

## **Westerly Historical Society Collections Policy**

P.O. Box 91, Westerly, RI, 02891

124 Granite Street, Westerly, RI, 02891

**Approved by Motion of the Executive Board, February 5, 2025**

### **1) Introduction**

The mission of the Westerly Historical Society (hereafter referred to as “the Society”) is to promote a study of the history of Southern New England, and encourage the collecting and preserving of manuscripts, pamphlets, images, artifacts and multi-media materials, especially those relating to Westerly and vicinity.

### **A) Collecting Scope**

The Society collects items related to Westerly and its villages as well as to downtown Pawcatuck. This includes items related to individuals who lived in Westerly.

The Society is also interested in collecting items of significance to Rhode Island history that provide context for Westerly history or individuals. Specific subjects collected include, but are not limited to, information and items related to local cemeteries, local businesses, steamer transit, etc.

The Society also maintains its own organizational history, including meeting minutes, newsletters, monthly reports, program information, policies, annual financial reports, publications, and records of special events.

### **I) Time Period**

The Society is committed to collecting items from all periods in local history up to the present day.

### **II) Types of Items**

The Society collects items including, but not limited to, manuscripts, records, correspondence, books, maps, photographs including glass plates and negatives, scrapbooks, newspapers, postcards, ephemera, artwork, directories, and school yearbooks.

Because of limited storage capacity, the Society is selective in its decisions to collect furniture, sculpture, and other three-dimensional objects.

The Society generally does not collect items related to the granite industry, Babcock or Smith families, textiles, bibles, the military, or flags, and will refer these offers to other local organizations as noted in § 1(A)(III). Additionally, the Society generally does not collect automobiles, plants or animals, machinery, real estate, electric-powered equipment, weaponry, or anything else potentially hazardous, but may choose to do so on a case-by-case basis.

The Society generally does not retain collections of loose clippings from the *Westerly Sun*, as those articles can be located using the *Sun* index and microfilm at the Westerly Public Library.

**III)** If the Society chooses not to accept any items for any of the reasons stated in §§ 1(A)(II) or 2(B)(I) through (VII) or for any other reason, the Archivist of the Westerly Historical Society (hereafter referred to as “the Archivist”), whenever possible, shall attempt to assist the donor in finding a suitable home locally to accept the potential donation.

**IV)** In determining whether to accept any items, the Society shall grant higher priority to items which support the Society’s mission and encourage and promote research, exhibition, and educational goals.

## **B) Role of the Archivist**

The Archivist is responsible for the following:

**I)** Preserving and maintaining the Society’s existing collections;

**II)** Arranging for the acquisition of new items for the collections;

**III)** De-accessioning items from the Society’s collections; and,

**a)** This process will also involve the Archives Committee as deemed necessary.

**1)** The Archives Committee shall be composed of no less than two (2) members of the Executive Board (“the Board”) in addition to the Archivist.

**IV)** Determining if potential donations meet the criteria for selection and acceptance (see §§ 2(B)(I) through (VII)).

## **2) Process of Acceptance**

### **A) Accession Policies**

**I)** The donor of any item(s) bequeathed to the Society must possess free and clear title to said item(s) prior to donation.

**a)** For the purpose of this Policy, “free and clear title” means that the purported owner is the sole and undisputed owner of the item(s) and that no other party may have a legal claim to the item(s).

**II)** The Society does not provide valuation estimates.

**III)** Gifts shall be outright and unconditional unless conditions are agreed upon by the Board in a majority vote.

**a)** For the purpose of this Policy, “outright and unconditional” means without constraint, stipulation or restriction.

**IV) Sensitive and Restricted Materials** – The Society may accept items containing information deemed sensitive and requiring restricted access.

- a) Access to these items may be granted at the discretion of the Archivist.
  - b) Items deemed sensitive include those which contain:
    - 1) Personal or identifying information on living persons (at the request of the individual or at the Archivist's discretion)
    - 2) Criminal records of living individuals
    - 3) Donations that are requested to be restricted by the donor.
  - c) All restricted items are to be marked as such with the word "RESTRICTED" written clearly on the folder, container, or other storage medium for the restricted item.
  - d) Portions of a collection may be considered restricted without the entire collection being deemed restricted.
- V) The Society may acquire objects through purchase at the Archivist's discretion using funds within the annual Archives budget agreed upon by the Board.
- VI) The Society may acquire inventory by trade with other collecting institutions, provided that:
- a) All items offered for exchange are de-accessioned and properly recorded; and,
  - b) All exchanges are considered equitable and in the best interest of the Society.
- VII) Donated items become the property of the Society.
- a) For the purpose of this Policy, "property" means an item or items over which the Society possesses full legal right unless otherwise noted.

## **B) Criteria for Selection and Acceptance**

- I) Items accepted into the Society's collections must have a free and clear title.
  - a) Donors may be asked to sign a deed of gift form at the discretion of the Archivist.
  - b) Donors may be asked to present proof of ownership at the discretion of the Archivist.
- II) The Society does not provide estimates of the value of any items. If a donor requests a valuation of item(s) to be donated, they must seek an independent appraisal.
- III) The Society only accepts items which it is equipped to properly care for and store.
- IV) The Society only accepts unrestricted gifts and donations unless the conditions are agreed upon by the Board in a majority vote.

V) Condition shall be considered when making a determination regarding whether to accept an item for donation. It will not be the sole determining factor in this decision.

VI) The Archivist may reject a donation at their discretion; however, while an explanation for this rejection may be provided to the prospective donor, it is not required.

