



COLLECTIONS POLICY

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SOUTHERN OREGON HISTORICAL SOCIETY

Collections Policy

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I. STATEMENT OF PURPOSE

The mission of the Southern Oregon Historical Society is to make history come alive by collecting, preserving, and sharing the stores and artifacts of our common heritage.

ORS Chapter 358 states that a historical society in the state of Oregon may be incorporated for purposes that include the acquisition and preservation of historical objects, real and personal property of historical interest, and other records, material, and data. In addition to these basic responsibilities, the Southern Oregon Historical Society, Inc. (hereafter referred to as the Society), shall cause to be placed on public display objects of historic interest, with appropriate interpretation and background information; shall encourage public accounting of its acquisition and conservator rules and regulations, and of the safeguards established for the collections; and shall conduct a program of public education within its fields of competence, and issue and publish appropriate books, newsletters, and other materials in furtherance of the Society's purpose.

The Collections Policy establishes guidelines for the acquisition, preservation, use and disposition of the historical collections of the Southern Oregon Historical Society, and serves as a basis for the specific collections management policies and procedures detailed in the Society's Collections Manual.

II. RESPONSIBILITY

A. Staff & Board of Trustees

The Executive Director of the Society is responsible for implementing the Board of Trustees' policy decisions by, among other things, administering and preserving the collections and the associated records. The Executive Director shall draft and put into practice necessary regulations and procedures to govern the day-to-day conduct of collections-related activities, and shall have the authority at his or her discretion to assign all or some of his or her responsibility stated in this policy to designated professional staff. In the absence of an Executive Director, the Board of Trustees has the authority to reassign all or part of the responsibilities outlined in this policy to designated staff members.

B. Collections Committee

A Collections Committee will make recommendations regarding the Society's collections related activities, and provide the opportunity for interested parties to share information about potential acquisitions, deaccessions and other matters related to the care and use of the Society's collections. The Committee will consist of voting members to include the Executive Director, Curator of Collections, Associate Curator of Collections, Exhibitions Curator, Archivist, Registrar and others appointed at the discretion of the Executive Director to include a minimum of one Board member and one community representative.

The committee will keep a record of its proceedings and open its deliberations to all interested staff, board members and members of the general public.

The Collections Committee will meet once monthly to make recommendations regarding:

1. New acquisitions
2. Deaccessions from the permanent collections and disposal methods
3. Actions to ensure the proper care, documentation and exhibition of the Society's collections

Decisions made by the committee will be determined by a majority vote. The Executive Director refers acquisition and deaccession decisions made by the Collections Committee to the Board of Trustees for final approval. The final decision on acquisitions and deaccessions shall be made by the Board of Trustees, and shall take into account the recommendations of the Collections Committee.

III. SCOPE of COLLECTION

The Society shall collect and preserve objects and research materials that relate to or are representative of the scope and diversity of human experience in Jackson County and Southern Oregon. Priority shall be given to actively collecting and maintaining a General History Collection that is reflective of this region's past.

The Society maintains three primary collections:

A. General History Collection

The General History Collection is considered the permanent collection of the Society. This collection is accessioned and consists of three-dimensional and archival material considered significant to the history of Southern Oregon or a worthy example of an object(s), three-dimensional and archival, similar or identical to those commonly used in this region. Removal of objects from this collection shall be subject to the deaccessioning process detailed in Section VI of this document.

The **Historic Register Collection** is an additional subcategory of the General History Collection that consists of three-dimensional and archival objects considered to have significant hands-on interpretive value and/or which require periodic use to maintain its condition, such as vehicles with engines. With the approval of the Executive Director or his/her designee, accessioned objects may be moved into or out of this sub-category and into the General History Collection without being deaccessioned. In caring for this collection, a reasonable effort will be made to store the artifacts in an environmentally controlled and secure area. Curatorial, maintenance, repair and photographic records will be maintained. Repair, restoration and maintenance work on the objects will be carried out with the approval of the Executive Director or his/her designee. Trained interpretive staff or volunteers acting under the direction of the Executive Director or his/her designee will carry out the handling and exhibition of the Historic Register Collection.

