

Collections Management Policy

Santa Clarita Valley Historical Society

Approved March 27, 2023

Technical revision October 23, 2023 (mission statement)

Table of Contents

I. Introduction.....	3
II. Mission and Collections	5
III. Acquisitions and Accessions	7
IV. Deaccessions and Disposals	12
V. Incoming Loans.....	21
VI. Outgoing Loans.....	23
VII. Documentation.....	26
VIII. Collections Care	27
IX. Insurance and Risk Management	29
X. Access and Use	30
XI. Intellectual Property	32
Appendixes	
Furnishing/Collections Plan for Buildings	34
How to Handle Old Loans.....	38
Outgoing Loan Agreement	40
Archive Access Policy	42

I. Introduction

A. Statement of Purpose

This Collections Management Policy governs all aspects related to the development, management, preservation, and use of the collections of the Santa Clarita Valley Historical Society (hereafter “SCVHS,” “the Society”). The policy provides a framework of professional standards to establish guidelines for managing the collections.

The Collections Management Policy is a comprehensive written statement that:

- * Sets forth the mission of SCVHS;
- * Explains how this mission is pursued through collection activity;
- * Articulates the organization’s professional standards regarding objects in its care;
- * Serves as a guide to staff and volunteers in carrying out their collection related responsibilities; and
- * Provides the public with information about what objects and information the organization collects and preserves and how the organization performs these functions.

This policy was developed and drafted by the staff of SCVHS with the assistance of the Conservation Center for Art and Historic Artifacts (CCAHA) as part of an initiative funded by the Institute of Museum and Library Sciences.

B. Process of Establishing Policy

This Collections Management Policy is a working document. Any errors, omissions, or other necessary changes will be identified and updated by SCVHS staff in a timely manner.

All policies are approved by the Board of Directors. The final draft was submitted to the Board of Directors for comment and approval.

This policy is an outgrowth of a strategic planning process conducted by and among the Board of Directors in 2022, which called for a review of the organization’s baseline documentation. It was developed by a Collections Committee established in 2022, consisting of Directors Leon Worden, Ann Stansell and Sarah Brewer; and staff members Eva Gritz (Archivist) and Carol Rock (Marketing Director). It was adopted by the Board of Directors in 2023.

C. Statement of Authority

SCVHS is organized as a 501(c)(3) nonprofit corporation and is overseen by a Board of Directors. The collection is owned by SCVHS.

The governing authority’s role in managing the collection is to develop, or cause to be developed, policies and financial resources to support the use of “best practices” in collections care, management, exhibition, and storage. The day-to-day management of SCVHS is delegated to the

Collections Manager, who bears the ultimate responsibility for implementation of this Collections Management Policy.

D. Permanent Collections Charge

The Society's permanent collection is overseen by the Archivist under the supervision of the Collections Manager.

The Collections Committee consists of Board and staff members who are jointly or individually responsible for the care, management, research, and development of policies related to the collections. Railroad-related collection objects are additionally supported by a committee of Southern Pacific Railroad historians. The Collections Committee advises the Board of Directors on matters related to the care and management of the collection including policies, capital needs, and major accessions; it presents recommendations on deaccessions to the Board of Directors for approval; and it consults with the Board of Directors on exceptions to established policies. The Collections Committee, or members thereof, are committed to participating in continuing education (coursework, webinars, independent study) to stay abreast of "best practices" in legal, ethical, and professional standards regarding collection management.

E. Code of Ethics

SCVHS recognizes the code of ethics of the American Association for State and Local History (AASLH) and the American Alliance of Museums (AAM). In general principle, SCVHS affirms and supports the contents of these codes.

The [SCVHS Code of Ethics](#) can be found at the organization's SCVHS.org website under About>Core Documents.

F. Review and Revision

This policy shall be reviewed by the Collections Committee annually. Any major changes regarding the collection or its management may necessitate more frequent revisions. Additionally, the policy may be reviewed and revised at any time as determined by the Collections Committee.

G. Public Disclosure

Copies of this Collection Management Policy will be provided to the Board and appropriate staff of SCVHS. The policy will be made public via the organization's SCVHS.org website.

II. Mission and Collections

A. Institutional Mission

The mission of the Santa Clarita Valley Historical Society is to preserve and share the culture and history of the Santa Clarita Valley. SCVHS is the honest chronicler of its stories, protector of its cultural materials, and advocate for local landmarks. The Society's Santa Clarita History Center bridges generations and inspires diverse populations through accessible and inclusive exhibitions and activities. SCVHS employs best practices in collections care and preservation to ensure that the rich historical legacy of our people will be available to current and future generations.

B. Description and Scope of Collection

1. Overview

SCVHS collects objects with a strong historical and/or cultural connection to one or more persons, places, and events within or directly affecting the Santa Clarita Valley and environs. Temporally, the collection covers the expanse of human habitation of the area from approximately 5,000 years ago to "five minutes ago," with a modest representation of geological and paleontological ("natural history") objects, as well. Geographically, the area of interest is unrelated to current geopolitical boundaries. Rather, it radiates outwardly from local population centers to encompass areas with historical connectivity. It includes the portions of Los Angeles, Ventura, and Kern counties that have been included since the time of our first local historians in the early 1900s when the nearest jurisdictional boundary was the 1,200-square-mile Soledad Township.

2. Geographical Boundaries

The principal area of interest is roughly contiguous with the traditional area of habitation by the indigenous Tataviam people. It encompasses the historic Ranchos San Francisco, Temescal, and Castec on the west and the edge of the Mojave Desert on the northeast. Rimmed by the Santa Monica, Topatopa, Sierra Pelona, and San Gabriel Mountains, it lies within the fault-laden Transverse Ranges of Southern California. The collecting area extends clockwise from the Newhall Pass on the south to the western edge of the historic Rancho San Francisco at Piru, thence northerly to Tejon and the former Sebastian Indian Reservation, continuing easterly through the Lake Communities (Hughes-Munz-Elizabeth) to Acton and the mouth of Soledad Canyon, thence southerly through the west side of the Angeles National Forest to Sand and Placerita Canyons on the southeast.

3. Exceptions

Certain subject-matter areas of interest extend beyond these boundaries, by way of example only: early California history; the St. Francis Dam Disaster; borax mining; the Southern Pacific Railroad (specifically the Los Angeles and San Joaquin Divisions); Standard Oil Company of California; the life and career of Henry Mayo Newhall and William S. Hart; NASA-JPL programs associated with local residents; careers of professional athletes, artists, and influencers who came from the

community. Collection policies for the buildings and features of the SCVHS campus are set forth in the document, Furnishing/Collections Plan for Buildings.

4. Type of Materials Collected

Collection objects are not limited by type. They range in size from large (buildings, locomotive) to small (born-digital computer files). The collection currently includes archaeological materials; basketry objects; books; ceramics, glass, metals, plastics; documents, manuscripts; furniture and wooden objects; geological, mineral, paleontological materials; historic buildings; horological objects; machinery; medals; military (uniforms); motion picture and audiovisual materials; numismatics; paintings; philately; photographic negatives and prints; sculpture (indoor); textiles and costumes; tools; toys and dolls; transportation objects (vehicles, railroad rolling stock); and works of art on paper.

5. Representation

SCVHS strives to assemble a diverse collection of materials that reflect the whole community. SCVHS is particularly attentive to opportunities to acquire materials and oral histories that encompass the experiences and lifeways of peoples and communities that may currently be underrepresented in the collection.

6. Special Collections

The core photograph collection ("Core Collection") consists of approximately 10,000 prints that were collected locally beginning about 1919. The overall collection includes several large collections including the local newspaper's photo archive ("Signal Photo Archive") consisting of approximately 950,000 photographs (negatives and born-digital) from the 1960s-2000s; and approximately 4,000 pieces of original artwork created by the newspaper's editorial cartoonist during the 1980s-1990s ("Randy Wicks Collection").

SCVHS also is the custodian of Native American artifacts from the sites of two development projects that were excavated in the 1990s and early 2000s, all of which have been determined by state and federally designated tribal authorities to be in compliance with applicable federal and state laws. See Subsection IV.E.

C. Purpose of the Collection

SCVHS has collected objects to advance its mission of preserving and sharing the culture and history of the Santa Clarita Valley. Historically, all objects have been acquired through donation and with funds donated specifically for acquisitions.

Artifacts have been acquired for the purpose of preservation, interpretation, and informing/sharing with the public through exhibition as well as local media and online resources.

Collection objects will continue to be preserved, interpreted, and shared with the public through exhibitions and online resources to fulfill the organization's goal of stimulating public interest in the history of the Santa Clarita Valley and environs. "If you want to understand today, you have to search yesterday." (Pearl S. Buck, 1892-1973).

III. Acquisitions and Accessions

A. Methods of Acquisition

SCVHS is empowered by its governing authority, the Board of Directors, to acquire objects for the collections by gift and bequest.

“Acquisition” is the procurement of an object for the collection by SCVHS. “Accessioning” is the process by which the title to an object passes to SCVHS, establishing legal custody and ownership and providing information on how SCVHS acquired the object.

B. Authority

The Archivist or Collections Manager may initiate the acquisition process in accordance with the criteria established in this document.

Acquisitions of donated objects that conform with the organization’s collecting goals are approved and processed on a day-to-day basis by the Archivist or Collections Manager, each of whom is also authorized to deny acceptance of objects that fall outside those parameters or which are beyond the Society’s ability to provide proper care and/or storage. All decisions can be appealed to the Board of Directors.

Donations to SCVHS are accepted upon the approval of the Archivist or Collections Manager, or by the Board of Directors in the case of complex or unusual acquisitions.

The Collections Manager must approve any acquisition (by purchase or donation) that will involve significant staff time and/or storage space, which may be defined as complex or unusual acquisitions. Under preexisting Board policy, acquisitions and disposition of Native American cultural materials require consultation with the local tribal entity, the Fernandeño-Tataviam Band of Mission Indians.¹

C. Criteria for Collection Acquisition

SCVHS only acquires an object for the collection with the intention of retaining it for the long term. No objects or documents shall be accepted into the permanent collection of SCVHS with the sole purpose of being deaccessioned and sold.

