facilities for commercial purposes must be approved in writing by the departmental administrator or ISHS Executive Director. Appropriate commercial uses are those that are in keeping with the mission, vision, and legislated purpose of the ISHS and its departments, comply with

copyright and privacy legislation, and ensure the preservation of the materials. Endorsement by the State of Idaho or the ISHS is not implied when collections or facilities are used for commercial purposes.

- Use of original collection items for the sole purpose of personal enjoyment, such as furnishing offices, use as props in theater productions, etc., is prohibited. Use of Capitol Collections throughout the Idaho State Capitol building will conform to the Capitol Commission's *Idaho State Capitol Usage Manual*.
- Human remains, associated funerary objects, or photographs of either shall not be publicly displayed or exhibited out of respect for culturally affiliated tribes, and as required by NAGPRA (25 USC 3001 et seq.) and Idaho Code 27-502.

ACCESS TO COLLECTIONS

The following guidelines govern access to collections:

- Collections may be accessed by ISHS or state employees, researchers, historians, archaeologists, scholars, artists, educators, or members of the public, as long as the access and use conforms with ISHS policies and public records law.
- Interested parties may submit requests to access collections through department collections or reference staff with advance notice.
- Access will depend upon available space, staff, stability of materials, and in the case of archives and government records, the Idaho statutes concerning records and the Privacy Act (5 USC 552a).
- When access for research is granted by the Idaho State Museum, an appointment will be scheduled. Researchers accessing original collection materials or working in collection storage areas will be accompanied at all times. Safe handling procedures will be reviewed with researchers to ensure collection protection. Designated research stations and procedures are developed by each department.
- The Merle Wells Research Center and Lincoln Reading Room are open to the public 11:00 AM – 4:00 PM, Tuesdays through Saturdays. The Idaho State Archives provides access to Idaho state agencies Monday through Friday 8:00 AM – 5:00 PM. Day of requests for archival material must be made to reference staff prior to 3:00 PM. Additional information regarding off-site research and access can be found on the Idaho State Historical Society's website.

- Food, drink, smoking, or the use of electronic cigarettes are not permitted in research or storage areas.
- Personal purses, backpacks, and other bags are not permitted near collections or in collection storage areas. Each department has a check in procedure or area for these accessories.
- Researchers are prohibited from photocopying archival material. The use of personal scanners in the Research Center and Reading Room are also prohibited. The Idaho State Archives offers a variety of safe reproduction alternatives for reference copies as described in the Digital Copy Policy.
- Museum researchers are prohibited from taking photographs of collections objects unless prior arrangements have been made. If photographs are required, a request can be submitted to collections staff and images may be provided.
- Researchers must obtain permission from the ISHS to publish photographs or reproductions of collection materials. Images in the Public Domain do not require permission. Each department has adopted their own procedures granting permission to reproduce and publish. The ISHS makes a reasonable effort to provide publishers with copyright information; however, the burden of copyright legislation compliance falls on the user.
- Collections published or reproduced in print or electronic media require identification crediting the ISHS and/or respective department, the collection number or identifier and the creator, if known.
- Researchers requesting ISHS staff to conduct research on their behalf will be charged after a specified time limit is exceeded, and limits apply. Each department has adopted their own limits.
- Examination or use of the ISHS collection documentation and records will be subject to procedures developed by each department.
- The ISHS cannot typically accommodate research requests for the following collections:
 - collections on outgoing loan (unless the researcher can visit the borrowing institution)
 - unprocessed collections
 - collections too fragile to handle
 - collections currently on exhibit (they will not be removed from exhibit)

ARCHAEOLOGICAL SITE LOCATION RESTRICTIONS

The Archaeological Survey of Idaho and the State Historic Preservation Office manage archaeological investigation records for the state of Idaho including approximately 51,000 archaeological site records, over 33,000 archaeological reports, and approximately 62 linear feet of associated records for archaeological collections managed by the ASI. These archaeological site records, reports, and collections documentation are available to qualified academic researchers or professionals gathering information to evaluate the effects of federal undertakings on archaeological and historic sites. Researchers accessing these records are strictly prohibited from sharing the location specific information contained within these records with anyone other than the researchers authorized employees, unless prior written consent is provided by the Idaho State Archaeologist.