B. Education/Prop Collection

This collection consists of non-accessioned three-dimensional and archival material. Objects in this collection have not been accepted into the General History Collection and are non-accessioned property because they do not meet the collecting criteria or have been purchased or donated to be used as hands-on artifacts in the Society's educational and interpretive programs. The objects consist of both reproduction and vintage items and are considered expendable objects and are not subject to the strict handling and care procedures or to the acquisition and disposal requirements of the objects in the General History Collection. Reasonable effort will be made to store and handle objects in this collection in a careful manner that will not unduly accelerate deterioration. Objects in the non-accessioned collection are generally marked with the word "Prop" or the letter "P" in front of a three-part number.

C. Library Non-Accessioned Collection

This collection consists of materials given to the Society or collected by staff for the purpose of providing useful information. This collection excludes materials that are considered historically significant, unique or intrinsically valuable. The Archivist determines whether an item is treated as a non-accessioned item immediately, or if it is first presented to the Collections Committee for consideration. This collection is limited to the following:

1. Published materials, including books, pamphlets, CDs and DVDs, if the specific copy received is rare due to age and subject or otherwise unique. Unique items are referred to the Collections Committee for decision.
2. Digital or photocopied histories of families, businesses, events, etc. if the donor specifies it is a contribution for the non-accessioned collection (a donor file is not maintained).
3. Any newspaper clippings that are not part of an accessioned collection, such as a scrapbook.
4. Photographs that are reproduced by the Society's Library from prints loaned to us for this purpose (whether they are saved only digitally or a print copy is generated).
5. Photographs that are given to the Society in electronic format only.
6. Materials that were reviewed by the Collection Committee and selected for informational value only.

IV. ACCESS to COLLECTIONS

Access to the collections will be strictly controlled and carefully monitored by the Executive Director or his/her designee. The Society will generally provide reasonable access to objects or documents that are not on public display for the purposes of study, research and reproduction with a reasonable amount of advance notice and approval of the Executive Director or his/her designee. Such requests are subject to considerations of security and the Society's financial and physical ability to accommodate such requests. The Society reserves the right to charge a reasonable fee when providing an object or document for any purpose. Rules, guidelines and fees shall be established that follow recognized professional standards regarding access to the collections.

V. ACQUISITIONS and ACCESSIONS

Objects or documents may be added to the collections by means of gifts, bequests, purchases, exchange with other nonprofit institutions or any other transactions by which title to the objects or documents passes to the Society. Accessioning is the formal process used to accept and record an object or documents as part of the Society's collections.

A. Acquisition Criteria

In establishing criteria for determining whether an object or document should be added to the General History Collection, the following points shall be considered in no particular order:

1. The material is consistent with the Society's current collecting goals.
2. Materials so unique that they present an exceptional opportunity for the Society may be given consideration.
3. Objects or documents offered for sale will not be acquired if they, or comparable examples, may be obtained by gift or bequest in the future.
4. The Society must have the resources to properly care for the proposed acquisition. There must be adequate space to properly house and adequate staff time to properly

process the items being considered. Storage, maintenance and/or conservation can be appropriately met given current and reasonable expectations of future Society resources.

5. The potential acquisition has potential use for research, exhibition, education or other forms of public outreach.
6. The historical significance of the material is relevant to the Society's mission.
7. Acquisitions should occur without donor restrictions. As a general rule, objects or documents shall not be accepted with attached conditions but may be considered when in the best interest of the Society's fulfillment of its mission. The Society must strictly observe all restrictions or conditions related to use or disposition of any object or documents in its collection.
8. Copyright and other intellectual property rights (patent, trademark, or trade secret) will be transferred to the Society when possible. If the item is restricted or encumbered, an effort will be made to obtain a license to exploit or a waiver of rights from the holder of the intellectual property rights.
9. The material offered for donation must have clear title. A legal instrument of conveyance should accompany all acquisitions and must be kept on file at the Society.
10. No objects or documents should be accepted unless they are destined for a particular collection. Exceptions to this rule should be rare and will be granted only after careful consideration, which includes satisfactory arrangements for disposition of unwanted objects or documents that are not accepted into a collection (such as a trade with another nonprofit institution.)

B. Special Considerations

It is sometimes impractical to evaluate all material at the time of acquisition. Upon evaluation, some material may be declared expendable. This situation may hold particularly true of large collections destined for the Research Library and should be considered part of the normal course of acquisition processing, not of deaccessioning.

