

# COLLECTIONS POLICY

## Mission Statement

The Beaumont Heritage Society is organized for educational and civic purposes to preserve and assist in the preservation of landmarks,(including but not limited to the John Jay French House), documents, pictures, names, mementos, and instruments of historical value, and to preserve the natural beauty of Beaumont, Texas.

In conjunction with the society's mission, the collections department assists the society by preserving, interpreting, and facilitating access to archival materials and artifacts that support the educational and interpretive goals of the John Jay French House, the Chambers House Museum, and the Beaumont Heritage Society

## Purpose of the Collections Management Policy

The purpose of this policy is to outline the policies and procedures that guide the collections department in the development, interpretation, and care of collections entrusted to the Beaumont Heritage Society.

Through this policy, the collections department for the Beaumont Heritage Society ensures that:

- Its collections are preserved, protected, and accessible.
- Its collections are accounted for and documented in the collections management database (Past Perfect 5). Inventory of the collections will take place biennially.
- Accessioning, deaccessioning, care, and loans of pieces are conducted in a manner that conforms to the Beaumont Heritage Society's mission, complies with applicable law, and reflects high ethical standards of the museum and archival profession.

## Scope of Collections

The Society maintains four collections: the Beaumont Heritage Society Collection (1967-), the French Family Collection (1845-1865), the Chambers Family Collection (1900-2004).

The Beaumont Heritage Society Collection includes institutional materials related to the Beaumont Heritage Society as its own governing body, such as administrative and financial records, community involvement, and curatorial projects. These records include, but are not limited to, meeting minutes, programming pamphlets, and historical research projects of the city of Beaumont, Texas such as S.P.A.R.E.

The Chambers Family Collection comprises artifacts and archival materials associated with the Chambers family members: Charles Homer, Edith Fuller, Ruth, and Florence Chambers. Within this collection are diverse records, encompassing personal and professional correspondence,

financial documents, employment history, details of volunteering and organizational involvement, religious materials, and assorted ephemera that provide a nuanced glimpse into the individual lives of the family members. Artifacts within the collection extend to house decor, furnishings, kitchen equipment, tools, entertainment pieces, and a variety of clothing and accessories.

### Acquisition of Objects

The Beaumont Heritage Society collects within the scope of its three separate collection time frames. The society may acquire new objects for the collection by purchase, gift, or bequest. The society does not accept objects that are not pertinent to the mission statement, submitted without donor information, or which it cannot provide adequate storage and maintain in stable condition.

Final approval of the purchase of an object rests with the Executive Director. Purchases must not pose a conflict of interest. No purchase can be made from a staff member or current board member. The vendor must provide the Society with a receipt or bill of sale.

Acceptance of a restricted gift also rests with the Executive Director. Restricted gifts can only be accepted with the approval of the Executive Director and the conditions must not conflict with the mission of the society.

At the time objects are acquired, as much information as possible regarding the object's history will be collected from the donor. This information will become part of the collection record. All reasonable effort will be made to determine the authenticity and ownership of the object.

No member of the staff or Board may appraise an object for a donor. Obtaining an appraisal is the responsibility of the donor. All donations are tax deductible to the extent allowable under the guidelines of the Internal Revenue Service code.

Upon acceptance of the gift, the Executive Director shall send an acknowledgement and *Deed of Gift* to the donor. The gift will be processed into the collection after the donor returns the *Deed of Gift* form. If the donor fails to return the *Deed of Gift* after five attempts by the museum staff to obtain it (including sending a copy by registered mail/return-receipt requested), the gift shall be processed into the collection if there is a written record from the donor that expresses interest to donate the item and the Board formally accepts the item at a meeting. A record is kept of all attempts to obtain the signed *Deed of Gift*.

A *Deed of Gift* is not drawn up for items acquired by bequest; the will establishes the Society's right of ownership to the object(s). Beaumont Heritage Society should receive a certified copy of the will and issue a receipt for the bequeathed object(s) to the executor of the estate. If the Executive Director chooses to accept only a portion of the bequest or refuse it, the Heritage

Society must notify the executor of the estate in writing and sign a partial or full renunciation. The renunciation and all documents and correspondence relevant to the bequest must be kept on file.

### **Artifact Accession Procedure**

Artifacts are defined as items shaped by human hands that exhibit historical or cultural significance. The accessioning process of artifacts involves documenting the characteristics, provenance, and historical details of these items through an Artifact Accession Form, Accession Number Log, Donor form (if applicable), and researched information stored in a corresponding file for each item.

Excellent: Item intact, no imperfections, looks new, serves its function.

Good: Item intact, few cosmetic imperfections, can still serve its function. Just needs to be cleaned and rehoused as necessary.

