



Sons of the American Revolution Museum Collection Management Policy

Adopted by Museum Board, September 27, 2018

Approved by NSSAR Trustees, March 2, 2019

Overview

The Museum Board oversees and maintains the National Society of the Sons of the American Revolution (SAR) Museum collections at 809 W. Main Street, Louisville, KY 40202. This policy is designed to provide general guidelines for the SAR's permanent collections, objects on loan, objects in temporary custody, and the proper procedures for handling museum objects as well as proper operating procedures in accordance with the American Alliance of Museums (AAM) guidelines.

As stated in its Congressional Charter [36 U.S.C. Chap. 1533], the purposes of the National Society of the Sons of the American Revolution are patriotic, historical, and educational, and include those intended or designed:

1. to perpetuate the memory of the men who, by their services or sacrifices during the war of the American Revolution, achieved the independence of the American people;
2. to unite and promote fellowship among their descendants;
3. to inspire them and the community at large with a more profound reverence for the principles of the government founded by our forefathers;
4. to encourage historical research in relation to the American Revolution;
5. to acquire and preserve the records of the individual services of the patriots of the war, as well as documents, relics, and landmarks;
6. to mark the scenes of the American Revolution by appropriate memorials;
7. to celebrate the anniversaries of the prominent events of the war and of the Revolutionary period;
8. to foster true patriotism;
9. to maintain and extend the institutions of American freedom; and
10. to carry out the purposes expressed in the preamble to the Constitution of our country and the injunctions of Washington in his farewell address to the American people.

Scope of Collections Statement:

The Sons of the American Revolution, in order to tell the story of the American Revolutionary War and the founding of the United States of America and its constitutional system, seeks to collect historic artifacts, personal affects, documents, weapons, flags, paintings, sculptures, and other memorabilia, in both two and three-dimensional objects that interpret the historical period of the American Revolution.

The SAR headquarters includes a 7,106 square feet museum gallery space, the SAR Genealogical Research Library, offices and meeting rooms, and artifact storage space at 809 W. Main, Louisville, KY. The museum collection includes artifacts, personal affects, muskets, rifles, swords, flags, paintings, and sculptures. Additionally, historic documents are managed by the Library and Archives Committee as part of the SAR Genealogical Research Library's Archives and the Institutional Collection managed by the Historian General.

Authority and Responsibility for Collections

The possession and SAR's use of collections impose legal and ethical responsibilities to provide proper management, preservation, and use. The responsibility for the Museum collections rests with the SAR Museum Board, whose written policies are approved by the SAR Board of Trustees. Collectively, these bodies must assure that personnel, facilities, equipment and support are reasonably allocated to meet the SAR's ongoing needs.

As established in the National Society Sons of the American Revolution Bylaw 19, Section 1, article (h), a standing committee within the SAR will be the Museum Board. The Bylaw states: *The purpose of the Museum Board shall be to collect, preserve, conserve, manage, interpret and exhibit articles of the historical period of the American Revolution (1763-1801). In accomplishing this purpose, the National Society's Headquarters shall function as the primary resource to both the Society's membership and the general public for education on the American Revolution primarily through storied standing and temporary exhibitions.*

The Museum Board must also assure that prudent collections management policies are established, implemented, and monitored. Written policies established by the Museum Board require approval by the SAR Board of Trustees. Items in the SAR Museum collections may be transferred to other collections within the SAR, including the SAR Genealogical Research Library's Archives, Education Outreach Program, the SAR Finance Director, and the manager of the Institutional Collection.

The SAR Executive Director is responsible for maintaining current museum professional standards in museum collections care and assuring compliance with applicable laws and regulations. The Executive Director may delegate to staff members the authority to implement established policies and carry out the direct management and care of the museum collection. Outside contractors shall not have unsupervised access to the museum collection, but must be

accompanied by designated staff when accessing the collection in any way. Exceptions must be approved on a case-by-case basis by the Museum Board.

Ethics

The Sons of the American Revolution Trustees and general officers recognize that they are responsible for the care and protection of objects held in trust for the general public. As such, the SAR has the fiduciary responsibility to see that the museum collections and loaned collections in its custody are lawfully held, protected, preserved, insured, and displayed according to appropriate museum standards. Ethical management of artifacts needs to be a priority of the Museum Board, SAR Trustees, general officers, and staff.