LOANS

Collection loans promote collections use and fulfill the ISHS mandate to provide access. Loans must support the ISHS mission for preserving and promoting Idaho's cultural heritage. Providing wider access to collections also supports the ISHS vision of inspiring, enriching, and engaging all Idahoans by leading the state in preserving, sharing, and using history and cultural resources to help frame the present and inform and shape the future. Loans are arranged for the benefit of the ISHS and the lending or borrowing organization. Loans are governed by written loan agreements, which serve as a contract between lending and borrowing institutions and outline conditions of the loan. Loan agreements must be arranged, approved, and signed by officially designated ISHS department collections staff before materials are physically loaned or borrowed. Loan forms and accompanying documentation are maintained permanently by the ISHS.

OUTGOING LOANS

Outgoing loans are allowed or made for exhibition, research, preparation, photography, conservation, or educational purposes. Outgoing loans may be granted to qualified institutions or organizations for objectives that align with the mission and vision of the ISHS. Outgoing loans will not be arranged with individuals. Departmental policies specify the approval, duration, and terms of each outgoing loan, and outline the criteria needed in order to be considered a qualified institution.

Typically, loans will be granted for up to one year with an option for renewal. Renewal will be considered on a year-by-year basis. Objects that have been on loan for more than five years may be recalled to allow collections staff the opportunity to

assess their condition. Upon successful condition evaluation, objects may be loaned again.

Loans must be requested by an official representative of the borrowing institution in writing. Loan requests will be reviewed by a specifically designated curator, curatorial registrar, or collections committee, who grant approval or denial. If the loan is approved, officially designated department collection staff then generates and signs the formal loan agreement, and sends copies to the borrowing institution to sign. Physical custody of the materials will not be transferred until a loan agreement has been signed by both parties. Outgoing loan agreements will be maintained permanently with other collections documentation by the lending department.

As enacted in the Idaho Legislature, Chapter 26, Title 33, Idaho Code allows for prosecution in cases of failure to return borrowed collections after due notice.

Conditions Governing Outgoing Loans:

- Loans are made to qualified institutions and not to individuals. Loans to individuals are only permitted when the ISHS has contracted for work, such as conservation, to be performed on collection materials.
- Loans must be requested by an official representative of the borrowing institution in writing and be reviewed by an officially designated ISHS curator, curatorial registrar, or collections committee. After approval, an outgoing loan agreement is generated and signed by an officially designated department collections staff member. The physical transfer of materials will not occur until a loan agreement has been signed by both parties.
- The borrower is not permitted to make third party loans.
- Materials may not be used for commercial purposes without prior ISHS approval.
- The borrower agrees to honor copyright restrictions for loaned objects.
- Reproduction rights are not included in the loan agreement and must be obtained in writing from the ISHS. The borrower is prohibited from making reproductions except for photographic documentation for condition reports, educational and fair use purposes, and uses related to the stated purpose of the loan.
- If the materials will be exhibited, published, or otherwise publicly referenced, the borrower will credit the ISHS or the department, as defined by the loan agreement. The borrower agrees to provide a copy of publications resulting from use of ISHS collections.

- Requested materials must be physically stable, and able to withstand packing, shipping, and the intended use.
- The borrowing institution must provide the same level of care that the ISHS provides collections. Borrowed materials will be handled, mounted, and displayed using professional museum and archival standards.
- Damage or loss of loaned materials must be reported to the ISHS immediately. The borrower may not repair or alter damaged materials without prior written consent from the ISHS. The borrower is responsible for costs resulting from the damage, including the cost of conservation.
- No collection materials may be cleaned, restored, or altered for any purposes without prior written permission from the ISHS.
- Consumptive or destructive use of objects must be approved in writing by the ISHS department administrator or Executive Director prior to use. Consumptive or destructive use of archival materials is prohibited.
- The ISHS will determine a method of packaging and shipping that will not damage or alter collection materials. The shipping method will account for the importance, value, and condition of the object. The borrower must adhere to specified shipping requirements.
- The borrower is responsible for obtaining insurance for objects while in transit and for the duration of the loan, as determined by the ISHS. The borrower will provide insurance documentation, upon request, to the ISHS.
- Third-party loans of federally-owned collections held by the Archaeological Survey of Idaho must be approved by the federal agency with collection ownership.