Before any object is acquired by any means, the following criteria must be met:

1. Collecting Scope

SCVHS will accept only those acquisitions which fall within the scope defined in Subsection II.B above, and within collection criteria as defined in additional organization policies.

¹ Standing Rule No. 7, adopted January 23, 2023.

2. Format

As further defined in Subsection II.B.4, the primary formats collected include fine arts (e.g. paintings, works on paper, sculptures, etc.), decorative arts (e.g. dishware, textiles, jewelry, furnishings, etc.), books, archaeological artifacts, anthropological artifacts, historical artifacts, natural history specimens, archival collections, photographs, and digital material.

If audiovisual recordings in an unusable format are acquired (e.g., electronic or other audiovisual materials for which SCVHS does not have the proper playback equipment), provision for their transfer to other data sources should be made at the time of their acquisition.

3. Title

All acquisitions must be accompanied by clear title presented by the donor, seller, or the donor's authorized agent. Title to donated objects is memorialized through the SCVHS Deed of Gift or Donation/Use Agreement, as appropriate. Additional documentation of legal title may be required for unusual donations such as vehicles.

If the seller or donor owns copyright to the donated object, such rights must be relinquished and the object must be placed into the public domain at the time of donation through specific statement in the signed Deed of Gift or Donation/Use Agreement, as applicable.

At its discretion, SCVHS may request documentation of an object's provenance.

4. Condition

The object must be in good condition (or can be stabilized or conserved or, in the case of born-digital materials, transferred to another medium).

The object must be in a condition to be exhibited or, if for study, sufficiently stable to permit that activity.

The object must not be immediately hazardous to people or property.

If in need of immediate conservation, the object must exhibit an important connection to SCVHS collections or programs, making the effort worthwhile; and it must be able to be conserved within the available resources of SCVHS or be accompanied by a monetary donation for its conservation. No object shall be acquired for the collection if SCVHS cannot provide proper storage, protection, and preservation, or have a viable plan for same.

Exceptionally large or damaged objects, or any object that cannot immediately be made available for research due to its size, poor state of preservation, physical instability, risk to staff or other objects, etc., will be evaluated on a case-by-case basis, and provisions required for the care and conservation of the object will be taken into account before accepting the object(s).

5. SCVHS Resources

SCVHS must have the resources necessary to acquire and care for the object. SCVHS must be able to afford to transport, describe, and conserve the object. If an object is not offered as a gift or bequest, SCVHS must be able to afford to purchase the object using funds donated specifically for purchasing objects.

SCVHS must have the capacity to secure, store, and/or exhibit the object safely.

6. Duplicates

In certain instances, SCVHS will acquire duplicates of objects or materials already in the collection. Some examples: SCVHS collects two (2) copies of published works in which SCVHS-provided images appear, and two copies of other ephemera (e.g., event programs, catalogs, pamphlets). If SCVHS requires two identical Southern Pacific Railroad lanterns for its Depot, then SCVHS will acquire two of them, etc.

True duplicates are rarities. Two high school yearbooks from the same school and the same year are not duplicates if they contain different signatures and inscriptions. The provenance of an object can make it unique: Two numbered Randy Wicks prints that are identical in every way except for their number, one of which was given to Jo Anne Darcy and the other to Carl Boyer, are not duplicates. Dinnerware accumulated over time to form sets for display in a historic building would not be considered duplicative.

7. Legal and Ethical Considerations

The object cannot have been illegally imported into the United States or illegally collected within the United States. SCVHS must perform due diligence to confirm the object's legal status to the best of its ability prior to acquisition.

8. Conditional Acquisitions

Gifts and bequests should be accepted only if they conform to the stated policies of SCVHS. Objects that are subject to the imposition of special and restricting conditions may not be accepted if the conditions are contrary to the interests of SCVHS.

All gifts must be unrestricted, with no commitment made to the donor to retain them in perpetuity or to exhibit them. Conditions regarding exhibiting objects should be avoided except under the most unusual circumstances. If such conditions are accepted, these conditions should apply only to a limited, specified period, and must be approved by the Board of Directors.

SCVHS will not accept collections of objects donated with the condition that the entire collection be accessioned. SCVHS has the right to choose, within a proposed donation, which objects it wishes to keep. For manuscript and archival collections, the standard practice of accepting an entire collection and selecting materials for disposal as the collection is processed will be followed.

9. The Research Library and Time Travel Trunk

SCVHS may accept donations of non-collection reference materials, equipment, supplies, and objects given to support and further its educational objectives. These materials may be subject to handling in a manner that deviates from standard collections care. Specifically, books and other printed matter in the Research Library are available for on-site study under staff supervision. Objects in the Time Travel Trunk are selected and intended for hands-on demonstrations and discussions with children in local school classrooms, public libraries, and other locations around town.

D. Acquisition Terms and Restrictions

SCVHS will not pay for a monetary appraisal of a proposed gift for a donor, nor recommend an appraiser. No board member, employee, volunteer, or consultant employed by or associated with SCVHS may appraise a potential gift for a donor.

Donations are accepted when they conform with the organization's collecting goals, i.e., when they fit within the mission and the parameters set forth in Section II.B. Additional considerations may include the Society's ability to care for and/or store the objects; the condition of the objects; their usefulness for exhibitions; redundancy with objects already held; whether there is a better or more appropriate repository; and whether a shared arrangement with another repository would be appropriate.

Donor information is recorded on the Deed of Gift or Donation/Use Agreement form which is retained in the organization's records. The information is copied into the organization's collections database. The donor is identified when a facsimile of the object is displayed in an online portal (digital archive) and on printed matter, including museum labels, if and when the object is placed on exhibition.

No person who is a staff member, board member, or volunteer, or who is involved in the policy or management of SCVHS, may compete with SCVHS in the marketplace or elsewhere for potential collection objects or take advantage of privileged information. Should a conflict of interest develop between the needs of the individual and SCVHS, the needs of SCVHS will prevail. This is further addressed in the SCVHS Code of Ethics and Conflict of Interest Policy.

Objects that are intended to be sold will not be accessioned into the collection. Non-collection objects donated for sale as part of a fundraising activity will not be commingled with collection objects.

E. Documentation of Acquisitions and Accessions

The complete procedure of acquiring and accessioning any object will be recorded. All documents relating to the object, including the signed Deed of Gift or Donation/Use Agreement, will be deposited in the relevant collection files.

Donations are documented with a Deed of Gift or Donation/Use Agreement form which remains with the objects until they are accessioned. Oral history recordings are documented with both the Deed of Gift form and with releases signed by the subject and the interviewer.

Materials which are temporarily borrowed by the organization for the purpose of digitizing them and including them in the SCVHS collection archive and, at its discretion, in a public-facing digital history archive, are documented with a Donation/Use Agreement, which includes the relinquishment of intellectual property rights and affirmative placement into the public domain. Objects borrowed for this purpose are given first priority and are promptly returned to the donor following digitization.

Gifts: The Archivist assigns an accession number to the new collection/donation and a unique identifier (catalog number) to each individual object within the new collection and enters the

information into the collections database (PastPerfect). The archivist scans or photographs the objects or duplicates them, in the case of sound or motion picture recordings, or causes them to be scanned, photographed, or duplicated, and stores the files on the organization's server and backup drives, which may be located on- and off-site.

Gifted objects are packed in appropriate archival housing (e.g., sleeves, boxes) and placed into secure, climate-controlled storage.

Materials temporarily borrowed for digitizing: The scanned images, in the case of 2-dimensional objects, or photographs, in the case of 3-dimensional objects, or audio or video files, in the case of sound or motion picture recordings, are inventoried in the collections database in the manner described above and stored on the organization's server and backup drives, which may be located on- and off-site.

IV. Deaccessions and Disposals

Deaccessioning is the process of permanently removing accessioned objects and materials from the Society's permanent collection. The sole purpose of deaccessioning any object or archival collection within SCVHS is to refine and strengthen the overall collections. This objective should be achieved either by removing objects from the collection that have no historical relevance or relationship to the Santa Clarita Valley and environs, as defined, thus eliminating the human, financial, and special cost of their continued care; or by using designated disposal proceeds to acquire objects of better quality and significance.

Deaccessioning is an important collections management tool that is employed by collecting institutions around the world for a variety of reasons. As the Society's collection grows, it is recognized that some objects that were obtained in the past despite their incongruity with the Society's collecting goals, or which cannot be properly housed, conserved, and/or exhibited, may be considered for deaccession and disposal.

Because deaccessioning can adversely affect an institution's collection, reputation, and ability to raise funds, all objects proposed for deaccessioning must be subjected to a thorough review. Procedures for the deaccession or disposal of materials are more rigorous than those for accessioning insofar as all deaccessioning actions require approval by the Board of Directors. The decision to dispose of materials is made only after scrupulous consideration of the public interest and the needs of researchers. The process of deaccessioning and disposal must be carried out in as open and public a manner as possible.

SCVHS will carefully assess all materials before accepting them in order to lessen the likelihood of deaccessioning. Nevertheless, there are valid reasons why materials in collections may be deaccessioned.

Archival processing includes the selection and disposal of material on a regular basis. As new material is presented to SCVHS for potential acquisition, it is evaluated for its conformity with the Society's collecting goals. Some of the material may be accepted, and some may not be. Material rejected or discarded as a part of this normal process – material which has never been accessioned into the SCVHS collection – is not subject to the same rigor of deaccession procedures as accessioned collection objects and materials.

Guidelines and standards have been set by professional organizations to promote clear, consistent, and ethical deaccessioning practices. The following policy for deaccessioning of materials from SCVHS is in accordance with the standards established by the American Association for State and Local History (AASLH) and the American Association of Museums (AAM).

Considerations regarding deaccessioning are subject to the terms of acquisition, local regulations, and state and federal laws.