C. Compliance

1. No human remains or associated grave goods will be accessioned into the collections in accordance with ORS Chapter 97.745.
2. The Society will not acquire, by any direct or indirect means, an object or document it has reason to believe has been unethically or illegally collected or that has been collected in violation of international agreements or federal, state or local laws, including but not limited to the Native American Graves Protection and Repatriation Act (NAGPRA).

D. Unsolicited Anonymous Donations

The Society will not accept unsolicited anonymous donations, which will be defined as items left in person or delivered through the mail for which prior arrangement has not been made and/or for which no contact information can be ascertained. Unsolicited donations will be considered abandoned and the Society reserves the right to dispose of such property as it deems appropriate. Unsolicited donations do not fall under the definitions outlined in ORS 358.415 (Appendix B) and are thus not subject to the required disposal procedures. In the case of objects of extraordinary historical, cultural, artistic, scientific or monetary value, items will be presented to the Collections Committee who may approve such donations.

The above policy and definition do not apply to items that have been found in collections or library storage, processing or exhibition areas and for which there is no discoverable

documentation; these items should be addressed according to the Society's Found in Collection policy (Section VII, Part B) and Oregon State statues regarding loans to museums (Appendix B).

VI. DEACCESSIONING

Just as selectively acquiring new materials is essential to build and strengthen the Society's collections, it is also important and necessary to periodically reevaluate the existing holdings and to remove materials from the permanent collections. Deaccessioning is the term used to describe the process of removing an accessioned object or document permanently from the General History Collection. This process should be cautious, deliberate and ethical. All decisions concerning deaccession must be presented to the Collections Committee and approved by the Board of Trustees.

A. Deaccession Criteria

The Society may determine that some objects or documents in the General History Collection may be deaccessioned. Material to be considered must meet at least one of the following criteria:

1. The material is no longer relevant and useful to the purposes and activities of the Society.
2. The Society is unable to preserve the object or documents properly.
3. The material lacks physical integrity (it is broken or in poor and unsalvageable condition) or it has deteriorated to the degree that it cannot be used for exhibition or research purposes.
4. The material is duplicate in that the Society's collections contain other examples of the same type of material that are sufficient or better suited to the needs of the Society.
5. The material constitutes a physical hazard or health risk to staff, the public or other collections.
6. The material is culturally appropriate for and would be better preserved and managed in a more suitable repository.
7. It is discovered that the material has an unethical or illegal provenance.
8. The material is determined to be out of compliance with state and/or federal legislation.

These considerations may also apply to real property owned by the Society.

B. Restrictions

Before material from the Society's collections are recommended for deaccessioning, reasonable efforts shall be made to determine whether the Society has the legal authority to do so. The Society will ascertain and document that:

1. The Society holds clear legal title to the material. Objects or documents that the Society does not have full title to might not be eligible for deaccessioning except in accordance with ORS 358.420.
2. There are no restrictions on use or disposition attached to the material. Such restrictions might not allow an object or document to be deaccessioned. Any questions concerning restrictions on objects or documents should be referred to the Society attorney.
3. In the case of material without documentation, the Society will presume ownership after a good-faith effort to locate relevant documentation in accordance with ORS 358.420 to 358.440.

Recommendations for deaccessioning will be made by the Society's collections staff. Such recommendations will be reviewed by the Collections Committee and presented to the Board of Trustees. The Board must approve the recommendations before the deaccessioning can occur.

C. Disposition

The manner of disposition chosen shall be in the best interests of the Society, the public it serves, the public trust it represents in owning the collection and the scholarly and scientific communities it represents. The Society's collections staff will recommend a method of disposal along with the recommendation for deaccessioning for consideration and judgment by the Board of Trustees.

Material approved for deaccessioning from the Society's collections will be handled or disposed of in one of the following acceptable methods:

1. Transfer to the Education/Prop/Library Non-Accessioned Collection if there is a foreseeable need for the object in that collection.
2. Transfer through exchange, gift or sale to another non-profit institution.
3. Sale through public auction.
4. Discard if the object or document possess a health or safety hazard or are in such a deteriorated state to be of no value.

D. Proceeds

Proceeds generated from deaccessioning as described in subsection C above, or from the sale of unwanted items as described in Section V., subsection L., shall be used for future acquisitions and/or care of the existing General History Collection.