Criteria for Evaluating Borrowing Institutions:

Institutions requesting loaned collection objects will be evaluated individually. They must generally meet the following professional standards:

- Loans are made to qualified educational, cultural, or scientific institutions and not to private individuals.
- If a loan is arranged with a commercial entity, the loan will not create the appearance of commercial exploitation of ISHS collections or bring discredit upon the ISHS.
- Environmental conditions are suitable for the storage and exhibition of the requested museum or archival collections, including appropriate environmental controls, regular housekeeping, and pest control measures. The ISHS may propose substituting lower value collections, or replicas, for the loan.

- Security measures are appropriate to protect the materials from theft and vandalism.
- The borrower is capable of professionally handling, storing, mounting, or displaying the materials according to current standards.
- The borrower prohibits food, drinks, and smoking in areas where loaned collections will be held or exhibited.
- The borrower is capable of carrying out or funding the shipping method determined by the ISHS.
- The borrowing institution is capable of obtaining required insurance for the materials for a period that covers shipping and the duration of the loan.
- The ISHS may require the borrower to provide a facility report before loan approval.

Criteria for Evaluating Objects and Archives:

Collection objects and archives materials must be evaluated before an outgoing loan is approved. A condition report must be completed for each object or archival materials before a loan agreement is signed and before packing and shipping occurs. The following guidelines are used to evaluate collection items to determine if they are suitable for an outgoing loan:

- The material is stable and can withstand packing, shipping, and the intended use without incurring damage. The object is free of cracks, tears, or structural damage that would be exacerbated by the handling involved in a loan. The material may be safely packaged without incurring damage. The shipping method is appropriate for the objects or archival materials to ensure its physical safety and security.
- The material's value or importance is not too extraordinary for the material to be loaned. Key or defining collections or objects, or those needed for frequent research, are generally not loaned. The ISHS may propose substituting lower value collections, or replicas, for the requested materials.
- The intended use is appropriate for the specific material.
- The material is cataloged and photographed.
- The material is not restricted under law.
- Due to the sensitive nature of paper and photograph collections to cumulative and irreversible light damage, reproductions of original materials should be used for exhibition instead of originals. Original paper or photographic materials are generally prohibited from outgoing loans outside ISHS. If original paper or photographic materials are loaned for ISHS

exhibition, the display period should be restricted to six months, and light must be monitored and kept within ranges according to preservation best practices.

INCOMING LOANS

Incoming loans are arranged for exhibition, research, or educational purposes. Incoming loans may come from organizations or individuals for purposes that fulfill the mission and vision of the ISHS. Lending institutions and departmental policies govern the approval, duration, and conditions of incoming loans. Loans are arranged for a specified period of time. At the end of the loan agreement, the ISHS will return loaned objects, or renew the loan agreement if the lender agrees.

The same conditions and care that pertain to outgoing ISHS loans will be applied to incoming loans. Incoming loans will be governed by a loan agreement with the lender, which is approved and signed by the officially designated departmental curator, curatorial registrar, or collections committee.

Conflicts of interest are avoided to the greatest extent possible when arranging incoming loans. If a potential lender is also a staff member or Board of Trustees member, they will remove themselves from the loan approval process and avoid influencing the process.

The ISHS will make public the source of the exhibition funding if the funding comes from the same source as the lender. Anonymity should be avoided where it would conceal a real or perceived conflict of interest or raise other ethical issues.

Conditions Governing Incoming Loans

- The ISHS arranges incoming loans for exhibition, research, and restricted collection storage. Objects borrowed for exhibition shall assist the ISHS with fulfilling its mission and vision and relate directly to the proposed theme or purpose of the exhibit. Objects borrowed for research shall be used for ISHS approved projects.
- The ISHS retains full authority over the presentation and label content of borrowed objects placed on exhibit. While the ISHS retains this authority, the lender will be consulted as to the object's significance, provenience/provenance, and intended display context.
- The ISHS will care for, handle, and protect all borrowed objects with the same professional standards afforded its own collections.
- The ISHS borrows stable objects that can withstand packing, transporting, and the intended use.