A. Authority

All deaccessions must be approved by the Board of Directors. Recommendations for deaccessioning are presented to the Board of Directors by the Collections Manager acting on behalf of the Collections Committee.

B. Criteria for Deaccessioning

Because SCVHS is aware of its role as a steward of the collection for the benefit of the public, it acquires only those objects which it intends to retain for the long term and not with the intention of disposing.

To be considered for deaccessioning, an object must fulfill the following requirements:

1. Be free from donor-mandated restrictions;
2. Be fully and legally owned by SCVHS; and
3. Meet at least one of the following criteria:
 - * The object or material does not meet the criteria for the purpose and scope of collections described in Subsection II.B and hence does not support the organization's mission;
 - * The object or material is redundant or has no value as part of a series, and as such does not enhance teaching, research, or study;
 - * The object or material is unduly difficult or impossible to care for or store properly;
 - * The object is in a format that the organization cannot support and has not been or cannot be reasonably converted to another format;*
 - * The object has been extensively damaged or presents a risk to other materials in the collections and/or to the individuals working therein and cannot be restored without compromising its integrity;
 - * The object or material was acquired illegally or unethically, is requested for repatriation, or is shown to be the rightful property of another person or entity;
 - * The object has been determined to be inauthentic;
 - * The organization is unable to preserve or manage the object or material properly;
 - * The object or material was given by a donor with the express understanding that it may be sold or given away.

** Destruction of unstable or dangerous photographic materials that have been transferred to a stable format, such as reformatted nitrate negatives, are not deaccessions. Although the original materials are destroyed, the images survive and have the same accession and catalog numbers as the originals.*

C. Restrictions and Conditions on Deaccessioning

When considering deaccessioning, SCVHS will carefully weigh the interests of the public for which it holds the collections in trust, the interests of the scholarly and cultural communities, and the Society's mission.

SCVHS will consider any legal restrictions, the necessity for possession of valid title, and the donor's intent in the broadest sense. Under no circumstances will a deaccessioned object be given to, or otherwise placed in, the possession of SCVHS staff, volunteers, board members, or any representative or immediate family member of the aforementioned.

D. Methods of Disposal of Standard Objects

"Standard objects" are defined as those which are not covered under Subsection E or Subsection F below. SCVHS may dispose of a standard deaccessioned object by exchange with or conveyance (gift) to a government agency or nonprofit institution with a similar mission, or by sale or witnessed destruction when it is warranted.

The Collections Committee will determine and recommend the most appropriate method of disposal on a case-by-case basis for each standard deaccessioned object. Due consideration should be given to the cultural collecting community in general when disposing of objects. Disposal methods are to be considered in the following order of priority:

1. Exchange: Objects may be exchanged with a government agency or nonprofit institution for the purpose of obtaining other objects needed for the SCVHS collection.

2. Gift: Objects may first be offered to a government agency or nonprofit institution with a mission similar to that of SCVHS, and then to other nonprofit institutions. To the extent it is known, the object's provenance must clearly be indicated. In any instance where title is transferred to another entity, SCVHS will disclose to the potential new owner or intermediary agent any action, such as the retention of a photocopy of the material, which may affect the monetary or scholarly value of the material.

3. Sold: Objects may be offered through a public sale by a disinterested, reputable third party to avoid conflicts of interest or the appearance of conflicts of interest. In no instance shall a private sale, gift, or transfer to a for-profit institution or an individual be acceptable. An auction sale through an unrestricted, publicly accessible online portal is considered a public sale.

4. Witnessed Destruction: This option should be considered if the object has deteriorated so severely that it is no longer useful, and/or if it poses an unacceptable risk or hazard to staff, public, or other objects in the collection. If an object's condition is a criterion for deaccessioning, SCVHS may wish to obtain the recommendation of a qualified conservator before making the final decision. Privacy and confidentiality considerations may justify destruction of archival materials.

Funds from the sale of objects identified for disposal may be used only for the acquisition of new objects for the collection or for the direct care or preservation of existing objects in the collection. Funds are not to be used to provide financial support for institutional operations. In the case

disposal of buildings or landscapes, funds acquired through such disposal can be used for direct care and preservation of objects, archives, buildings, archaeological sites, and cultural landscapes that provide public benefit.

A deaccession because of loss, theft, or involuntary destruction is not a purposeful deaccession. This category includes objects that are stolen and not recovered within 30 days; consumed or effectively destroyed by fire, flood, or other disaster; destroyed by biological or chemical factors; or missing and cannot be located within 30 days after a thorough search. The deaccession is processed and reported to the Board.

E. NAGPRA and CalNAGPRA

The Native American Graves Protection and Repatriation Act of 1990 (NAGPRA) requires federally funded museums to identify Native American human remains, funerary objects, and objects of cultural significance in their collections and collaborate with tribes and Native Hawaiian organizations to repatriate them. The California Native American Graves Protection and Repatriation Act of 2001 (CalNAGPRA) requires state-funded museums that have possession or control over collections of human remains or cultural objects to provide a process for the identification and repatriation of the objects to the appropriate tribes.

SCVHS lacks the desire, capacity, and knowledge to possess or control Native American human remains, funerary objects, or sacred cultural materials. Some if not all of these materials require special care, handling, and ceremonial practices which are known only to, and which are proprietary to, tribal knowledge keepers.

Within the past five years (2018-2023), state- and federally recognized tribal officials and an SCVHS archaeologist (who is an SCVHS Director and a member of the Collections Committee) have reviewed the Native American cultural materials in the collection and/or in the custody of SCVHS. It is the belief of SCVHS that it possesses no Native American human remains, funerary objects, or significant cultural materials within the meaning of NAGPRA or CalNAGPRA.

The primary geographical area of interest of SCVHS as identified in its Collections Management Policy at Section II.B.2 lies wholly within the territory represented by the Fernandeño-Tataviam Band of Mission Indians ("FTBMI"), a sovereign and state-recognized tribal entity.

As indicated above, Board policy dictates that Native American cultural materials are accessioned into the SCVHS collection only upon consultation with, and the approbation of, FTBMI.

If any materials that fall within the scope of NAGPRA or CalNAGPRA were to be found in the SCVHS collection, SCVHS would consult with FTBMI to identify and pursue a path for repatriation.

SCVHS will follow NAGPRA and CalNAGPRA requirements when written requests for repatriation are made by official representatives or "most likely descendants" of Native American tribes, Native Hawaiian organizations and Alaska Native villages or corporations. Requests must include evidence supporting the claim. Upon receipt of a request for repatriation, SCVHS will review its records and consult with FTBMI for advice on the best path forward to settle the claim. If the result is repatriation, SCVHS would follow standard protocols for cataloguing the deaccession and documenting the conveyance of the object(s) to the claimant.

When SCVHS comes into possession of Native American materials not covered under NAGPRA or CalNAGPRA but which, in FTBMI's opinion, are not appropriate for the SCVHS collection, SCVHS acts as a clearinghouse or pass-through agency to convey the materials to FTBMI or to another tribal entity designated by FTBMI. In such cases, the materials are neither accessioned into nor deaccessioned from the SCVHS collection; however, SCVHS retains documentation relating to their acquisition and disposition. If the materials are deemed by SCVHS and FTBMI to be suitable for photographing prior to conveyance to the recipient tribal entity, the resulting images are accessioned into the SCVHS collection as unique, born-digital images, and the associated catalog record(s) would satisfy any document retention requirement relating to the physical materials.

F. Nazi-looted Artwork and Cultural Property

Since the end of World War II, the U.S. government has pursued policies to help restore artwork and other cultural property lost during the Holocaust to their rightful owners. At this writing (2023), the relevant law is the Holocaust Expropriated Art Recovery Act of 2016, which addresses artwork and cultural materials lost between January 1, 1933, and December 31, 1945, as a result of Nazi persecution. The Act establishes a six-year window for civil claims to be filed after the claimant discovers (a) the identity and location of the artwork or property; and (b) a possessory interest in it. The Act sunsets in 2027.

SCVHS does not knowingly possess Nazi-looted artwork or cultural property, nor would it intentionally do so. In the unlikely event that a repatriation claim were to be made against SCVHS regarding an object in its collection, SCVHS would follow the guidance of the American Alliance of Museums, in sum:

- * Address the claim openly, seriously, responsively and with respect for the dignity of all parties involved, and consider each claim on its own merits;
- * Promptly and thoroughly review the claim and all museum records relating to the object(s) in question;
- * Request evidence of ownership from the claimant to assist in determining the provenance of the object, and consult outside experts if necessary;
- * Seek to resolve the matter with the claimant in an equitable, appropriate and mutually agreeable manner, with a preference for methods other than litigation (such as mediation) to resolve the claim.

If an object in the collection is determined to have been unlawfully appropriated during the Nazi era, SCVHS would consider waiving certain available defenses to facilitate the timely return of the object to its rightful owner.

As part of the repatriation process, SCVHS would follow standard protocols for cataloguing the deaccession and documenting the conveyance of the object to its rightful owner.

If SCVHS were to receive a claim that a borrowed object in its custody (an object not owned by SCVHS) had been unlawfully appropriated during the Nazi era, it would promptly notify the lender

and comply with any legal obligations as temporary custodian of the object in consultation with qualified legal counsel.

G. Disposal of Undocumented Objects

If an object is undocumented, SCVHS must make a serious, diligent, and documented effort to learn more about it before considering it for disposal. This process may include:

- * Determining as much about the object's status as possible – any record whatsoever of its documented history, even if incomplete.
- * Consulting institutional records, such as accession records, old inventories, board minutes, old gift and loan agreements, correspondence, newsletters, etc., to attempt to connect the object with some documentation.
- * Recording all additional information that is known about the object.

If an undocumented object is to be donated or sold, SCVHS can use a quitclaim deed that transfers claim and rights to the object to the new owner, with no guarantee of title transfer. Any risk of holding the undocumented object is therefore transferred to the new owner.

If an undocumented object is shown to have, or can be reasonably assumed to have, minimal value (intrinsic, monetary, research, etc.) to the organization, SCVHS may choose to donate the object to a government agency or nonprofit organization. The lack of title transfer will be transparently stated.