E. Ethics

Objects or documents may not be returned to the original donor, the donor's heirs or any private individual, except by proper purchase of such objects or documents by such individual(s) through public sale or auction or if the donor was a non-profit, tax-exempt corporation, by purchase for fair value or exchange for items(s) of comparable value.

F. Documentation of Deaccessioning

Thorough documentation of the disposition of deaccessioned items will be maintained as part of the Society's collection records.

VII. LOANS

Loans are temporary transfers of collections materials from the Society or temporary transfers of materials to the Society for stated Society purposes. The transfers do not involve a change of ownership.

A. Incoming Loans

1. Loans to the Society are accepted only for a prearranged use (such as an exhibit) and for a period of time that generally does not exceed one year. No other type of loans will be accepted due to the expense and problems of care, handling, insurance and storage, as well as the legal complications involved. Loans may be renewed upon approval of the Executive Director or his/her designee.
2. The Executive Director or his/her designee will review all loans to the Society.
3. The Society will ascertain, prior to the time of the loan, whether the lender has the legal right to loan the object.

4. An object loaned to the Society will receive the same degree of care and attention given to objects owned by the Society. Careful consideration should be given to the condition of the object and whether special care or handling requirements will incur added expense to the Society.
5. The Society will have full, legal documentation regarding all loan arrangements, including a loan agreement signed and dated by both the lender and the Executive Director his/her designee on behalf of the Society.
6. The Executive Director his/her designee is responsible for monitoring the loan and for supervising packing and shipping of borrowed objects when they are returned to their owner.

B. Outgoing Loans

1. Loans from the General History Collection may be made to public agencies or institutions, or qualified educational or nonprofit institutions. The loans are to be made for a prearranged purpose (such as exhibit, study, or duplication) and generally are not to exceed one year in length unless otherwise approved by the Executive Director his/her designee.
2. All intellectual property rights in the loaned objects or documents (copyright, patent, trademark, or trade secret) will remain property of the Society. Approval must be obtained from the Executive Director or his/her designee for all outgoing loans.
3. All requests for loans from the Society must be made in writing. Before objects or documents are loaned from the Society, the following criteria must be met by the borrower:
 - a. Borrower must demonstrate, to the satisfaction of the Society, the ability to provide proper environmental, exhibit, and security standards for objects or documents borrowed.
 - b. Borrower must pay all packing and transportation costs and assure safety of objects or documents during transit.
 - c. Prior to executing the loan, a completed loan agreement, in a form that is acceptable to the Society and approved by the Board of Trustees, must be signed by the borrower or his/her representative and the Executive Director or his/her designee on behalf of the Society.
4. All outgoing loans will be approved, reviewed and renewed by the Executive Director or his/her designee. The Executive Director or his/her designee is responsible for monitoring the loan, for supervising packing and shipping the material when it is sent out, and for examining and recording the condition of the objects when they are returned.

VIII. OBJECTS or DOCUMENTS in the CUSTODY of the SOCIETY

A. Temporary Custody & Loan For Duplication

Objects or documents may be left in the temporary custody of the Society for the purposes of study, identification, reproduction, consideration for acquisition, etc., provided such temporary custody is for the primary benefit of the Society. A temporary receipt or Loan for Duplication form will be completed and signed by the lender and the person receiving the object or document for the Society.

B. Found in Collection

Any object or document that does not have an accession number and no discoverable documentation will be classified as Found in Collection (FIC). Because there are a number of

factors that can define an item as FIC, FIC material should undergo careful investigation before any action, such as accessioning, processing or disposal takes place. It will be assumed that any object or document classified as FIC has been accessioned until proven otherwise. See Guidance Memorandum for the Proper documentation of “Found in Collection” materials in the SOHS collections (Appendix A).

IX. CARE of the COLLECTIONS

At all times, the Society should be aware of their responsibilities to preserve and protect collections objects and documents. Standards for the care of objects in storage, on exhibit, being used by researchers, undergoing preservation or conservation treatment, and on loan will conform to current best practices. These standards will apply to climate control, storage and exhibit space, documentation, monitoring, housekeeping, handling, security, theft/vandalism, natural disaster and other emergencies, and pest management. Procedures regarding these activities will be established, maintained and distributed to all Society staff.