Use and Access

The National Society SAR holds museum artifacts in storage and on exhibit for the benefit of our members, the viewing public, academic researchers, and the Society's outreach educational program. Due to limited space and resources, many items in the collection are maintained out of view in storage. The following guidelines must be followed in order to allow visitors and researchers to view items in our artifact collections:

1. An appointment must be made with the SAR Executive Director or the Director of the SAR Center as approved by the Executive Director.
2. No changes to exhibits or storage locations, methods, or conditions are permissible without the SAR Executive Director's approval.
3. Visitors are not allowed to view artifacts in non-public areas without being accompanied by an SAR Full-Time Staff member with proper credentials and training to handle museum collections. Viewing of artifacts should take place during normal Headquarters operating hours.
4. The public are not granted access to collection records including acquisition documents to maintain security of donor's personal information.

Acquisition

Acquisition is the act of gaining legal title to a collection item or group of items. Accessioning is the formal process used to legally acquire and record a collection item or group of items into the museum's collection.

Authority to acquire objects by donation or bequest for the SAR Museum collections resides with the SAR Museum Board. The authority to acquire objects by acquisition shall be consistent with current policies pertaining to the expenditure of the Museum Special Purpose Funds. Requests and correspondence should be directed to the Museum Board Chairman for action.

Acquisition criteria will include but are not limited to:

1. Relevance.
2. Ability to provide storage, documentation, exhibition, interpretation, protection, and preservation.
3. Item is suited to remain in the collection.
4. When able, provide provenance.
5. Legal ramifications must be considered by the Chancellor General before accepting the item. For example: Copyright, clear title, local, state, or federal law.
6. Copyright for artwork should be transferred if applicable and possible.
7. Restrictive and unrestrictive gifts may be considered.
8. Appraisals will not be provided by staff as a general rule, but they can assist in directing members or members of the public to recognized appraisers' associations to locate an appraiser in their area.
9. In accordance with the U.S. Tax Reform Act of 1984, donated material must remain in the Museum's possession for two years before sale, trade, or repatriation.
10. Collection records are primarily kept in PastPerfect ("the record"), the computer program used as industry standard. Backups may be kept in a staff filing cabinet with at least one back-up maintained off-site in a secured facility.
11. PastPerfect will be backed up each time there is a change in the database.

Acquisition methods:

1. Gifts
 - a. A Deed of Gift must be recorded.
2. Purchases
 - a. Authenticity must be verified. Provenance must be determined at time of purchase.
3. Exchange
 - a. Exchange of historic collections may only be made with other museums or historical societies. A Deed of Gift applies.
4. Temporary Custody
 - a. Temporary Custody shall not be discouraged.
 - b. Temporary Custody is generally a part of the acquisition process rather than a method of acquisition.
5. Commission
 - a. The Museum Board, with approval of the SAR President General, may commission the creation of original works of art for exhibit as part of the Museum collection.
6. Bequest
7. Acquisition forms are in Appendix A.

Accessioning

Accessioning consists of acquiring and registering an object. Objects may be acquired through exchange, donation, or purchase. The final disposition of the artifact is the complete clear transfer of title of ownership from the Donor to the National Society of the Sons of the American Revolution or the fulfillment of the loan obligation as agreed by both parties.

1. Photographic record: All accessioned artifacts will be photographed from multiple angles for the record.
2. Documentation shall consist of, but not be limited to: a condition report, acquisition documents, accession records, catalog records, photographs, condition report, conservation, reports, and inventories.
3. Materials found or entered into the museum's collections will be labeled and assigned a unique accession and catalog number consistent with the following: (1) the accession number will be the organization's identifier, NSAR, followed by the year of the donation, then a period followed by the number of the donation in that year, and (2) an object's catalog number will be the donation's accession number followed by a period and the sequential number of the object in that specific donation. The accession number and the catalog number will be recorded in PastPerfect.

Deaccessioning and Disposal

Deaccessioning is the process used to formally approve and record the removal of a collection item or group of items from the National Society of the Sons of the American Revolution's accessioned museum collections. Disposal is the act of physically removing a collection item or group of items from a collection.

Authority to deaccession material from the SAR Museum collections resides with the SAR Trustees. Recommendations for deaccession should come from the Museum Board. The process must be cautious, deliberate, ethical, and in line with National Society, SAR Bylaws and Museum Board policies.

1. Before any artifact is recommended for deaccession or is deaccessioned, reasonable efforts shall be made to ascertain that the museum is legally free to do so. Where restrictions to the disposition of the material or object are found, the following procedure shall be utilized:
 - a. Mandatory conditions of acquisition will be strictly observed unless deviation from their terms is authorized by the National Society SAR Chancellor General.
 - b. In an event of a question concerning intent or force of restrictions, the National Society SAR Executive Director shall seek the advice of the National Society SAR Chancellor General.
2. Attempts must be made to contact the donor, if alive, or his/her heirs and ask if they would like the item returned.