If undocumented objects are deemed to have deteriorated beyond repair; if disposal is required to protect the objects themselves or other objects in SCVHS collections; or if they have become a hazard to health and safety, immediate action as appropriate will be taken. SCVHS may choose to obtain the recommendation of a conservator in this event.

Objects which are newly abandoned at the SCVHS campus when no staff is present and when the donor cannot be subsequently identified (aka "doorstep donations"), and materials which come to SCVHS anonymously by other means, are treated as Found-in-Collection (FIC) objects and are either accessioned into the collection or disposed on arrival. The latter instance is a rejection, not a deaccession.

H. Old Loans

SCVHS does not accept new loans of historical objects except as needed for temporary, time-limited museum exhibits. In all but the latter instance, if at any time an object is determined to have been placed on loan to SCVHS in the past and never gifted outright (an "old loan"), SCVHS will take steps to extinguish the loan status as soon as possible by either (a) converting the object to a gift or (b) disposing of it by returning it to the lender, as provided by law.

Section 1899 of the California Code of Civil Procedure sets forth a method for museums to deal with unclaimed property, tailored to the unique circumstances of unclaimed loans to museums. Section 1899 supersedes the provisions of the Unclaimed Property Law (commencing with

Section 1500 of the Code of Civil Procedure) except that at its option, a museum may report property which has been on loan unclaimed by its owner for more than seven years to the Controller pursuant to Section 1530 of the Code of Civil Procedure for disposition in accordance with the provisions of the Unclaimed Property Law.

Any object in the SCVHS collection that is known to have been placed on loan, and any FIC object that is determined to have been loaned and never gifted to SCVHS, is handled in compliance with Section 1899 of the California Code of Civil Procedure as set forth in the internal document titled, "How to Handle Old Loans," which is attached hereto and made a part hereof.

I. Ethical Considerations

SCVHS has a public responsibility and is accountable for the decision to deaccession an object and for the method by which disposal is implemented. The procedure will be documented and there will be no effort to conceal the transaction. Any proceeds resulting from the disposal of objects will be used either for purchase of acquisitions or direct care of the collection. Direct care is defined as investments in existing collections that enhance their life, usefulness, or quality, thereby ensuring they will continue to benefit the public.

Additional discussion of ethical considerations relating to the deaccession of objects in the SCVHS collection can be found in the SCVHS Code of Ethics.

J. Documentation of Deaccession and Disposal

Responsibility to the needs and reputation of SCVHS requires that, in preparing for and carrying out deaccession and disposal, SCVHS will take care to explain the purpose of the deaccession publicly, as well as the intended use of monetary or other proceeds of the disposal, to avoid detracting from the Society's reputation for honesty and responsible conduct, and to carry out the entire process in a way which will uphold public perception of its accountable stewardship.

All documents related to the deaccessioning and disposal process, described below, will be deposited in the relevant collection files and retained permanently. Deaccessioning and disposal purposes and dates will be recorded on any object records, physical and electronic. The deaccessioned object's unique accession number will remain permanently in the institution's records, with clear indication that the records are no longer active.

1. Deaccession Procedures

All deaccessions and disposal recommendations are subject to approval by the Board of Directors as stated in Subsection IV.A. This document sets forth the steps to be followed prior to and after Board approval.

The term "object" as it appears below means a collection object, or a group of collection objects, which have been: (a) accessioned into the collection; *or* (b) approved for the collection but not yet accessioned; *or* (c) Found in Collection (FIC). An object which has been accessioned into the collection but which cannot be located is subject to the same type of deaccessioning as if it existed, but it is not subject to disposal. "Object" does not mean property that has been

abandoned on the SCVHS campus when no staff is present (“doorstep donations”), or property accepted by an unauthorized person, or property received by SCVHS without notice by other means (e.g., through the mail). Unwanted property received under such circumstances is “rejected” and disposed of through any reasonable means.

A. Steps prior to board approval

Step 1a: The Archivist identifies an object for deaccession and brings it to the Collections Manager. If the Collections Manager disapproves of the deaccession, the action stops. If the Collections Manager approves, proceed to Step 2.

Step 1b: The Collections Manager or higher authority initiates the deaccession process. Proceed to Step 2.

Step 2: The Archivist prepares a form titled “Deaccession Proposal” which includes the following information:

- * Description of object(s)
- * Accession and catalog number(s)
- * Identification of Donor, or manner of acquisition
- * Acceptance date of donation/acquisition (how long has it been in the collection?)
- * Condition and monetary value of the object(s)
- * Rationale for the deaccession
- * Proposed disposal method
- * Notation/results of any prior proposal to deaccession the same item
- * Spaces for deaccession record number and approved disposal method
- * Signature and approval date lines for Archivist, Collections Manager, Collections Committee, Board of Directors

The rationale for the deaccession must be one or more of the criteria set forth in Subsection IV.B. Acceptable and prioritized disposal methods for standard objects are identified in Subection IV.D. Subsections IV.E and IV.F take precedence over Subection IV.D.

Step 3: The Collections Manager presents the Deaccession Proposal to the Collections Committee for consideration and voting. If the Collections Committee disapproves of the deaccession, proceed to Step 4. If the Collections Committee approves, proceed to Step 5.

Step 4: The Deaccession Proposal is marked “Rejected by Collections Committee,” dated, and kept on file for future reference. The Archivist makes note of the proceeding in the object’s catalog record for future reference. No further action is taken.

Step 5: The Collections Manager presents the Deaccession Proposal to the Board of Directors for approval. If the Board denies the proposal, the action stops. If the Board approves (with or without modifying the disposal method), proceed to Step 6.

B. Steps after board approval

Step 6: The Archivist and Collections Manager sign the Deaccession Proposal form and complete it with the relevant dates and approved disposal method as shown in Step 2, and with the deaccession record number (see Step 8).

Step 7: The Archivist attaches the physical Deaccession Proposal form to the original Donation Form and moves both to the Deaccession file. (If only part of an accession is being deaccessioned, copies of both forms are retained in both files.) The documents will be updated after disposal and permanently retained.

Step 8: In the collections database (PastPerfect), the Archivist creates a record by assigning a deaccession number, which has three parts separated by decimal points: “D” (for deaccession) followed the 4-digit year, followed by a sequential 3-digit number for that year. For example, D.2023.003 would mean the third deaccession of 2023. The deaccession record includes all of the information in Step 6 (with Collections Manager and Archivist names in place of signatures).

2. Disposal Procedures

The Board of Directors determines and approves a disposal method, and the Archivist or Collections Manager carries it out.

Standard objects as described in Subsection IV.D follow the priority set forth therein. Objects that come under Subsections IV.E or IV.F are handled in the manner described. For objects that are archaeological in nature but do not fall under NAGRPA or Cal-NAGPRA, the Archivist or Collections Manager consults with the Fernandeno-Tataviam Band of Mission Indians, which is given first right of refusal to the objects. If Fernandeno-Tataviam rejects the objects, its recommendation is solicited, and SCVHS personnel may elect to consult with additional qualified authorities to identify an appropriate recipient institution.

Following disposal, the Deaccession Proposal form is updated to reflect the action taken and date of disposal, with the recipient’s signature if applicable.

V. Incoming Loans

For the purpose of temporary, time-limited exhibition, SCVHS may borrow fine arts (e.g. paintings, works on paper, sculptures, etc.), decorative arts (e.g. dishware, textiles, jewelry, furnishings, etc.), books, archeological artifacts, anthropological artifacts, historical artifacts, natural history specimens, archival collections, photographs, and born digital materials.

SCVHS does not accept loans for its Core Exhibition or for its permanent collection.

A. Approval Processes for Incoming Loans

Requests for objects from other institutions and individuals are proposed by the Exhibition Committee. SCVHS accepts loans when they are critical for a temporary, time-limited exhibition. For policies and procedures related to incoming loans, see “Santa Clarita Valley Historical Society: Recommendations for a Community History Museum and Manual for Planning Future Exhibits, Part II: Museum Manual” (Though Projects LLC, 2023), pp. 12-16.

The Board of Directors is responsible for approving incoming loans. The Exhibition Committee identifies objects desired for temporary exhibition and works with the lending institution to negotiate the loan. The Collections Manager or other representative of the Exhibition Committee brings the proposal to the Board of Directors for approval.

The Registrar or, in the absence thereof, the Archivist is responsible for ensuring appropriate documentation for incoming loans. See “Recommendations for a Community History Museum,” cited above, for a description of the documentation process.

Note that SCVHS borrows photographs and other objects from community members on a short-term basis (usually no more than two weeks) for the purpose of digitizing them and accessioning the digital facsimiles into its collection. This so-called “borrow and scan” procedure is not considered a “loan” within the meaning of this section.

B. Terms and Conditions of Incoming Loans

Incoming loans will be accepted from individuals or institutions for Exhibition. Under established Board policy,² and because of the liability and expense, SCVHS cannot store and maintain objects belonging to others that are not required for the aforementioned purposes.

The following criteria will be met before requesting or approving an incoming loan:

- * SCVHS has determined it can afford the estimated cost of exhibition, storage, security, transportation, collection maintenance, and all risk, wall-to-wall insurance for the objects on loan at the value established by the lender unless the lender waives insurance requirements in writing. The amount payable by such insurance is the sole recovery available to the lender in the event of loss or damage.

² Standing Rule No. 13, adopted January 23, 2023.

- * If the lender prefers to provide insurance for the object while it is on loan, the lender shall list SCVHS as additional insured on its own policy or will obtain for SCVHS a waiver of subrogation.
- * SCVHS can provide care and protection that meets or exceeds standards required by the lender.
- * Only objects that can withstand the normal rigors of packing, transport, handling, and display will be accepted on loan at SCVHS. SCVHS will conduct a basic condition report upon receipt of a loaned object and prior to the object's return to the lender.
- * SCVHS will not perform any type of conservation, cleaning, reframing, repair, or other action that alters the physical condition of a borrowed object without written approval from the lender.