Every effort will be made to care for the collections using up-to-date professional procedures. Objects in this collection will be stored in an environmentally controlled and secure area. Curatorial, conservation and photographic records will be maintained. Conservation and care procedures shall follow established professional standards and shall be a regular part of the long-range conservation plan. A qualified conservator will carry out any conservation work. Handling and exhibition of the General History Collection will be carried out by or with the approval of the Executive Director his/her designee.

X. COLLECTIONS RECORDS

The Society shall have an established system for preserving data on the collections according to current professional standards. This data includes, but is not limited to, accession and deaccession records, correspondence relating to acquisitions, catalog records, loan records, permission and use records, documentation of conservation treatments, and exhibit files. All documentation relating to collections is considered permanent record of the Southern Oregon Historical Society and is subject to preservation, privacy and access protections including safeguard against fire, theft and vandalism.

The Society will generally provide reasonable access to collections records and collections-related procedures for the purposes of study and research, with a reasonable amount of advance notice and approval by the Executive Director his/her designee. Such requests are subject to considerations of security, a donor’s request for anonymity and the Society’s financial and physical ability to accommodate such requests. The Executive Director or his/her designee will establish rules and guidelines regarding the public’s use of collections records.

XI. INSURANCE

The Society will maintain an insurance policy covering the collections at a value level determined from time to time by the Executive Director and approved by the Board of Trustees. The value may be based on appraisals provided by qualified appraisers or Society staff or on reasonable estimates. Such appraisals shall be considered confidential due to security considerations.

The insurance policy will also cover any incoming and outgoing loans and objects left in the custody of the Society. All deviations from established insurance procedures must be recommended by the Executive Director and approved by the Board of Trustees.

XII. EMPLOYEE ETHICS

A. Personal Collecting

Employees are discouraged from collecting in any field that is relevant to the collections of the Society. Collecting by employees in a field relevant to the Society's General History Collection, if done at all, shall be done with great care to maintain the necessary distinction between their official and their private activities. The utmost discretion shall be exercised to assure that no conflicts of interest or appearance of conflicts of interest arise between the employees collecting for themselves and the Society.

Collections acquired before employment, family inheritances, and collections outside the society's field of interest are generally exempt from the policy.

Collecting done privately by employees must adhere to the following guidelines:

1. Collecting by employees shall be reported in writing to the Executive Director.
2. Employees must never compete with the Society for an object or documents.
3. Employees must give their institution first option to acquire an object or documents that they have purchased or intend to purchase before adding it to their personal collection or the personal collection of any immediate family member.
4. Employees must not purchase objects or documents deaccessioned from the Society or trade objects or documents from their personal collections for objects or documents from the Society's collections.
5. Employees will not store personal collections on Society grounds or research their personal collections during work time without permission of the Executive Director.
6. If employees lend objects or documents for the Society exhibitions, they should lend them anonymously. Similarly, illustrations of works in employees' collections should be credited anonymously in the Society's publications.
7. If employees decide to dispose of part or all of their personal collection, they should offer it first to the society as a gift or at fair market value.
8. An employee should not negotiate privately with anyone with whom the employee does business on behalf of the Society, without first obtaining permission from the Executive Director or the Board of Trustees.
9. Neither relatives nor friends should engage in a transaction on behalf of the employee that is not in compliance with the above-state principles. Employees should also urge members of their immediate family to comply with these restrictions and constrictions in their personal transactions.

B. Dealing

There is a distinct difference between dealing (buying and selling for personal profit) and occasional sales to upgrade a personal collection. To avoid conflicting loyalties, dealing and brokering in items and materials represented in the Society's General History Collection is prohibited for all employees. An employee must not act as a dealer, be employed by a dealer, or retain an interest, directly or indirectly, in a dealership.

C. Responsibilities to the Collections

No employee shall use for any personal purpose an object or document or item that is part of the Society's collections or is under the guardianship of the Society unless such uses are available to the general public. Exceptions because of special situations or circumstances may be granted with written permission from the Executive Director or his/her designee.

D. Monetary Appraisals

Employees shall not appraise any objects or property of the type collected by the Society for a donor, trustee, lender, client, or patron either for a fee or as a service. Employees may prepare appraisals only for Society benefit. When recommending outside appraisers, employees should provide more than one source whenever possible.