3. All applicable federal, state, local and international laws, treaties and regulations and any other applicable restrictions will be observed and documented.
4. Requests for deaccession of an item must be in writing to the SAR Museum Board. Such recommendations will specify the source and/or provenance of the artifact, and the recommended means of disposal. SAR Museum Board approval is required for actual deaccession.
5. Deaccessioned items will not be given, sold, loaned or otherwise transferred, publicly or privately, to SAR employees, officers, trustees, or their families without written consent by the SAR Museum Board and the Chancellor General.
6. The means of disposal of deaccessioned items may include exchange, sale (negotiated, private, public auction, sealed bid, or open bid), destruction, or transfer to another repository or SAR department including Outreach Education, Finance, Special Collections, the SAR Genealogical Research Library and Archives, or Historian General.
7. All proceeds resulting from the deaccession of objects from the permanent collections of the Museum shall be deposited to the SAR Museum Special Purpose Fund to be used for collection maintenance or expansion.
8. Deaccession forms are in Appendix B.

Collections Care

Collections care includes preservation and conservation. Preservation is the protection and stabilization of collections through a coordinated set of activities aimed at minimizing physical, chemical and biological deterioration and damage, along with preventing the loss of intellectual, aesthetic, and monetary value. Conservation is an ongoing process with the goal of making collections available for current and future use. Materials, whether in use or in storage, shall be protected from destructive forces such as extreme temperature, humidity, dust, UV light, pests of all types, and otherwise improper handling.

The Sons of the American Revolution shall provide the necessary preservation, protection, and security for all collections held in trust, whether they be accessioned, on loan, or in temporary custody. Any conservation, cleaning, or restoration of collection items must be authorized by the SAR Museum Board, documented, and justified for the purpose of preservation.

The first line of defense is preventative maintenance – environmental controls must reflect that need. Some preservation techniques can be as invasive as the deterioration itself – therefore, all preservation must have some specific justification identified in writing and annotated in Past Perfect.

1. **Storage:** The SAR maintains storage space at the SAR Headquarters. Anyone besides approved staff shall not be in the collections' storage unaccompanied.
2. **Exhibits:** Artifacts on exhibit have the same care and protection as they have when in storage.
3. **Handling:** In order to reduce the serious risk of damage during handling the collections will be handled only by trained staff as identified by the Executive Director. The exceptions are for replica items whose educational purpose and intent are to allow

children, school groups, visitor, and the public to touch and experience them, such as the replica Liberty Bell and the “Intrepid” Cannon in a controlled environment. All exceptions must be approved by the Museum Board as recorded in meeting minutes.

4. Environment:
 - a. The environment in an office building is of special concern.
 - i. Identified concerns include temperature extremes during off hours when the environmental controls are turned off and humidity levels during seasonal extremes.
 - ii. Conditions are consistent within AAM established limits.
 - iii. Pest control, lighting control, air pollutants are all maintained and adjusted within AAM established limits by recommendation and building control.
 - iv. Conservation: Basic cleaning and maintenance may be performed only by trained staff members using professionally accepted non-invasive techniques. Any more invasive techniques must be professionally contracted. Loaned material must be accompanied by a waiver of liability.
 - v. To seek professional conservation, the trained staff must submit a report with a rationale for the conservation needed to the Museum Board for approval.
5. Security: All storage facilities, the gallery, and exhibition spaces are secure and dedicated. Access is controlled by key and limited to SAR staff as authorized by the SAR Executive Director.

Loans:

A loan is a temporary transfer of possession of collection items for an agreed purpose and on the condition that the collection item is returned at a specific time. Loans do not result in a change of ownership and loaned items are not to be accessioned.

The authority for accepting incoming and outgoing loans will reside with the Museum Board. All loaned or borrowed items will be covered by insurance as stipulated by an authorized loan agreement between the parties.

1. Incoming Loans
 - a. Determination of acceptance of loans is based on the same criteria as the determination of acceptance of title transfer. Relevancy, standard of care, legality, and other logically applicable considerations are all identical.
 - b. Upon the death of the lender, previous incoming loans shall be the sole unconditional property of the SAR, unless title passes to an heir or the estate of the deceased lender. A new Loan agreement will need to be completed as soon as possible with the estate or heir(s).
 - c. If ownership of the loaned item changes during the term of the loan, whether by reason of death, sale, insolvency, gift, or otherwise, the new owner may, prior to the object’s return, be required to establish their legal right to receive the material by proof satisfactory to the SAR Chancellor General. In addition, the new owner,

once legal right is determined, may alter the conditions of the loan so long as a new agreement is reached to the mutual satisfaction of the new owner and SAR.