- Condition reports are completed upon receipt of an incoming loan.
- The ISHS will report object damage to the lender as soon as possible.
- The ISHS will not alter, restore, or repair any objects without prior written consent from the lender.
- Packing and transportation/shipping will be specified by the lender and agreed upon by the ISHS.
- Insurance coverage for loaned objects shall be specified by the lender. Insurance will be arranged by the State of Idaho, Department of Administration, Risk Management Program. It is the responsibility of the lender to provide values for each loaned object. In the event of damage or loss, the amount payable by the insurance policy will be the sole source of compensation.
- The length of the loan will be specified in the loan agreement. The ISHS will make all reasonable efforts to return the objects, or renew the loan, before the termination date.
- Objects on loan may be photographed by the ISHS for documentation, education, and publicity purposes. The ISHS will observe all copyright restrictions on borrowed objects.
- The ISHS generally does not borrow objects that will be listed for sale. However, if the ISHS hosts a temporary art exhibition with works for sale, it is the policy of the ISHS not to facilitate the sale of or collect a commission or fee from the sale of the works.

REPOSITIORY AGREEMENTS

The Archaeological Survey of Idaho, as authorized by Idaho Code 33-3901 et seq., accepts long-term incoming loans for the curation and storage of federal and state-owned archaeological collections. The ASI follows the provisions set forth in 36 CFR 79, *Curation of Federally Owned and Administered Archaeological Collections*, which outlines procedures and guidelines for managing and preserving archaeological collections. Each incoming collection is governed by a written agreement such as a memorandum of understanding, curation agreement, or loan agreement. These documents specify terms and are signed by both parties. These collections are not incorporated into the accessioned collections; however, they are handled, stored, and otherwise documented in the same manner as ISHS-owned collections.

Collection depositors must contact the ASI repository where collections will be stored when projects are expected to generate collections. Collections must be cataloged, labeled, housed, and thoroughly documented before coming to ASI

repositories. Materials must be prepared according to the standards set forth in the *ASI Curatorial Standards and Guidelines* document (see Appendix B).

Outgoing third-party loans of federally-owned collections from ASI repositories are subject to prior approval by the federal agency. These loans are governed by the loan conditions set forth by that agency.

CAPITOL COLLECTION LOANS

Objects borrowed from outside lenders, for the purpose of display in the Idaho State Capitol building, will be for the benefit of the public. Objects will be displayed in public spaces, and will not be used solely for decoration in private offices. Objects accessioned into the Capitol Collection may be displayed throughout the Idaho State Capitol building in public spaces or private offices. Additional policies related to Capitol Collection loans can be found in the Capitol Building Usage Manual (2017).

COPYRIGHT

The ISHS is committed to following all applicable laws concerning intellectual property. Staff acquiring, using, or providing access to collections will familiarize themselves with the Copyright Act of 1976 and subsequent laws and amendments (17 USC 101 et seq.).

ACQUISITION OF COPYRIGHT

When applicable, the ISHS seeks to acquire copyright at the time of collection acquisition. To the extent possible, all copyright interests are assigned to the ISHS in writing at the time of acquisition. If the donor or seller will not assign all copyright interests, the terms of use or license agreement must be clearly stated in writing (e.g. through the ISHS Non-Exclusive Copyright License Agreement). At a minimum, this should include the right to reproduce the materials for ISHS publications and exhibitions but may also include rights of reproduction for some commercial purposes. This documentation should be retained permanently in the collection's accession records.

Acquiring copyright allows the ISHS exclusive rights to freely reproduce, adapt, distribute, publicly perform, and publicly display works. It also permits the ISHS to grant permission to use.

The ISHS does not need to acquire the copyright for works in the public domain, and may freely reproduce, adapt, distribute, publicly perform, or publicly display the works.