Fair: Item mostly intact, signs of wear and tear, needs moderate cleaning, imperfections impede on its operability as an item, minor

Poor: Item is falling apart, does not serve its intended function, heavy deterioration

Each Artifact will be accessioned using the Artifact Accession Form (Appendix "A") and the following procedure:

1. Evaluate the item and measure its length, width, height, and diameter in centimeters (CM). Describe the item's characteristics (materials, uses, colors). Evaluate the object's condition (Excellent, Good, Fair, Poor) and record the number of item(s). Note any additional characteristics (e.g. Maker's mark, manufacturing location, graffiti, etc.). Record this information on the Artifact Accession Form.
2. An accession number will be assigned to the item following the previous recorded accession number. Enter the number on the item's Artifact Accession Form and Accession Number Log on Google Sheets, located on the BHS Google Drive.
3. Photograph the object from all angles. Upload the photos into the BHS Google Drive.
4. Stabilize the object using best practices including noting if the object requires cleaning and minor repairs.
5. Prepare the object for storage and record its location on the Accession Form to be later filled in on Past Perfect.
6. Enter information recorded on the Artifact Accession Form into PastPerfect. Upon logging in, locate the Accession tab. Click on "New Record." Enter the object's Accession number and Source ().
7. Rehouse the object using best practices.
8. Assign a file folder to the accession form. Record the accession number on the file. Place the accession form inside the folder.

9. Notify the Collections Manager that the Accession has been completed for the item(s).

### **Archival Accession Procedure**

Archival materials include documents, correspondence, recipes, ledgers, photographs, newspapers, magazines, artwork, and their digital equivalents. Accessioning is a formal process that transfers physical and legal custody of items to a repository, with the action documented for both parties as a receipt. This receipt is a document that contains the initial scope and contents of the material and provides preliminary information that is then used as the basis for the provenance of the acquired collection.

Following the acquisition of the collection, the Archival Accession Form will be utilized to comprehensively document the accession, evaluate the collection (considering its extent, restrictions, etc.). The Archival Finding Aid Template will then be used to outline the arrangement and description of the said collection before processing can begin. The Archival Accession Form can be seen in Appendix “B,” and an example of the Archival Finding Aid Template in Appendix “C.”

### **Retention**

A limit of two copies for any given archival item will be maintained unless specified otherwise. The Collections Department has the authority to digitize or reformat materials for preservation purposes while preserving the original item. Aligned with the BHS society, the Collections Department maintains the right to practice records management. This involves removing materials that are deemed unnecessary, such as duplicates or other assorted records that do not align with the society's mission statement and scope. The sale or transfer, directly or indirectly, of a deaccessioned object to anyone associated with the deaccession process, including but not limited to members of the Beaumont Heritage Society Board or staff or their immediate family members, is strictly prohibited.

### **Deaccessioning**

#### **French Family Collection**

An object may be considered for deaccession if it is no longer relevant to the mission statement or the condition is so poor that the object is beyond repair and has no educational or aesthetic value. The Executive Director may recommend an object for deaccession to the board. Deaccession may occur through sale or exchange, or witnessed destruction if the item is beyond repair. All deaccessions require majority vote of the board. In no case shall objects from the collection be deaccessioned or disposed of in order to provide financial support for institutional operations, facilities maintenance, or any reason other than acquisition of new objects or for the direct care of objects remaining in the collection. The sale or transfer, directly or indirectly, of a

deaccessioned object to anyone associated with the deaccession process, including but not limited to members of the Beaumont Heritage Society Board or staff or their immediate family members, is strictly prohibited.

### **Chambers Family Collection**

Per the Bill of Sale dated January, 11, 2005, no part of the Chambers Family Collection may be sold or transferred without the prior written consent of the C. Homer and Edith Fuller Chambers Foundation. The agreement also states that the Foundation retains a reversionary interest in the Chambers Family Collection. The sale or transfer, directly or indirectly, of a deaccessioned object to anyone associated with the deaccession process, including but not limited to members of the Beaumont Heritage Society Board or staff or their immediate family members, is strictly prohibited.

### **Beaumont Heritage Society Collection**

Materials may be considered for deaccession if they are no longer relevant to the mission statement, are in poor condition, or exist as excessive duplicates of records. Archival records that exist as copies of one another are allowed to be weeded as deemed necessary by the Collections Department. The sale or transfer, directly or indirectly, of a deaccessioned object to anyone associated with the deaccession process, including but not limited to members of the Beaumont Heritage Society Board or staff or their immediate family members, is strictly prohibited.