- d. The SAR reserves the right to terminate a loan prior to its expiration with reasonable notice to the owner.
- e. Unclaimed loans require seven years of possession after the close of a loan period to initiate claim of title, as required by Kentucky abandoned property law.

2. Outgoing Loans

- a. Blanket requirements and authorization are the same as for incoming loans.
- b. Institutions requesting to borrow objects from the SAR *must* provide detailed information on the subject and location of the exhibition where the borrowed material(s) will be displayed. A facility report should be provided to assess security, environment, and staff qualifications and abilities.
- c. Loans will generally not be approved for extremely fragile objects, frequently used material, or items already on permanent display.
- d. The outgoing loan agreement will include but is not limited to:
 - i. Care and protection.
 - ii. Agreement to NOT conserve, restore, repair, re-matte, reframe, clean or perform any substantial changes to the material loaned without prior consent from the SAR.
- e. Loan period will not exceed 12 months (1 year) but consideration to longer duration will be given upon request.
- f. The SAR reserves the right to terminate the loan inside of the agreed time, without reason or for breach of contract.
- g. Insurance will not transfer to the recipient for the duration of the loan. The recipient of the loan shall maintain and provide proof of insurance to the appraised value of the loaned object as set forth by the SAR.
- h. Borrower must pay all costs for transit to and from SAR.
- i. Three months prior to termination of loan, SAR will contact borrower to coordinate the return of the materials.

3. Temporary Custody

- a. Blanket requirements and authorization are the same as for acquisitions.
- b. The SAR Museum Board may accept items in temporary custody while the material is under consideration for acquisition. There is no temporary custody provision for a loan.
- c. Through the action of depositing material(s) with SAR, the depositor indicates their intention to donate the material(s) listed on the receipt for temporary custody.
- d. By signing the receipt for temporary custody, the depositor releases SAR from all liabilities with respect to loss or damage of the material(s) covered by the receipt. SAR will not insure the items listed.
- e. If items are left longer than the term of custody, SAR shall make reasonable effort to notify the depositor. If, after seven years from end of term of custody, the depositor makes no response, then legal title transfers to the SAR and “acquisition

and accession” requirements are triggered and will be observed, as required by Kentucky abandoned property law.

- f. Items left in temporary custody with the SAR may be photographed and reproduced without regard to copyright.
- g. Unsolicited objects mailed to the SAR will be treated in accordance with temporary custody guidelines for 6 months until owner can be contacted and other arrangements made. Without contact for seven years, items will revert to SAR ownership and “acquisition and accession” requirements will be triggered and observed, as required by Kentucky abandoned property law.
- h. Temporary custody agreements for the purposes of academic research require the approval of the Museum Board. Correspondence regarding such research should be directed to the Museum Board Chairman.
- i. Temporary custody forms must clearly indicate copyright restrictions.

Insurance:

1. Insurance coverage

- a. Insurance is maintained, administered, and determined by the National Society’s Risk Management and Insurance Committee through the SAR Executive Director or his designated representative (i.e. the Finance Director) who also maintains the records. Specific valuations and worth are provided by approved appraisers and periodically reviewed by SAR to ensure proper limits of insurance coverage are purchased. The current coverage limit for the SAR Collections is \$1.5 million.
- b. The insurance policy also insures against loss to items while on loan to the SAR. The coverage limit for personal property of others in the custody of the SAR is included in the \$2.5 million Personal Property limit. The Personal Property of Others coverages are valued at replacement cost but will pay no more than the amount contractually liable. Payment is also subject to all other provisions of the loss payable provisions of the insurance policy. If there is an appraisal that accompanies the loan agreement, that is unequivocal.

If the loaned item is considered rare and high valued, the owner must provide a copy of the most recent appraisal of the item. Coverage for loaned items includes:

- i. Loaned artifacts on-site at SAR Headquarters
- ii. Loaned artifacts at any other location
- iii. Loaned artifacts in transit on any one conveyance
- iv. Loaned artifacts in any loss or disaster either in case of partial or total loss, salvage charges or expenses, or all combined.