USE OF COLLECTIONS

The copyright law of the United States (title 17, U.S. Code) governs the making of photocopies or other reproductions of copyright material. Under certain conditions specified in the law (17 USC 108), libraries and archives are authorized to furnish photocopies or other reproductions of copyrighted works. One of these specified conditions is that the photocopy or reproduction is not to be "used for any purpose other than private study, scholarship, or research." If a user makes a request for, or later uses, a photocopy or reproduction for purposes in excess of "fair use" (17 USC 107), the user may be liable for copyright infringement. The ISHS reserves the right to refuse to accept a copying order if, in its judgment, fulfillment of the order would involve violation of the copyright law. The granting of permission to publish by the ISHS does not absolve users of materials from securing permission from copyright owners and payment of such additional fees as the owners may require if the ISHS does not own the copyright or if the material is not in the public domain. Applicants assume all responsibility for questions of copyright and invasions of privacy that may arise in copying and in the use made of the photographic copy or digital reproduction.

Reproduction, adaptation, distribution, public display, or public performance of materials for which the ISHS holds the copyright, other than for fair use purposes, must be approved by the ISHS. Departmental protocols dictate licenses, and fees are approved by the Board of Trustees.

The ISHS complies with the Visual Artists Rights Act of 1990 (VARA) (17 USC 106A). In compliance with VARA, the ISHS includes the artist's name when publicly displaying or otherwise making available a work and avoids the use of an artist's name on a work that the artist did not create. Additionally, the ISHS does not intentionally distort, mutilate, or otherwise modify works of art in a manner that would be prejudicial to the artist's honor or reputation.

RISK MANAGEMENT AND INSURANCE

The ISHS recognizes the inherent risks associated with managing collections and seeks to mitigate these risks through responsible collections stewardship, staff training, security, fire prevention measures, emergency operation plans, and insurance.

SECURITY

The ISHS proactively secures collections from vandalism and theft while in storage, on exhibit, and during researcher access. Additionally, the ISHS takes measures to protect incoming loans from security threats. The following measures are implemented to ensure the security of collections in ISHS storage and exhibition buildings:

- Electronic security systems equipped with motion detectors are installed, monitored, and inspected regularly.
- Building entrance keys are restricted to approved staff. Outside reproduction of keys is strictly prohibited. Keys are collected when an employee leaves the agency, and locks are periodically changed.
- Locking cabinets provide an additional measure of protection and are used as frequently as possible, especially for highly valuable collections that are vulnerable to theft. Keys are stored in a locked key box or secure location, which only authorized personnel can access. Access to high security vaults requires signing in/out by all individuals.
- Locking boxes provide an additional measure of protection for archaeological collections managed by the Archaeological Survey of Idaho.
- Researchers, visitors, and non-curatorial staff entering collection storage spaces are escorted or monitored at all times, and are required to sign in and out on a visitor log. Volunteers and interns are also required to sign in and out when working in collections storage spaces.

FIRE PREVENTION

Fires threaten personal safety and pose tremendous risks to museum collections. Serious and irreversible damage to collections occur through combustion, smoke damage, and water damage resulting from suppression efforts. The ISHS works to reduce the threat of fires through fire prevention, detection, suppression, and emergency planning efforts. The following precautions are observed in ISHS collections storage and exhibition buildings:

- Open flames are strictly prohibited.
- Smoking and the burning of incense is prohibited.
- Flammable or combustible liquids are stored in flammable storage cabinets.
- Fire detection systems are installed and inspected annually at a minimum.

- Automatic fire suppression systems are installed and inspected annually at a minimum, with the exception of the historic Assay Office basement and the leased Capitol Collection facility.
- Portable fire extinguishers are installed, mounted, and identified to employees. Extinguishers are visually inspected monthly and receive a maintenance check annually.
- Work and storage spaces are organized and free from accumulations of unnecessary materials that might increase the fuel loads and contribute to the development of a fire.
- Emergency exit doors are clearly marked with lighted signs and are free of obstructions.
- Original paper museum records (accessions, catalog records, loans) should be kept in a locking, insulated filing cabinet with equivalent or better protection that will maintain an interior temperature of less than 350 °F during a one-hour exposure to exterior temperatures of at least 1700°F.