### **Deaccession Procedure**

The Collections Manager shall provide the board with a complete *Deaccession Report*, which contains the reason for deaccession, a description of the object, proof of clear title to the object, name of the donor or original purchase price, date of acquisition, estimate of current value, and comments on the effect of disposal on the interpretive program. After it has been determined by the board that an object meets the criteria above, it may be deaccessioned.

Any collection item without a clear proof of title or deed of gift should be disposed of according to Texas [Property Code Title 6A Property Loaned to Museums Chapter 80: Ownership, Conservation, and Disposition of Property Loaned to Museums](#).

Unless damaged beyond repair, all deaccessioned objects must be sold through a reputable auction house or similar public venue. A deaccessioned object may be exchanged for an appropriate object owned by another museum or similar non-profit institution with the approval of the board. An appraisal of all objects must be obtained prior to the exchange. Funds from the sale of collections may be used for the acquisition of collections, or the direct care of preservation of existing collections. Funds should not be used to provide financial support for institutional operations.

Objects may be disposed of by witnessed destruction if they present an immediate hazard to the rest of the collections or are damaged beyond repair.

A complete and permanent record of the circumstances and final disposition of each deaccessioned object, whether sold, exchanged, or destroyed, shall be kept on file.

## **Loans – Incoming and Outgoing**

### **Incoming Loans**

All objects accepted will be described in the *Incoming Loan Agreement*, specifying the terms, use, insurance, care, and duration of the loan. Incoming loans may be arranged by the Executive Director. No object on loan to the Beaumont Heritage Society shall be loaned to another organization. Evidence of damage to an object at the time of receipt or while in the custody of the Beaumont Heritage Society will be documented and reported immediately to the lender. The lender must certify that a loan object is in such condition as to withstand ordinary strains of packing and transportation. The costs of necessary conservation, packing, and transportation shall be decided on a case-by-case basis. No object on loan to the Beaumont Heritage Society may be photographed without the express written permission of the owner.

### **Outgoing Loans**

An object shall be loaned only to qualified museums, educational, or cultural institutions where safe custody and exhibition of the object can be assured. Outgoing loans must be approved by the Executive Director. An object may be loaned out if its removal from the collection will not diminish the interpretive programs of the Chambers or French Houses and the object is in stable condition and will not be damaged by packing or transportation. The borrowing institution must provide the Heritage Society with proof of insurance and assurance to safeguard the object while in transit and during exhibition, in accordance with acceptable professional museum standards. The loan must be for a stated purpose and specified period of time. The loan must be credited to the Beaumont Heritage Society. The borrowing institution must sign an *Outgoing Loan Agreement*. The costs of necessary conservation, packing, and transportation shall be decided on a case-by-case basis.

### **Care of the Collections**

It is the responsibility of the Beaumont Heritage Society to ensure that the collections pass on intact to future generations. Everything possible shall be done to prevent ongoing deterioration and destruction. To this end, the immediate care rests with the museum staff, which shall be vigilant in the overall care and conservation of the collection. The National Park Service maintains an up to date Museum Handbook which details the proper handling, storage, documentation, and inventory of the collections. This may be viewed at <https://www.nps.gov/museum/publications/handbook.html>.

A comprehensive *Emergency and Disaster Plan* shall be established for the protection of the public, paid and unpaid staff, collections, and site. Both museums shall be equipped with intrusion, fire detection, and environmental control systems.

### **Records**

Museum staff shall record all acquisitions in an Accession Log that shall be maintained in a file located on the BHS Google Drive. Each object shall have an object file and shall be entered into the collections database (currently PastPerfect 5). Each object must include an accession number, object name, location, photograph, and short description. Electronic records must be backed up regularly. Object files should be kept in a separate building from the database.

Archival collections will include donor agreements, an Archives Accession Form, and an Archival Workflow plan. Note that Archival Collections are subject to time and funding constraints, leaving parts of collections unprocessed. While collections are unprocessed, they will still have donor agreements and an Archives Accession Form.

### **Inventories**

Museum staff shall conduct an inventory of the collections once every two years and confirm the existence and location of each object. At this time, each object should be assessed for maintenance and conservation. If the needs of an object exceed the capabilities of museum staff or facilities, the Executive Director shall make arrangements for treatment of the object by an appropriate professional.

If an item appears to be missing, staff should immediately begin an on-site search. If the object cannot be located, the Executive Director should be notified.

### **Access to the Collections**

The Beaumont Heritage Society is responsible for safeguarding the collections and therefore may regulate public access to the collections and records pertaining to them. The collections and object files shall be accessible for legitimate study, research, inquiry, and examination by responsible parties. Access will be limited to established hours and professional staff availability, conservation consideration, exhibition, and loan requirements. Requests for access to the collections or object files shall be approved by the Executive Director. Museum staff shall record in the object file any published image or other information relating to the object.