Objects that are not claimed by the lending individual or institution at the end of the loan period, after reasonable efforts by SCVHS to return the objects, are determined to be abandoned ("doorstep donations") and are handled in the manner described elsewhere in this document.

If an object is damaged while on loan, the damage will be documented, and the matter is handled as described in the particular loan document.

C. Long-Term Loans

SCVHS does not accept objects on indefinite term loan. A clear loan term with definite beginning and ending dates must be stated on all loan agreements. Term of loan should not exceed one year.

If objects are found in the collection that were previously deposited at SCVHS as permanent or indefinite loans, staff will make all possible efforts to contact the lender or immediate heirs of the lender to convert the loan into a gift, if the object is consistent with SCVHS's mission and collecting criteria; or return the object to the lender or the lender's heirs.

If staff cannot locate and contact an object's lender, all such efforts must be documented, and documentation is to be retained in the object's file.

If an individual or individual's heir claims ownership of a Found-in-Collection object and wishes for it to be returned, the burden of proof of ownership is on the claimant. The claimant must produce an original loan certificate in order to reclaim the object, and an heir must also produce proof of survivorship and assignment.

VI. Outgoing Loans

SCVHS may loan fine arts (e.g. paintings, works on paper, sculptures, etc.), decorative arts (e.g. dishware, textiles, jewelry, furnishings, etc.), books, archeological artifacts, anthropological artifacts, historical artifacts, natural history specimens, archival collections, photographs, and born digital materials for the purpose of exhibition, research program, and educational programs.

A. Approval Processes for Outgoing Loans

Outgoing loan requests must be reviewed by the Collections Manager. Final approval for outgoing loans must be obtained from the Board of Directors.

Outgoing loans must be documented by the Registrar or, in the absence thereof, the Archivist.

B. Criteria for Outgoing Loans

SCVHS will evaluate requests to borrow objects for the purpose of Exhibition at other institutions when the policies and facilities of those institutions meet accepted standards of security, climate control, and insurance coverage, and when proper credit is given to SCVHS. Institutions wishing to borrow objects should begin the process early (three months or more in advance) and must submit proper documentation before an agreement will be signed.

To request an outgoing loan, the requesting institution must contact the Collections Manager or Archivist either directly or through a member of the Board of Directors.

When assured that proper care and protection will be provided, SCVHS may lend objects to other institutions provided that the following criteria have been met:

1. No loans will be made to private individuals.
2. At all times, the preservation of collection objects will take priority.
3. Requests for loans should be received within the recommended period in advance of expected delivery date.
4. There are no restrictions on the requested object that preclude making the loan.
5. The object is in good condition and can withstand the stresses of travel, handling, study, and/or exhibition.
6. The loan will not jeopardize the institution's own exhibition, loan, research, and/or education programs.
7. The object is owned by the institution and not on loan to it. All objects involved in the loan are accessioned.
8. All objects involved in the loan are photographed.
9. The borrower agrees to all conditions established by the institution.

C. Duration

Loans from SCVHS will not exceed duration of six months, except in extraordinary circumstances approved by the Board of Directors.

Any extension of the loan period must be approved in writing by SCVHS and covered by parallel extension of the insurance coverage. SCVHS reserves the right to recall the object(s) from loan on short notice, if necessary. SCVHS reserves the right to cancel any loan for good cause at any time.

D. Requirements and Obligations for Borrowers

1. Object Condition

The borrowing institution must complete a written condition report upon receipt of any loaned object, with an additional condition report completed prior to return of the object to SCVHS.

SCVHS is to be notified immediately, followed by a full written report, including photographs, if damage or loss is discovered prior to, during, or after installation of object(s) into an exhibition.

2. Cost

Unless specific exceptions are made on a case-by-case basis, all costs of transportation, preparation, crating, administration and other loan-related costs are borne by the borrower.

The borrower is required to insure the loan for the value stated on its Outgoing Loan Agreement form (example attached hereto) under an all-risk, wall-to-wall policy.

SCVHS shall be furnished with a certificate of insurance (or affirmation of self-insurance if borrower is a self-insured government agency) prior to shipment of object(s). The insurance value may be reviewed periodically, and SCVHS reserves the right to increase the coverage requirement if reasonably justified.

3. Reproductions

Unless otherwise stipulated in writing, no photography or reproduction is permitted except photographic copies for catalog and publicity uses related to the stated purpose of the loan. All reproductions shall publish an SCVHS-approved credit line in near proximity to the object(s) and cannot misrepresent the object(s) in any way. SCVHS can grant permission for reproduction only to the extent of its ownership of rights. SCVHS makes no representation to borrower as to copyright, trademark, or similar interest; the responsibility for ascertaining whether any such rights exist and for obtaining all other necessary permissions remains with borrower. SCVHS is to receive two (2) copies of any catalogue or other publication in which loaned object(s) appear.

4. Additional Requirements and Obligations

Packing and shipping: Packing and transportation must utilize safe methods approved in advance by SCVHS. Unpacking and repacking by borrower must be done by experienced personnel under competent supervision. Unless approved in writing, repacking must use the same or similar materials and by the same methods as the object(s) were received.

Care and protection: Objects placed on loan must be given special care by borrower at all times to insure against loss, damage, or deterioration. Borrower must agree to meet any special requirements for installation and handling as noted on its Outgoing Loan Agreement form. No object may be altered, cleaned, or repaired without the written permission of SCVHS. Object(s) must be maintained in a building equipped to protect them against fire, smoke, or flood damage and under 24-hour physical and/or electronic security. Object(s) must not be exposed to direct or reflected sunlight; excessive light, humidity, dry conditions, or temperatures; unfiltered fluorescent lighting or other strong artificial light; and must be protected from insects, vermin, dirt, or other environmental hazards. Object(s) must be handled only by experienced personnel and be secured from damage and theft by appropriate brackets, railings, display cases, or other responsible means. Framed objects may not be removed from frames without SCVHS approval.

Objects may not be subject to technical examination of any type without the Society's written approval.

VII. Documentation

A. Collection Records

SCVHS will initiate and maintain up-to-date records of all objects under its care, including gifts, purchases, loans, or any other type of acquisition, even if temporary. Collection records are maintained by the Archivist. Collection records include, but are not limited to, accession records, registration records, catalog records, deeds of gift, loan forms, location records, condition reports, deaccession records, and inventory records.

SCVHS maintains both paper-based records and electronic records. Electronic records are managed using PastPerfect and Excel spreadsheets stored on the SCVHS server.

B. Backup System for Records

SCVHS records will be safeguarded from loss, destruction, and degradation.

The collections database (PastPerfect) is backed up to an external drive daily (any day the content changes). The information is copied onto the SCVHS server weekly. The server is backed up at least monthly to external drives which are housed off-site.

C. Inventory

To maintain, manage, and secure its holdings properly, SCVHS performs regular inventories. Full collection inventories are conducted annually by the Archivist.

VIII. Collections Care

SCVHS is responsible for the care and preservation of all objects in its custody, including all collection and loaned objects. Collections care and preservation activities are the responsibility of the Collections Manager and Archivist, in coordination with other staff and volunteers, as applicable. In addition to performing the types of care and management described in other sections of the policy, SCVHS will:

- * Carry out all legal, ethical, and professional responsibilities required to provide the necessary care for all objects acquired, borrowed, or placed in the custody of SCVHS;
- * Take measures to prevent the theft, vandalism, destruction or damage by pests, fire, water, or other elements;
- * Ensure that dedicated funds are available for collections care and conservation;
- * Maintain appropriate storage conditions within the constraints of budget and space allocation of SCVHS;
- * Monitor all storage areas to ensure appropriate environmental conditions and employ strategies to remediate any concerns;
- * Utilize offsite storage at a secure, climate-controlled facility managed by the City of Santa Clarita Public Library. Decisions regarding which objects will be sent to said facility are made by the Collections Manager, with approval of the Board of Directors;
- * Perform in-house assessments of collection objects as they are accessioned and when they are chosen for exhibition.
- * Ensure objects are physically protected through the use of secured storage areas, appropriate housings, established environmental control, and building-wide security systems;
- * Address conservation needs concerning damage or stability of collections by consulting with experts.
- * Require staff members to participate regularly in training courses and webinars and perform independent study to keep abreast of best practices in collections care and handling. The lessons learned are implemented and shared with other personnel, including volunteers, on an ongoing basis. Researchers are trained in handling procedures at the time of their visit as described in the Archive Access Policy.
- * Regularly monitor for pests and ensure that an integrated pest management program is in place to prevent or mitigate problems.
- * Practice regular housekeeping procedures throughout the building to maintain proper storage and exhibition conditions for the collections, deter unwanted pests, and expedite salvage procedures in the case of an emergency. The Archivist is responsible for ensuring housekeeping of the collections spaces is regularly completed.

- * Perform routine building inspections to ensure a secure building envelope and alleviate structural or environmental concerns. Regular maintenance duties are the responsibility of the Site Manager.

The Archive Access Policy (attached hereto) sets forth the policies and procedures for the extreme care that must be taken by both staff and researchers when handling collection objects.

The document, SCVHS Scanning Policies (forthcoming), describes the care to be taken with photographic objects.

IX. Insurance and Risk Management

A. Insurance

Although insurance is not a substitute for safety, security, or professional collections care, it does provide compensation in the event of loss or damage. SCVHS will provide insurance coverage for its buildings, general liability, and employees (workers' compensation).

The Treasurer is responsible for the review and renewal of the Society's insurance policy annually.

B. Risk Management

All collections, buildings, and grounds of SCVHS should be secure and protected from vandalism, criminal activity, and accidents.

SCVHS must conduct periodic reviews of potential risks to the collection including fire, natural disasters, vandalism, theft, human error, mechanical or operational system failure, pests, and deterioration. SCVHS should maintain regular contact with the local fire and police departments. Personnel from these agencies should be aware of the historical value and significance of SCVHS. Copies of the SCVHS's floor plans should be held at the local fire department.