EMERGENCY OPERATIONS

Part of protecting collections from inherent risks is responding to threats and disasters. An emergency operations plan or emergency preparedness policy will greatly aid staff in salvaging collections and recovering from a disaster in timely manner. A disaster preparedness plan was created by the ISHS in 1997. This plan should be updated every five years for relevancy and to ensure that further damage is mitigated should a disaster occur.

INSURANCE

Insurance is an additional measure of collections care taken by the ISHS to protect the agency in the event of damage or loss. Insurance is provided by the State of Idaho under the Department of Administration's Risk Management Program and compensates the ISHS in the event of damage or loss.

Loss or damage to collections will be reported immediately to the department administrator, who in consultation with the ISHS Executive Director will determine if the loss will be reported to the insurance company. If the loss is a result of theft or vandalism, a report should be made to the police department to document the loss and begin the process of recovery or seeking restitution. Complete documentation of the loss should be retained permanently with the object's collection records.

Insurance is typically required for outgoing ISHS loans and is the responsibility of the borrower, unless otherwise specified in the loan agreement. The responsibility for insuring incoming loans falls on the ISHS, unless otherwise specified in the loan

agreement. See the loans section for further discussion of outgoing and incoming loan insurance requirements.

CODE OF ETHICS

All employees of the ISHS are expected to maintain a high standard of honesty, ethics, impartiality, and conduct.

The obligation of the Board of Trustees, employees, and volunteers of the ISHS is to carry out the ISHS mission, and operate within the public trust. Trustees, employees, and volunteers of ISHS must not take advantage of their position or association with ISHS in anyway, including not benefiting personally at the expense of the ISHS, or the community it serves. All parties and individuals, including staff, trustees, and volunteers affiliated with the ISHS must display transparency of action and intent, and maintain integrity so as to warrant public confidence. In all activities, ISHS employees, trustees, and volunteers of the ISHS must act with integrity in accordance with the most rigorous ethical principles. The ISHS code of ethics strives to exceed legal standards for the undertakings of the ISHS. The ISHS requires all trustees, employees and volunteers to abide by its code of ethics, as described in the *ISHS Employee Manual*.

The ISHS is committed to implementing the most professional practices possible, which align with national standards. In addition to the ISHS code of ethics, trustees, staff, and volunteers follow the ethical standards concerning collections set forth by the Society of American Archivists, the American Alliance of Museums, American Association for State and Local History, the Society for American Archaeology, and the American Institute for Conservation of Historic and Artistic Works. These additional ethical codes are based on public accountability, service, and trust, and the preservation, and ethical use of collections and documentation.

CONFLICTS OF INTEREST

Individuals affiliated with the ISHS must refrain from any private or public activity, which might be in conflict with, or appear to be in conflict with, the mission and interests of the ISHS.

Trustees, employees, or volunteers of the ISHS should not knowingly misrepresent the mission, objectives, policies, programs, proceedings or motives of the Idaho State Historical Society.

Loyalty to the ISHS by each trustee, employee and volunteer, must be in accordance with fundamental ethical principles and the ISHS professional obligations as a whole. While every trustee, employee, and volunteer of the ISHS is entitled to personal and professional independence consistent with professional and staff responsibilities, each individual must be aware that in the eyes of the public, no private business or professional interest of an ISHS-affiliated individual can be entirely divorced from the interests of the Idaho State Historical Society as a whole.

A trustee, employee, or volunteer of the ISHS must not compete with the Idaho State Historical Society in collecting; nor may said individual take advantage of privileged information obtained as a result of his/her position, or permit others to make use of information otherwise unavailable to the public for furthering personal interest or gain.

In order to avoid the appearance or potential for conflict of interest, a trustee, employee or volunteer of the ISHS may not purchase or acquire excess equipment inventory from the ISHS.