### 3) **Record Keeping**

A) All items incorporated into the collection will be assigned a unique object identification number and records relating to these items will bear the assigned number, on both their storage and the item itself when possible.

I) The numbering system of items as of May 2016 is YYYY.####a

II) In the above example, the year (YYYY) is the year in which the item was accessioned. If the year of accession is not known, the year is replaced with an 'x.'

III) In the above example, the number following the year is the number in order of accession for that year with letters used to indicate multiple items under the same object identification number.

a) Example: 2020.0058c would be the fifty-eighth (58<sup>th</sup>) object record created in 2020 and would represent the third (3<sup>rd</sup>) item in a series of items.

B) Accepted items will be acknowledged with a formal letter and gift receipt signed by the Archivist, upon request.

C) Records for each object shall contain:

I) Accession Number;

II) Description of the item;

III) Source of the item (when possible);

IV) Approximate date of the item when known; and,

V) Location of where the item is stored.

D) A second copy of all records will be maintained by the Archivist in a separate location from the primary copy.

### 4) **Reproduction Policy**

A) Upon request, the Archivist may provide reproductions of an item in the collections, provided the following conditions are met:

I) Any images that are provided which will be reused for any form of public display must provide credit to the Society.

II) The appropriate fee, as dictated by the fee schedule included below, has been paid.

Type of Research	Fee/Hour
General Inquiry (WHS Member)	1 hour or less Complimentary
General Inquiry (WHS Member)	\$20.00 per subsequent hour
General Inquiry (Non-Member)	30 minutes or less Complimentary
General Inquiry (Non-Member)	\$15.00 per subsequent half hour
In-depth Research Inquiry	\$25.00 for first hour and \$40.00 for each additional hour thereafter
Photo Reproduction Request <sup>1</sup>	30 minutes or less Complimentary
Photo Reproduction Request <sup>2</sup>	\$15.00 per subsequent half hour
8" x 10" print	\$25.00
11" x 17" enlargement	\$40.00
Shipping and Handling for photo reproductions	\$4.00

a) General Inquiries consist of locating available information in the Society's collections regarding a particular individual, business, or event.

b) In-depth research inquiries involve broader requests, including all available information on a particular family, surname, series of events, or period of time.

III) If any images or information provided from the Society's collections are to be used for the development of a book, pamphlet, or similar item, a copy of the finished product shall be added to the Society's collections.

## 5) Process of Deaccessioning

### A) Criteria for Deaccessioning

I) When items in the collection are determined not to fit this Policy;

II) If it is determined that the Society cannot adequately care for an item; or,

a) If the item to be deaccessioned is considered to be of significant historical value, the Archivist will make all reasonable effort to find an appropriate repository for the item.

III) When an item is determined to be permanently lost from the collection because of theft or documented disappearance.

B) The following is the process to be used in deaccessioning:

---

<sup>1</sup> Purchaser signs acknowledgement that he or she will use the image for personal use only and not resell images

<sup>2</sup> Purchaser signs acknowledgement that he or she will use the image for personal use only and not resell images

- I) The Archivist shall compile a list of items recommended for deaccession, including descriptions, any information about the original donors, and the reason(s) why deaccessioning is recommended.
- II) The Archivist shall present the list and items to the Board for vote at a regularly scheduled Board Meeting.
- III) The vote should be recorded in the meeting minutes, and the list of deaccessioned items should be retained with those minutes.
- IV) Once the Board has voted to approve deaccessions and the method of disposal of the artifacts, the Archivist will attempt to find another appropriate nonprofit home for the material, such as a historical society or museum, and will transfer/donate the items at no cost to the new owner.
  - a) If a nonprofit is not available to accept the items, then the Society will sell the item(s) publicly through a consignment store or online auction and return any proceeds to annual Archival budget.

- C) If the Society accepts an item which duplicates a current holding and the newly-accepted item is of higher quality or condition, the Archivist may consider deaccessioning the item of lesser quality or condition.

## 6) **Loan Policy**

- A) The Society may loan items to other historical societies, museums, or institutions who file a formal loan request.
- B) All potential loans must be brought before the Board at a regularly scheduled board meeting or a special meeting in which a quorum is present as defined by the By-laws of the Society.
- C) The board or the Archivist may prevent any item in the Society's collections from being loaned for any reason.
- D) The recipient of the loan is required to sign an official loan contract which stipulates conditions of the loan and terms of its use.
  - I) All loan contracts must be kept on file in the Society's archives indefinitely unless the item in question is deaccessioned or otherwise properly removed from the Society's collections.
- E) All loaned item must be:
  - I) Cataloged as such in the Archival database software; and,
  - II) Documented for any pre-existing defects or damage.
- F) All loaned items are to officially and legally remain the property of the Society.
- G) All loans are for an initial period of six (6) months although the contract may be renewed for an additional six (6) months.

- H) Upon confirmation by the Board, items may be loaned for an indefinite period. Such loans may be recalled upon request by the Board.
- I) All loans that are displayed publicly or published in any way must be credited to the Society.
- J) In the event that an item is returned from a loan to the Society in an unsatisfactory condition (i.e. damaged, stolen, etc.), the recipient of the loan may be subject to legal or financial action.

7) **Changing this Policy**

A request to change this Policy can come from any member of the Society. The change will be discussed and reviewed by the Archives Committee, which will make a recommendation to the Board. The Board will then conduct a vote as to whether the Policy should be amended as proposed.