XIII. TRUSTEE ETHICS

A. Personal Collecting

Collecting done privately by trustees must adhere to the following guidelines:

1. Trustees must not purchase objects or documents deaccessioned from the society or trade objects or documents from their personal collections for objects or documents from the Society's collections.
2. Trustees will not store personal collections on Society grounds without permission of the board President and the Executive Director.
3. If trustees lend objects or documents for a Society exhibition, they should lend them anonymously. Similarly, illustrations of works in trustees' collections should be credited anonymously in the Society's publications.

B. Dealing and Appraising

A trustee who is a dealer that buys and sells items and materials represented in the Society's General History Collection is prohibited during his tenure as a trustee from dealing with, or doing monetary appraisals for, the Society unless such appraisals are provided free of charge.

C. Responsibilities to the Collections

No trustee shall use for any personal purpose an object or document item that is part of the Society's collections or is under the guardianship of the society unless such uses are available to the general public. Exceptions because of special situations or circumstances may be granted with written permission from the board President and Executive Director.

XIV. REVIEW of the COLLECTIONS POLICY

A formal review and revision of the Collections Policy will be conducted approximately every five years to maintain its validity and usefulness in guiding staff, volunteers and trustees. Proposed revisions that result from this review will be submitted to the Collections Committee and, in considering revisions, the Committee shall be guided by current professional standards and best practices. The Executive Director or his/her designee will present the proposed revisions to the Board of Trustees for final approval.

Adopted: April 26, 1989
Revised: August 25, 1993
Revised: June 25, 1997
Revised: June 11, 2003
Revised: January 28, 2007
Revised: September 23, 2015

APPENDIX A

Guidance Memorandum

February 11, 2014

To: All employees and volunteers dealing with archival collection materials
From: Executive Director, Southern Oregon Historical Society (SOHS)
Subject: Proper documentation of “Found in Collection” materials in the SOHS collection.

Background

The SOHS collections policy and standard museum practice provides procedural protocols in which anything “**found in the collection**” without an accession number is always assumed to be an accessioned artifact until proven otherwise. This is because there are certain legal restrictions regarding artifacts that are not accompanied by a transfer of title.

Unfortunately, these policies and procedures have not been followed, resulting in hundreds of library materials designated as non-accessioned even though they are in fact accessioned. According to the Collections Policy, de-accessioning is authorized only with the approval of the Collections Committee and the Board.

In summary, there is a lack of an “audit” trail or “chain of custody” on hundreds of archival collection materials, which is a violation of public trust, the SOHS collections policy, and, in some cases, Oregon statutes.

Policy

The **Oregon State Statutes, Chapter 358**, provides a legal requirement for public trust of collections in museums and historical societies.

In particular, the relevant portions of the statutes concerning un-numbered objects found in the collection state:

358.415 Definitions for ORS 358.420 to 358.440. For the purposes of ORS 358.420 to 358.440:

(1) “Loan,” “loaned” and “on loan” *include all deposits of property with a museum that are not accompanied by a transfer of title to the property.*

358.420 Status of property loaned to a museum; statute of limitations on recovery.

- (1) No action shall be brought against a museum to recover property on loan to the museum when more than 25 years have passed from the date of the last written contact between the lender and the museum.
- (2) Property on loan to a museum shall be deemed to have been donated to the museum if no action is filed to recover the property within seven years after the museum gave notice of termination of the loan as provided in ORS 358.425 and 358.430.
- (3) Property on loan to a museum shall not escheat to the state under ORS 112.055, but shall pass to the museum if no person takes under ORS 112.025 to 112.045. [1985 c.580 §2]

See also:

358.425 Notice of termination of loan

358.430 Procedure for giving notice

358.435 Status of title to acquired property

358.440 Notice to lenders

In addition, the **SOHS Collections Policy** further provides direction with regard to accessioning, de-accessioning, archiving, and recording artifacts, both three-dimensional and library artifacts.

The full Collections Policy will be provided to you on request, however the relevant portion is: **Section VI, Part G**, which states in part, “Objects or documents that the Society may not have full title to, may not be eligible for deaccessioning except in accordance with ORS 358.420” (see definition above).