Occasionally trustees, employees or volunteers of the ISHS may be asked to serve in a professional capacity on boards or commissions in the state. To eliminate conflicts of interest or the appearance of potential for conflicts:

- Such service by trustees should be reported to the Chairman of the Board and disclosed to the entire Board, so that it may be determined whether the activity impairs the trustee's ability to act with total objectivity regarding the interests of the ISHS.
 - If the activity may interfere with decisions made regarding the ISHS on certain matters, the trustee will be required to remove him/herself from the conflicting decision-making process.
- Such service by employees should be reported in writing to the Executive Director, and performed on the employee's personal time except as authorized in writing by the Executive Director.
 - Employees may serve on boards as long as the activity does not impair the employee's ability to act with total objectivity regarding the interests of the ISHS, nor interfere with job performance.
- Such service by volunteers should be disclosed to staff so it may be determined that the activity does not impair the volunteer's ability to act with total objectivity regarding the interests of the ISHS, nor interfere with job performance.

PERSONAL COLLECTING

- A trustee, employee, or volunteer of the ISHS may not compete with the Society in the acquisition of collection materials within the collecting scope of the ISHS.
- This policy excludes the purchase of books and materials relating to the history of Idaho, which are readily available on the open market and which are of no direct interest for acquisition by the ISHS.
- A trustee, employee, or volunteer of the ISHS and their immediate family may not purchase materials deaccessioned from the institution's collections or trade materials from their personal collection for materials from the Society's collections, except when the materials and source have been advertised, and are sold at public auction.
- A trustee, employee, or volunteer of the ISHS may not store personal collections on ISHS property or research personal collections on ISHS time.

DEALING

A trustee, employee, or volunteer of the ISHS may not deal (buy and/or sell objects for profit on a regular basis) in historical artifacts, books or papers, act on behalf of a dealer, accept outside employment from a dealer, or retain or possess any pecuniary interest in a dealership.

GRATUITIES AND GIFTS

State employees shall never solicit in their official capacity any gratuity or other benefit from any person under any circumstances. State employees shall not accept gratuities or other benefits exceeding a total retail value of \$25 within a calendar year from any person who is subject to their legal jurisdiction, or who is likely to become interested in any contract or transaction over which they exercise any discretionary function.

State employees are not precluded from accepting, from time to time, food or beverages consumed at the time and place of receipt from any person with whom they deal in their official capacity. Acceptance of food and drink is subject to a \$50 retail value limitation within one calendar year. These rules apply irrespective of kinship or other relationship with the donor outside of the official status of the state employee, and irrespective of the existence of legal consideration for, or legal entitlement to, the gratuity or other benefit.

- A trustee, employee, or volunteer of the ISHS must avoid the appearance of unethical or compromising practice in relationship with suppliers, contractors and other businesses.

- A trustee, employee, or volunteer of the ISHS is prohibited from soliciting or accepting money, loans, credits, discounts, favors, entertainment, meals, lodging and trips from present or potential suppliers and businesses, which might influence negotiations and purchasing decisions of the Society.
- A trustee, employee, or volunteer of the ISHS shall not solicit or accept tips. These rules also apply to family or household members of a trustee, employee, or volunteer of the ISHS, unless the recipient of any such gift has a relationship with the donor outside of the ISHS, and the acceptance of any such gift will not in any way create a conflict between the trustee's, employee's, or volunteer's personal interests and the interests of the ISHS.

The following exceptions to accepting gifts are allowed: 1) The trustees, employees, or volunteers of the ISHS are allowed to accept an occasional gift of a value less than \$25 per year, as long as such a gift will not impair their judgment or otherwise influence their decision making; and 2) reasonable meals and non-excessive entertainment, while on ISHS official business, may be accepted only in the interest of the ISHS.

POLICY REVIEW

The collections management policy and its implementing procedures are the primary documents ensuring consistency in ISHS collections management activities. The policy should be reviewed and updated every five years to maintain effectiveness and relevancy. Proposed revisions may focus on changes in professional standards, changes to ISHS policy or procedures, updates in federal and state law, and improved clarity and guidance for staff. Collections staff and department administrators make revisions and recommend changes to the ISHS Executive Director, who reviews and then brings before the Board of Trustees. The Board of Trustees provides final approval of the collections management policy.