SCVHS must ensure that an Emergency Preparedness and Response plan is in place to mitigate potential damage in the event of a disaster or emergency. The contents of the plan, particularly procedures, contact lists, and collections priorities for salvage and/or conservation, must be reviewed and updated periodically.

Staff will be trained in the proper use of fire extinguishers, fire drills, evacuation procedures for members of the public and staff, evacuation procedures for collections, and disaster response and recovery for collections.

SCVHS participated in its first-ever comprehensive risk assessment survey in December 2022 when the Northeast Document Conservation Center (NEDCC) performed an Emergency/Disaster Preparedness assessment. The resulting report provides recommendations that are tailored to the Society's specific needs in the following areas:

- * Emergency Preparedness Planning: The policies and procedures SCVHS should create to save lives, secure its buildings, recover assets, and make sure operations continue or are restored quickly;
- * Risk Assessment and Mitigation: The practical steps SCVHS can take to mitigate risks in a variety of areas, include human safety, facilities, and security;
- * Templates, tools, resources, and guidelines that SCVHS can use as it strengthens its level of emergency preparedness.

X. Access and Use

A. Collections Access

SCVHS recognizes its responsibility to make its collection accessible to the public for education, research, exhibition, conservation, publication, and reproduction. The imperative to provide access must be balanced with SCVHS's responsibility to preserve and safeguard its objects. Policies governing access to the collection include the physical collection materials as well as reproductions of the collection and collection documentation. Laws regarding privacy and freedom of information will be observed where applicable.

SCVHS provides open, equitable, nondiscriminatory access to its archived collections and records for legitimate study, research, inquiry, and examination by responsible parties ("researchers"). Admission is by appointment only, during established hours, limited to staff availability, and can be suspended or denied at any time.

Comprehensive policies and procedures governing access to restricted areas are found in the Archive Access Policy attached hereto and made a part hereof.

Photography of collection objects is regulated by the SCVHS Photography Policy (forthcoming). In general, the policy provides that photography with a handheld camera or phone is permitted for personal, noncommercial use only (unless prohibited by signage) in exhibition areas and other spaces that are generally accessible to the public without an appointment. Indoor flash photography, as well as tripods and light stands, are not permitted without express permission by authorized SCVHS personnel.

Restricted spaces: As described in the Archive Access Policy, cameras, including cell phones, digital cameras, video cameras, and any other mechanism for capturing sound and/or picture are not allowed in archive examination areas without the express approval of the Archivist or Collections Manager.

Commercial photography, videography, and filming requires an SCVHS Photo or Film permit. (Additional government permitting may be required.) The restriction does not apply to credentialed journalists on assignment, provided that such activity does not interfere with operations; also, except in the event of emergency or disaster, access to restricted areas requires permission from the Archivist or higher authority.

The Archivist and Collections Manager have unrestricted access to collections storage areas. Other members of the Collections Committee, and members of the Board of Directors, may access collections storage areas but should notify the Archivist or Collections Manager in advance. The Archivist and Collections Manager may authorize access for volunteers and other personnel who are assisting them under their direct supervision.

The Archivist is responsible for controlling access to buildings and storage areas by maintaining a key log.³

³ Standing Rule No. 4, adopted January 23, 2023.

B. Terms and Conditions

Members of the public may request to examine or study collection objects. Appointments must be made in advance and will take place during normal business hours. SCVHS reserves the right to revoke access privileges for any reason.

Collections are accessible contingent upon staff availability and consistent with accepted security and preservation practices. SCVHS may refuse access to certain objects in the collection and may limit the number of researchers at one time.

Users must comply with the Society's procedures regarding examination and handling of objects, personal photography, and the use or dissemination of collection information. Requests to reproduce visual images (photography and video) of the collections must be made in advance and are subject to the Society's publication guidelines and fee schedule. All image use must be credited as required, and two gratis copies of any resulting work must be provided to SCVHS upon publication. To protect the confidentiality of donors and the security of the collection, access to certain information in the object files may be restricted (e.g., donor contact and other personal information will not be provided). SCVHS reserves the right to deny access to other types of information contained in its collection records, such as insurance and appraisal values, but in all cases legal guidelines regarding privacy and freedom of information will be observed, as applicable.

XI. Intellectual Property

A. Photography and Reproduction

The copyright law of the United States (Title 17, USC) governs the making of photocopies or other reproductions or images of copyrighted material.

Collection objects are held in three areas: outdoors (e.g., buildings, railroad equipment and stock); public indoor spaces (i.e., exhibition areas); and restricted areas (e.g., archiving office, storage).

All forms of photography (still, motion) are regulated by the SCVHS Photography Policy (forthcoming). In general:

- * In publicly accessible outdoor areas, all forms of nondisruptive photography are allowed for personal, noncommercial use only.
- * In public indoor spaces, unless specifically prohibited by signage, photography with a handheld camera or phone is allowed for personal, noncommercial use only. Flash photography, tripods, and light stands are not allowed without express authorization by authorized SCVHS personnel.
- * In restricted areas, cameras, including cell phones, digital cameras, video cameras, and any other mechanism for capturing sound and/or picture are not allowed without the express approval of the Archivist or Collections Manager.

Persons wishing to photograph collection objects in a place or manner not described above are required to read the SCVHS Photography Policy and complete the associated request form. The Archivist or higher authority is responsible for approving requests for photography.

Except as noted elsewhere in this section, and with the exception of short bursts of video with a cellphone in publicly accessible areas, filming of the collection or any part thereof requires, at a minimum, the permission of the Archivist or higher authority. Depending on the nature of the filming and the intended purpose, an SCVHS Film Permit and additional governmental authorization may be required. Requestors must read the Photography Policy and complete the relevant form or permit application. The Archivist or higher authority is responsible for approving requests for filming.

Requests for photography, filming, photocopying, or scanning are made by contacting the Archivist, who may or may not be able to accommodate the request.

B. Publishing

In granting permission to publish material obtained from SCVHS, the Society does not assume responsibility for infringement of copyright or of publication rights of material which may be held by others. The publisher assumes all responsibility for claims under the Copyright Law of the United States or for libel claims which may be made as a result of the publication.

The publisher agrees to credit the "Santa Clarita History Center" as the source of reproductions in all published works, or otherwise as directed by authorized SCVHS personnel. A dissertation or thesis is considered to be a published work.

SCVHS makes no representation as to the copyright, trademark, or similar status of any object in its collection. The user is solely responsible for researching such rights and for obtaining any permissions and/or paying any fees necessary for the proposed use.

Permission to publish reproductions obtained from SCVHS is requested by contacting the Archivist or Collections Manager. The Collections Manager or higher authority is responsible for approving requests for publication.

Permission may be granted for one-time publication use only. In granting permission to publish, SCVHS does not surrender its own right to publish any of the materials in its collection or to grant publication permissions to others.

Furnishing/Collections Plan for Buildings

Santa Clarita Valley Historical Society

SPRR Saugus Depot

Brief History: Southern Pacific depot at Saugus from 1888 to 1978 – moved in 1980 to the Santa Clarita History Center (“SCHC”).

Interpretation: Saugus Depot as it existed during its most active period, from the 1917 remodel to (just before) the 1958 remodel. Target: its appearance in “Suddenly” (1954). Using (basically) the common standard paint scheme adopted by SP in 1937. Upstairs rooms are to be outfitted as bedroom/living room spaces from the period. **Also:** All local depots & passenger shelters (from Piru to Vincent); attributes of passenger & dining cars and locomotives that would have stopped at Saugus; local railroad stories (e.g., Lang); possibly local dinky rail lines (e.g., Sterling Borax). **Exceptions:** Baggage Room is a modern archiving office; Freight Room is a meeting/classroom space with depot/railroad-related displays around the perimeter and on the walls.

Collections: Originals and replacements (not replicas!) of everything that would have been, or could have been, in the Saugus depot – or which stopped there – during the target period, including SP, Wells Fargo/ARE/REA, Western Union, Pullman. Saugus Depot-related movie memorabilia. **Also:** Other local depots, etc., as identified above. **Also:** Generic (company-wide) SP materials from 1888 to 1980 (and beyond 1980 for the sake of completing collections such as all issues of the SP Bulletin).

Things to Avoid: Other railroads (SP only)! Location-specific SP materials that don’t relate to our location, such as the wrong SP Divisions (we were Los Angeles Division and San Joaquin Division only); other SP lines (Zephyr, Coast Line after 1904, Ogden, Texas, etc.).

Rail Yard

Interpretation: SP-related railroad features from the Steam Era (ended 1957).

Caboose: A Southern Pacific Class C-40-3 steel cupola caboose built in 1942 and used until the 1980s. Ran on our rail line (L.A.-Bakersfield) and in Northern California. Lettering scheme should match the day it rolled out of the L.A. Shops in 1942. Original and replacement (not replica!) artifacts consistent with Steam Era so it’s compatible with our mogul locomotive.

Pardee House

Brief History: Built by H.C. Needham in 1890 on Pine Street as a lodge. Moved to the Newhall/Walnut/Market triangle in 1893 where it was enlarged to become the Pardee family home. Then in succession: telephone company office, Boys (and later Girls) Club headquarters facility, Chamber of Commerce headquarters.

Moved in 1992 to SCHC.

Interpretation: Primarily repurposed as a general SCV History Museum.

Collections: A permanent exhibit, rotating museum exhibits, conference room, and office space. Potentially: Photos & artifacts relating to the various owners of the house displayed in conference room area, such as Pearle Pardee's personal household items. Could display Pacific Telephone & Telegraph (PacTel) artifacts, Chamber of Commerce and BG Club photos.

Newhall Ranch House

Brief history: Kitchen area (the wing closest to today's train tracks) started in 1865 near today's Magic Mountain amusement park as the headquarters of the Rancho San Francisco. Enlarged to its present form circa 1895 by Newhall Land. Remained the ranch headquarters, lived in by ranch foreman's (or worker's) family, until 1970s. Moved to SCHC in 1990.