Individuals requesting access to the collections shall be supervised at all times, unless specific approval is granted by the Executive Director. Examination shall be restricted to designated areas. Access to storage areas by the general public shall not be permitted without written approval of the Executive Director and a member of the staff must be present. Access to loans shall only be granted if the lender has granted such access in writing.

No commercial or promotional use of collections or information and images will be allowed except with express written permission of the Executive Director. Access to and use of the collections and records shall be credited appropriately in all publications, exhibitions, and other presentations.

Information relating to donor-requested anonymity or governed by the statutes that restrict public access to certain information may be restricted or denied for security reasons. In such cases, the individual requesting access shall be informed of the reason for the restriction or denial of access.

Copies of this *Collections Management Policy* shall be available to the public upon request.



Date: \_\_\_\_\_

**Beaumont Heritage Society**  
**Collections Department**  
**Artifact Accessioning Form**

<b>Accession Number</b>	
<b>Artifact Name</b>	
<b>Description</b>	
<b>Length</b>	
<b>Width</b>	
<b>Height</b>	
<b>Diameter</b>	
<b>Condition</b>	
<b>Number of Item(s)</b>	
<b>Notes</b>	

## Appendix B

### Beaumont Heritage Society

#### Collections Department Archival Accession Form

Please fill in all sections or make a note where information is not available.

<b>Collection Title:</b> Click here to enter text.		<b>Date Accessioned:</b> Click here to enter a date.	
<input type="checkbox"/> New collection <input type="checkbox"/> Addition to collection		<b>Accessioned by:</b> Choose a name (or type one in).	
<b>Type of Acquisition:</b> <input type="checkbox"/> Donation <input type="checkbox"/> Transfer <input type="checkbox"/> Purchase <input type="checkbox"/> Deposit		<b>Accession Number:</b> Click here to enter text.	
<b>Donor/Source Name and Contact Info:</b> Click here to enter text.			
<b>Acquisition date:</b> Click here to enter a date.		<b>Collection area:</b> Choose an item.	
<b>Brief Description:</b> Click here to enter text.		<b>Inclusive Dates:</b> Click here to enter text.	
<b>Physical Description (incl. material types):</b> Click here to enter text.		<b>Extent (linear feet or number/type of boxes):</b> Click here to enter text.	

**Restrictions (or check here for no restrictions: ):**

**Click here to enter text.**

**Storage Location(s):**

**Click here to enter text.**

**Notes:**

**Click here to enter text.**

**Attach inventory or preliminary inventory if available (optional).**

## Appendix C

### **BHS Archival Finding Aid Template**

Beaumont Heritage Society

Collections Department

[Collections@beaumontheritagesociety.org](mailto:Collections@beaumontheritagesociety.org)

409-832-4010

#### **DESCRIPTIVE SUMMARY**

**Creator(s):**

**Title:**

**Dates:**

**Accession Number:**

**Abstract:**

**Extent: linear feet (? boxes), ? oversized papers folder/box (OP), ? bound volumes (BV), and ? oversized bound volumes (OBV)**

**Repository:**

**Language Note: Materials entirely in English.**

**Biographical Note:**

**Scope and Contents:**

**Subject Terms:**

**Arrangement:**

#### **ADMINISTRATIVE INFORMATION**

**Restrictions on Access:**

Unrestricted access

Special restrictions apply: Researchers must contact the Beaumont Heritage Society in advance to access this collection.

Special restrictions apply: Use copies have not been made for audiovisual material in this collection. Researchers must contact the Beaumont Heritage Society at least two weeks in advance for access to these items. Collection restrictions, copyright limitations, or technical complications may hinder the Collections Department ability to provide access to audiovisual material.

Special restrictions apply: Researchers must contact the Beaumont Heritage Society in advance for access to unprocessed born digital materials in this collection. Collection restrictions, copyright limitations, or technical complications may hinder the Collections Department ability to provide access to unprocessed born digital materials.

**Terms Governing Use and Reproduction:**

All requests subject to limitations noted in departmental policies on reproduction.

Special restrictions apply:

**Related Materials:**

**Custodial History**

**Acquisition source:**

**Citation:**

e.g . [after identification of item(s)], **[add title statement]**, Beaumont Heritage Society Collections Department, C. Homer and Edith Fuller Chambers Charitable Foundation.

**Processing:**

Arranged and described at the series level by **[name of archivist]**, **[date]**.

**Collection Guide**

**Series1**

**[Title statement, date span]**

**Scope and Content Note**

**Arrangement Note**