References and Resources

A Legal Primer on Managing Museum Collections, by Marie C. Malaro, Smithsonian Books, 1998

Museum Registration Methods, 5th Edition, edited by Rebecca A. Buck and Jean Allman Gilmore, The AAM Press, 2010

National Standards & Best Practices for U.S. Museums, by the American Association of Museums, The AAM Press, 2008

Appendix A
Acquisition Forms



National Society of the Sons of the American Revolution
 809 W. Main St.
 Louisville, KY 40202

Deed of Gift

Donor: _____

Address: _____

Telephone & Email: _____

I/We own legal title to the objects(s) here described and voluntarily make this gift. All gifts are accepted with the understanding that they become the property of the National Society of the Sons of the American Revolution (NSSAR) Museum Collection and may be used for research, educational programs, exhibited to the public, or otherwise disposed of according to the policies and procedures of the NSSAR. I/We hereby irrevocably and unconditionally give and transfer to the NSSAR all rights, title, and interest of the following, together with all intellectual property; copyright, trademark and any associated rights I/we have. To the best of my/our knowledge, the subject of this gift is free and clear of all encumbrances and restrictions.

Description of Object(s):

Condition of Item: _____ Date: _____

Estimated Value of Object(s): _____ Date: _____

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

Date accepted by the NSSAR Museum Board: _____

I/We wish that the gift be identified to the public and in the NSSAR records as:

In memory of:

To Be Completed by NSSAR Staff:

Received by _____ Date: _____

Signature and title

Catalogued in NSSAR Museum Collection: Object ID: _____ Object Name: _____

Date: _____ Staff Signature & Title: _____



National Society of the Sons of the American Revolution
809 W. Main St.
Louisville, KY 40202

Accession Checklist

Accession Number: _____ Title: _____
Catalog Number: _____ Date Received: _____

Date and Initial when Completed all that are applicable:

- _____ Deed of Gift signed
- _____ Condition Report completed
- _____ Catalog Number attached to object
- _____ Object photographed
- _____ Object registered in PastPerfect
- _____ File created
- _____ Thank You letter sent
- _____ Object placed (Location: _____)
- _____ Object placed in proper archival storage container/enclosure

Appendix B
Deaccession Forms



CERTIFICATE OF TRANSFER OF TITLE

The National Society of the Sons of the American Revolution
809 West Main Street
Louisville, KY 40202-2619

PastPerfect Category :	
Object Name:	
Object ID:	

In accordance with the established policies of the NSSAR Museum Board and under their directives, the object(s) described below, which are accession of the NSSAR museum, are hereby given, granted, and conveyed to the following:

Organization and/or Individual:			
Address:			
City:	State:	Zip Code:	
Telephone:	Email:		

Description of Object(s) Transferred:

Method used to Transfer Object:	Date:
Party responsible for shipment costs:	Initials: Date:
Scheduled time & individual responsible for picking up item:	Initials: Date:

Date transferred from the NSSAR Museum:

Deaccession Sub-Committee Chairman: Date:

Museum Board Chairman: Date:

Accepting Representative: Date:

Executive Director: Date:

Chancellor General: Date:

Form # MBCTT-2014-ver. 1



DEACCESSION RECOMMENDATION FORM

The National Society of the Sons of the American Revolution
 809 West Main Street
 Louisville, KY 40202-2619

Date Submitted:		Submitted by:			
Past/Perfect Category:		Object Name:		Object ID#:	
Donor Name:					
Donor Address:					
City:			State:		Zip Code:
Donor Telephone:			Donor Email:		
Object Name & Description					
Current Condition					
Excellent		Good		Fair	
Poor					
Comments					
Documentation					
Yes		No		If no, state reason:	
Attachments					
Donor Form		Photograph		Catalog Record	
Appraisal		Date of Appraisal:		Insurance	
Other:					
Deaccession Criteria					
Item must meet at least one of the following to be considered for deaccessioning:					
1. The artifact(s) and/or library material(s) is outside the scope of the NSSAR Established Acquisition Guidelines and/or NSSAR Mission Statement.				Yes	
				No	
2. The artifact(s) and/or library material(s) is a duplicate of those already held within the collection.				Yes	
				No	



DEACCESSION CHECKLIST

The National Society of the Sons of the American Revolution
 809 West Main Street
 Louisville, KY 40202-2619

PastPerfect Category :	
Object Name:	
Object ID:	

Initial and date as completed (only those applicable):

Check when completed	Description	Initials	Date
	1. Deaccession Form filled out.		
	2. Certificate of Transfer of Title filled out.		
	3. Records updated, accession record and object record.		
	4. Donor file noted with "Deaccessioned."		
	5. Accession Forms noted with "Deaccessioned."		
	6. Deaccession form filed with Deed of Gift.		
	7. Number removed from object.		
	8. Deed of Gift noted with "Deaccessioned."		
	9. Certificate of Transfer of Title filed with Deed of Gift.		
	10. Deaccession Checklist filed in donor file.		
	11. Letter documenting action taken sent to legally recognized donor and/or family.		

Form # MBDC-2014-ver. 1