Interpretation: A working ranch house from the late Victorian era (1890s-1900s). **Exception:** Upstairs could be used as museum space featuring installations of various old-time crafts (e.g., weaving, candle making, blacksmithing).

Collections: Artifacts consistent with a working ranch house from the late Victorian era (1890s-1900s). If the second story is used for craft exhibits, collections would include the requisite tools and other artifacts that might or might not have been used in the SCV historically.

Edison House

Brief History: Built in 1929 as replacement for another house lost in the flood. Edison company house until abandonment & sale in 1972. Moved 1989 to SCHC.

Interpretation: Edison company house in the 1930s-1940s.

Collections: Residential features consistent with a working-class company house during the period of interpretation. Could be used to feature Edison Company information & artifacts (incl. phonographs) and St. Francis Dam Disaster history.

Things to Avoid: Furniture and artifacts that wouldn't have been used on the West Coast.

Kingsburry House

Brief History: Built in Newhall in 1878 at the direction of Henry's cousin J.O. Newhall, the local hotelier. Subsequently owned and occupied by prominent local citizens (which is relative; Newhall's population was so small, everyone was "prominent"). Moved 1987 to SCHC.

Interpretation: A middle-class Victorian house in the 1880s-1890s.

Collections: Residential features consistent with a middle- or upper-middle-class home during the period of interpretation.

Things to Avoid: Furniture and artifacts that wouldn't have been used on the West Coast.

Red Schoolhouse

Brief History: Probable late-1800s mining shack repurposed by Robert E. Callahan in 1927 as an early schoolhouse for his Mission Village auto park in Culver City; moved 1960s to Agua Dulce; moved 1987 to SCHC.

Interpretation: A one-room California schoolhouse as it would have been outfitted in the late 1800s. Could be used to tell the story of early automobile tourism.

Ramona/Desert Chapel

Brief History: Replica chapel designed by composer Carrie Jacobs Bond and built by Robert E. Callahan in 1926 as an attraction at his Mission Village auto park in Culver City; moved 1960s to Agua Dulce; moved 1987 to SCHC. Previously called "Desert Chapel" by Callahan.

Interpretation: A Victorian chapel as it might have been outfitted in the late 1800s. Could be used to tell the story of early automobile tourism.

Collections: Artifacts donated to Callahan by Bond, including pump organ, candelabra, etc. (Should display photograph of Callahan and Bond sitting together in the chapel.)

Tom Mix Cottage (Prospective)

Brief History: Commercial building at today's 24247 Main Street associated with Tom Mix studio at the Newhall Triangle (Market/Walnut/Newhall). Erected ~1916 (the year Mix arrived in Newhall), although Assessor records say 1920. Probably not used by Mix after mid-1920s; subsequently a retail space. Probably to be placed next to Kingsburry House.

Interpretation: Repurposed as a general SCV Film Museum.

Collections: Materials appropriate to the history of filming in SCV, with lots of Tom Mix paraphernalia to tell the building's "house museum" story.

NOTES

Artifacts and furnishings with local historical provenance are preferred. If, for example, a house museum calls for a period-appropriate refrigerator and has been furnished with a refrigerator of non-local or unknown provenance, and if the Society has an opportunity to possess an equally suitable refrigerator with strong local provenance, then the non-local refrigerator should be deaccessioned and replaced with the local refrigerator.

HOW TO HANDLE OLD LOANS

(Personal Property Loaned to the Santa Clarita Valley Historical Society)

NOTES:

Current Society policy prohibits acceptance of collection items on loan (except for items needed for temporary, short-term museum exhibits, preferably from lending institutions); and current policy requires the extinguishment of “old loans” (i.e., convert them to gifts or dispose of them, preferably by returning them to the lender). In this document, the words “donor” and “lender” are interchangeable.

In all cases, include a copy of the original donation/loan form, if such exists, in the mailing to the lender.

For the items the Society wants either to discard or return to the donor:

Follow the instructions in Part 1. “Proof of receipt” means, for example, “Return Receipt” (USPS).

For items the Society wants to keep:

See Part 2. The Society sends both the “Notice of Intent to Preserve an Interest” form and the Society’s “Deed of Gift” form to the lender. The Society’s cover letter explains the purpose of the two forms and instructs the lender to pick one or the other to complete and return: Either the lender wants the property returned (Notice of Intent to Preserve and Interest) or wants to relinquish ownership and allow the Society to keep the item(s) as the Society’s own property (Deed of Gift). The cover letter should explain that the purpose of the “Notice of Intent” form is to establish/maintain the owner’s interest in the previously loaned item(s) and should not be construed as a willingness or ability on the part of the Society to perpetuate the loan.

Parts 2C and 2D below are not applicable under current Society policy. They are included here in the event Society policy changes in the future.

The above reflects current Society policy as of December 2022.

1: Loaned items to be returned or discarded

For property that SCV Historical Society (“Society”) wants to either return or discard, then this is the process.

The Society gives the donor notice that Society wants to terminate the loan. Notice is sent to the donor at the last known address along with proof of receipt. Registered or certified mail is not required. If no receipt is returned to the Society within thirty days of mailing, then Society must publish notice at least once a week for three successive 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.

Notices must have the following:

- A. "The records of the Santa Clarita Valley Historical Society indicate that you have property on loan to it. The institution wishes to terminate the loan. You must contact the institution, establish your ownership of the property, and make arrangements to collect the property. If you fail to do so promptly, you will be deemed to have donated the property to the institution. See California Civil Code Sections 1899, et seq."
- B. Notices must also contain the lender's name, the lender's address, if known, the date of the loan and, if the notice is being given by the museum, the name, address, and telephone number of the appropriate office or official to be contacted at the museum for information regarding the loan.

If the Society does not hear back from the donor, then the Society may discard the property. If the donor responds, then the Society can return the property to the donor.

2: Loaned items to be kept by the Society

If the Society wants to keep the property, then it should follow these steps. It needs to send the following notice to the donor.

- A. Same rules apply as above: Notice is sent to the donor at the last known address along with proof of receipt.
- B. A letter to the donor with this information: Museum's name, address, email address, web address, and telephone number; Lender's name, address, email address, and telephone number; Owner's name (if different from the Lender), address, email address, and telephone number, if different from lender; Artist's (if any) name, address, email address, and telephone number; Identification and description of donated property. The letter should notify the donor of the Society's desire to keep the loaned item(s) in its collection unless it is notified in writing by the donor that the donor wants to have the loaned property returned to the donor. If the donor wants the property back, then the donor must complete the attached form and return it to the Society. The form is attached here.
- C. If the donor wants the Society to keep the loaned item on loan for more than seven years, then Society should notify the donor of the terms and conditions for the loan.
- D. If the Society is keeping the donated item on loan, it must notify the donor if the item is ever damaged, destroyed, or lost.
- E. Society must return the item if the donor wants it back.

Parts 1 and 2 prepared by Kanowsky & Associates, December 2022

OUTGOING LOAN AGREEMENT

The Santa Clarita Valley Historical Society agrees to loan the item(s) described herein, subject to the conditions set forth herein, to *(type or use BLOCK LETTERS)*:

BORROWER	
DATES OF LOAN	From: _____ To: _____
EXHIBITION/PURPOSE	
DESCRIPTION OF ITEM(S)	*Number of pages attached (including photographs), made a part hereof: _____
EXHIBIT LOCATION	
PACKING & TRANSPORTATION	
INSURANCE	
INTALLATION/PREPARATION BY	
CREDIT LINE	(check) ____ "Santa Clarita Valley Historical Society Collection" OR ____ Other:
SPECIAL REQUIREMENTS/OTHER	(enter "n/a" if none)
APPROVAL	SCVHS Board approval date of loan: _____

This loan is agreed to by the undersigned, subject to the conditions set forth in this Agreement, which consists of two (2) pages and any attachments identified above:

BORROWER

Signature

Date

Print Name

Title

SANTA CLARITA VALLEY HISTORICAL SOCIETY ("LENDER")

Signature

Date

Print Name

Title

CONDITIONS GOVERNING OUTGOING LOANS

Care and Protection. Borrowed item(s) shall be given special care at all times to insure against loss, damage or deterioration. Borrower agrees to meet any special requirements for installation and handling as noted on the face of this Agreement and/or in any attachments. Upon receipt and prior to return of the item(s), Borrower shall make a written record of condition. Lender is to be notified immediately, followed by a full written report, including photographs, if damage or loss is discovered. No item may be altered, cleaned or repaired without the written permission of Lender. Item(s) shall be maintained in a building equipped to protect item(s) from fire, smoke or flood damage and under 24-hour physical and/or electronic security. Item(s) shall not be exposed to direct or reflected sunlight; excessive light, humidity, dry conditions, or temperatures; unfiltered fluorescent lighting or other strong artificial light; and shall be protected from insects, vermin, dirt, or other environmental hazards. Item(s) shall be handled only by experienced personnel and be secured from damage and theft by appropriate brackets, railings, display cases, or other responsible means. Framed items may not be removed from frames without Lender's approval. Items shall not be subject to technical examination of any type without Lender's written approval.

Insurance. Item(s) shall be insured during the period of this loan for the value stated on the face of this Agreement under an all-risk, wall-to-wall policy subject to the following standard exclusions: wear and tear, gradual deterioration, insects, vermin or inherent vice, repairing, restoration, or retouching process; hostile or warlike action, insurrection, rebellion, nuclear reaction, nuclear radiation, or radioactive contamination. Lender shall be furnished with a certificate of insurance (or affirmation of self-insurance if Borrower is a self-insured government agency) prior to shipment of item(s). Lender shall be notified in writing at least 20 days prior to any cancellation or meaningful change in Borrower's policy. Any lapses in coverage, failure to secure insurance and/or any inaction by Borrower regarding notice does not release Borrower from liability for loss or damage. Insurance value may be reviewed periodically. Lender reserves the right to increase coverage if reasonably justified. In the event of loss or damage, Borrower's maximum liability shall be limited to the insurance value then in effect.