Procedures:

To comply with these policies, the following procedural guidance is provided and will be followed for successful implementation:

1. The Curator, under the direction of the Executive Director, has complete authority to provide all SOHS staff and volunteers direction in all matters regarding the collection policy.
2. The Registrar, under the direction of the Curator, is delegated the sole responsibility to assign accession numbers, delete or change accession numbers, and oversee the volunteer and staff training in Past Perfect.
3. Anyone using Past Perfect is required to attend mandatory Past Perfect training sessions overseen by the Registrar, prior to any cataloging.
4. All staff and volunteers are reminded that any artifact entering SOHS will have a temporary receipt and be given to the Curator or Registrar to prepare for the Collections Committee and Board. Only the Committee determines the designation into the appropriate collections – accessioned or non-accessioned.
5. Any object “Found in Collection” will be considered an accessioned artifact and assigned the appropriate numbers by the Registrar or persons trained and overseen by the Registrar.

If you have any questions regarding this guidance or wish to receive copies of the policy, or request training, please contact Tina Reuwsaat, Associate Curator.

APPENDIX B

Oregon Revised Statutes (ORS): LOANS TO MUSEUMS

358.415 Definitions for ORS 358.420 to 358.440. For the purposes of ORS 358.420 to 358.440:

- (1) “Loan,” “loaned” and “on loan” include all deposits of property with a museum that are not accompanied by a transfer of title to the property.
- (2) “Museum” means an institution located in Oregon that:
 - a. Is primarily educational, scientific or aesthetic in purpose;
 - b. Owns, borrows or cares for, and studies, archives or exhibits property; and
 - c. Is operated by a nonprofit corporation or public agency.
- (3) “Property” includes all tangible objects, animate and inanimate, under a museum’s care that have intrinsic value to science, history, art or culture, except that it does not include botanical or zoological specimens loaned to a museum for scientific research purposes. [1985 c.580 §1; 2005 c.22 §256]

358.420 Status of property loaned to a museum; statute of limitations on recovery.

- (1) No action shall be brought against a museum to recover property on loan to the museum when more than 25 years have passed from the date of the last written contact between the lender and the museum.
- (2) Property on loan to a museum shall be deemed to have been donated to the museum if no action is filed to recover the property within seven years after the museum gave notice of termination of the loan as provided in ORS 358.425 and 358.430.
- (3) Property on loan to a museum shall not escheat to the state under ORS 112.055, but shall pass to the museum if no person takes under ORS 112.025 to 112.045. [1985 c.580 §2]

358.425 Notice of termination of loan; content.

- (1) A museum may give notice of termination of a loan of property at any time if the property was loaned to the museum for an indefinite term. If the property was loaned to the museum for a specified term, the museum may give notice of termination of the loan at any time after the expiration of the specified term.
- (2) Notices given under this section shall contain:
 - a. The name and address, if known, of the lender;
 - b. The date of the loan;
 - c. The name, address and telephone number of the appropriate office or official to be contacted at the museum for information regarding the loan; and
 - d. Any other information deemed necessary by the museum. [1985 c.580 §3]

358.430 Procedure for giving notice; responsibility of owner.

- (1) To give notice of termination of a loan, the museum shall mail a notice to the lender at the most recent address of the lender as shown on the museum’s records pertaining to the property on loan. If the museum has no address in its records, or the museum does not receive written proof of receipt of the mailed notice within 30 days of the date the notice was mailed, the museum shall publish notice at least once a week for three consecutive weeks in a newspaper of general circulation in both the county in which the museum is located and the county of the lender’s address, if any.
- (2) For the purposes of this section, if the loan of property was made to a branch of a museum, the museum is located in the county where the branch is located. Otherwise, the museum is located in the county in which it has its principal place of business.

- (3) It is the responsibility of the owner of property on loan to a museum to notify the museum promptly in writing of any change of address or change in ownership of the property. [1985 c.580 §4]

358.435 Status of title to acquired property. One who purchases property from a museum acquires good title to the property if the museum represents that it has acquired title to the property pursuant to ORS 358.420. [1985 c.580 §5]

358.440 Notice to lenders. When a museum accepts a loan of property, the museum shall inform the lender in writing of the provisions of ORS 358.420 to 358.440. [1985 c.580 §6]