Reproduction and Credit. Each item shall be labeled and credited to Lender as indicated on the face of this Agreement. Unless otherwise stipulated in writing by Lender, no photography or reproduction is permitted except photographic copies for catalog and publicity uses related to the stated purpose of the loan. All reproductions shall publish Lender's approved credit line in near proximity to the item(s) and cannot misrepresent the item(s) in any way. Lender can grant the permission for reproduction of item(s) borrowed only to the extent of its ownership of rights in relation to the request. Photographs of certain items may be protected by copyright, trademark, or related interests not owned by Lender. The responsibility for ascertaining whether any such rights exist and for obtaining all other necessary permissions remains with Borrower. Lender is to receive two (2) copies of any catalogue or other publication in which loaned item(s) appear.

Packing and Shipping. Packing and transportation shall be by safe methods approved in advance by Lender. Unpacking and repacking shall be done by experienced personnel under competent supervision. Repacking shall be done with the same or similar materials, and by the same methods as the item(s) were received. Any additional instructions shall be followed.

Costs. Unless otherwise noted, all costs of transportation, preparation, crating, administration and other loan-related costs shall be borne by Borrower.

Return/Extension/Cancellation. Item(s) shall be returned to Lender in satisfactory condition by the stated termination date. Any extension of the loan period must be approved in writing by Lender and covered by parallel extension of the insurance coverage. Lender reserves the right to recall the item(s) from loan on short notice, if necessary. Lender reserves the right to cancel this loan for good cause at any time and will make every effort to give reasonable notice.

ARCHIVE ACCESS POLICY

Santa Clarita Valley Historical Society

The Santa Clarita Valley Historical Society (“SCVHS”), a 501(c)(3) nonprofit organization, collects a wide variety of 2-dimensional, 3-dimensional, born-digital, and audiovisual items pertinent to the area¹ and holds them in trust for the public. In furtherance of its purpose to preserve and share the culture and history of the Santa Clarita Valley,² SCVHS makes its collections available through exhibitions; publicly accessible digital formats including an online archive; and access to its physical archive, which exists in multiple locations. As a responsible steward with an obligation to preserve its collection items for the benefit of future generations, SCVHS has established this policy to regulate access to items in the physical archive.

Requesting Access

To the best of its ability and means, SCVHS provides open, equitable, nondiscriminatory access to its archived collections and records for legitimate study, research, inquiry, and examination by responsible parties (“researchers”). Admission is by appointment only, during established hours, and limited to staff availability.

All requests for access must be approved by the Archivist or Collections Manager. Access is generally reserved for individuals, other public museums and libraries, government agencies and their agents,³ and nonprofit entities organized under section 501(c) of the Internal Revenue Code. Scholarly and student access is given priority over non-scholarly visitor access.

No commercial or promotional use of collection items or SCVHS records, or images resulting from their examination, is allowed without written permission by the Collections Manager or higher authority. Bona fide journalistic use of unrestricted images and information by credentialed journalists on assignment is typically accommodated by verbal consent of the Archivist or Collections Manager. “Restrictions” identified below apply in all cases.

Researchers are required to read and consent to the terms of this Archive Access Policy upon their initial visit to the archive, and upon their next visit following an amendment to it (which will be brought to their attention by SCVHS staff), by affixing their signature at the bottom. Infringement may render the researcher liable to exclusion from the archive.

Researchers must also complete an Archive Registration Form (attached) upon their initial visit to the archive, and thereafter on their first visit in each calendar year. Through the Archive Registration Form, the researcher agrees to indemnify and hold harmless SCVHS and its personnel from and against any claims and actions arising out of the researcher’s use of any archival materials or reproductions thereof.

Researchers must be at least 18 years old. At the discretion of the Archivist or Collections Manager, minors age 14 and older who are conducting research for a legitimate school project may be granted access if accompanied by a parent or guardian who completes and signs the requisite forms and accompanies the minor at all times.

The Archivist maintains a log to record the date, the researcher's identity, the subject matter examined, the name of the assigned staff supervisor, and any fee paid.

House Rules

Examination of archival material is restricted to one or more areas designated for this purpose ("examination area"). No archival material may be removed from the examination area at any time. Researchers shall be supervised by SCVHS personnel at all times, unless specific authorization to the contrary is granted by the Archivist or Collections Manager.

Upon arrival, visitors must sign the (physical) guest register and should identify the items they wish to examine with the help of finding aids made available to them. Once the items have been identified, Archive staff will either produce them for examination or escort the researcher to an examination area in or near the items' location.

Researchers must use extreme care when handling collection items. Many items are fragile, valuable, and irreplaceable.

- Researchers are not allowed in the stacks, records holding areas, or other staff-only locations without the express approval of the Archivist or Collections Manager.
- Researchers are expected to preserve the existing arrangement of the material within folders, boxes, and other storage media. If anything appears to be misfiled, the researcher should not attempt to move it, but rather call it to the attention of the Archivist.
- No smoking, eating, or drinking are allowed in the examination area.
- Only pencils and personal computer devices such as laptops and tablets may be used to record data. No pens, ink, erasable ink, or self-stick removable notes may be used. Computer devices are not supplied by SCVHS.
- Tracing from or writing on archival materials is not permitted.
- Researchers may not clean or otherwise alter an archival item in any way.
- Cameras, including cell phones, digital cameras, video cameras, and any other mechanism for capturing sound and/or picture, are not allowed in examination areas without the express approval of the Archivist or Collections Manager. All forms of photography are subject to the SCVHS Photography Policy.
- The following personal items are not allowed in examination areas:
 - Overcoats, raincoats, ponchos, hats, other outer wear (see exceptions below), dirty or muddy clothing including footwear, footwear with wheels;
 - Folders, bags (see exception below), backpacks, fanny packs, purses, money belts, boxes, briefcases, suitcases, satchels, equipment bags, laptop cases;
 - Food and beverages (anything consumable), hand sanitizer, lotions, lip balm, E-cigarettes, liquids of any kind;
 - Pens (including ballpoint, felt tip, and markers), envelopes, cups (paper or plastic), adhesive backed notes (Post-it type), adhesive tape, paper clips, rubber bands, metal rulers, rubber fingers.
- The following personal items are allowed in examination areas:

- Vests with small exterior pockets, sweaters and sweatshirts (with or without hoods), scarves, suit coats, sports jackets, blazers, hats (for medical or religious reasons only), religious vestments or regalia;
- Clear (see-through) plastic bags that are 10" x 10" or smaller and used to carry electronics and authorized medications;
- Handheld wallets and coin purses for carrying currency and coins, credit cards, keys, driver's license, and other identification cards;
- Loose paper, research notes, SCVHS-provided documents.

Personal property including notes, copies, equipment cases, computer devices, phones, cameras, other recording devices, outer wear, purses, briefcases, and other property are subject to inspection by staff or security guards when entering and leaving examination areas or SCVHS facilities.

Permission to examine items and records does not automatically include the right to photocopy. SCVHS may decline a request for photocopying because the materials are too fragile, too large, or fall outside of the "fair use" standard; or because a photocopy machine is not available. All photocopy requests must be approved by the Archivist, and a per-page fee applies.

All SCVHS personnel have the right to limit or deny access for researchers who violate the rules. Researcher privileges are subject to suspension or denial for those who physically or verbally abuse SCVHS personnel or any other researcher or visitor.

Restrictions

SCVHS reserves the right to restrict access to the archive for any reason. Among the factors SCVHS staff will consider when deciding whether to permit access to collection items are: the condition of the archival materials requested; the number of materials requested; the purpose of the access; the sensitivity of the archival items' contents; resource limitations; security; object availability; intellectual property requirements; applicable restrictions; and preservation constraints.

Unprocessed items are not generally available for research. Items that are not yet accessioned must be accessioned before researchers can be granted access to them. The timing of all accessioning is at the discretion of SCVHS. However, SCVHS tries to prioritize the accessioning of items upon request by researchers.

Sensitive collection items and confidential information contained in SCVHS records, including but not limited to those which are governed by statutes that restrict public access to certain information, are not available for examination by unauthorized persons. Some examples include, without limitation: confidential donor information (address, telephone number); certain Native American cultural materials; items or records that would reveal the precise locations of archaeological sites.

Due to staff constraints, the Archivist or Collections Manager may limit the quantities of material examined at one time. In extraordinary circumstances, upon the sole determination of SCVHS personnel, and with advance notice to the researcher, SCVHS may require a fee to cover the cost

of supervisory staff time for the examination of a large body of material over multiple hours. This hourly fee is noted in the Archive Registration Form.

Copyright

SCVHS makes no representation or warranty as to the copyright status, trademark status, or any other intellectual property right associated with any item in its collections. Researchers are solely responsible for determining the nature of any rights and the ownership or interest therein, paying any associated fees, obtaining permission to publish or use, and determining the nature of any possible liabilities that may result from the unauthorized publishing or use of items or records found in the SCVHS archive, or reproductions or facsimiles thereof.

Payment of fees to SCVHS to cover any cost, including without limitation the cost of photocopying, does not constitute and should not be considered permission to reproduce copyrighted works.

Citation

Access to and use of collection items and records shall be credited appropriately in all publications, exhibitions, and other presentations, unless expressly directed not to do so by SCVHS staff. SCVHS staff will provide researchers with a suggested form of citation credit.

Accessibility Alternatives

Alternatives to access to the physical archive include the following:

- Tens of thousands of SCVHS collection items and records are available to the public through a highly accessible digital archive (SCVHistory.com), which continues to grow.
- Archive staff are able to provide intellectual access to researchers by using a collections inventory database to search for all accessioned items and provide the catalog data.
- An online finding aid for all accessioned collection items is in development.

Affirmation

I have read and agree to abide by the regulations and procedures set forth in this Archive Access Policy.

Signature: _____

Name: _____

Date: _____

-
1. *See Collections Management Policy, Subsection II.B.: Description and Scope of Collection.*
 2. *See Mission and Vision Statement.*
 3. *“Agents” in this context means personnel of a government agency or of a non-government entity that is preparing documents and/or information for submittal to a government agency for review and approval, such as environmental impact reports.*