

Summary of Changes: Museum Collections Management Policy (2020 vs. 2025 proposed)

1. New Vision, Mission, and Collecting Scope

The 2025 version includes new, more professional statements that strengthen the Museum's focus. The mission is now "*to preserve and interpret the complete, diverse history and cultures of El Dorado County*," replacing the previous, more limited mission statement. The collecting scope has shifted from a general emphasis on collecting to specific criteria, and improved standards.

Impact: The update provides a clear, professional mandate for the Museum. It broadens the collection to include all of the county's history, not just the Gold Rush, reducing potential criticism and making the Museum a more inclusive and relevant community resource. It also gives the Commission a clear, objective framework for accepting or declining donations.

2. Reorganization of the Policy Document

The 2025 version has been completely reorganized into a formal, more professional policy document. It clearly separates high-level policy from detailed procedures.

Impact: This structure enhances operational clarity and efficiency. The Board of Supervisors is being asked to approve a concise policy document, while the detailed daily operational procedures are handled by the Museum Administrator, in line with modern governance best practices.

3. Refined Acquisition and Deaccessioning Policies

The acquisition policy is now more explicit about the criteria for accepting new items, requiring clear provenance and a direct link to the county's history. The deaccessioning policy has also been clarified, outlining a tiered system for disposing of items that are no longer suitable for the collection.

Impact: These changes establish a legally and ethically robust framework for managing the Museum's collection. They minimize the risk of accepting items of dubious origin or unknown relevance and ensure that all decisions regarding the collection are transparent and defensible. The new deaccessioning policy also provides a clear path for refining and improving the quality of the collection.

4. Updated Legal Forms

The forms included in the policy, such as the [Deed of Gift](#) and the [Temporary Custody Receipt](#), have been revised for greater legal clarity and consistency. They now explicitly address liability, insurance responsibilities, and the legal transfer of title.

Impact: These updates protect the County and the Museum from legal and financial risks by ensuring all donations and temporary custody arrangements are governed by clear, legally sound terms that are easily understood by donors.



COLLECTIONS MANAGEMENT POLICY

EL DORADO COUNTY HISTORICAL MUSEUM

Third Revision adopted by the Historical Museum Commission,
[DATE]

Originally adopted by the Historical Museum Commission, October
1999

El Dorado County Historical Museum
104 Placerville Drive
Placerville, CA 95667

museum@edcgov.us
<http://museum.edcgov.us>
(530) 621-5865

1. AUTHORITY AND PURPOSE

The El Dorado County Historical Museum Commission, appointed by the Board of Supervisors under Ordinance No. 4551, provides oversight for the Museum. This Collections Management Policy is a core document that establishes the ethical and professional standards for the management of the Museum's collections. Its purpose is to guide staff and commissioners in their stewardship of historical items, ensuring their proper care, preservation, and accessibility for current and future generations.

This policy is adopted by the Historical Museum Commission and submitted for approval by the El Dorado County Board of Supervisors. It shall be implemented by the Museum Administrator and reviewed and updated at a minimum of every five years, consistent with museum profession best practices.

The Museum Administrator is responsible for implementing this policy, supervising staff and volunteers in collections-related tasks, and keeping the Historical Museum Commission informed of all collections activities.

2. MUSEUM VISION, MISSION, AND COLLECTING SCOPE

Vision Statement: The El Dorado County Historical Museum will be a nationally-recognized leader in preserving and interpreting the complete, diverse history and cultures of El Dorado County.

Mission Statement: The El Dorado County Historical Museum collects, protects, and presents the diverse stories and comprehensive history of El Dorado County, connecting its narrative to California and the nation. We serve as a widely accessible and collaborative community

cornerstone, fostering appreciation and providing enriching educational and research opportunities through dynamic engagement in person, online, and through archival and public programming.

Collecting Scope: The Museum's collection efforts are focused on acquiring, maintaining, and preserving tangible and intangible heritage that is significant to the history, people, and culture of El Dorado County.

The Commission will prioritize items that meet one or more of the following criteria:

- **Association with Significant Events:** The item is directly linked to a significant event that contributed to the broad patterns of county or state history.
- **Association with Significant Persons:** The item is closely associated with the lives or activities of persons important to El Dorado County's history.
- **Artistry, Design or Fabrication:** The item embodies a distinctive type, period, or method of fabrication or artistry; represents the work of a master craftsman; or possesses high artistic value.
- **Information Potential:** The item is likely to yield important information about local history or prehistory.

Additional Considerations:

- **Provenance and Relevancy:** The item's history must be well-documented and directly tied to El Dorado County, its events, or its peoples. Items without verifiable provenance will generally not be accepted, unless they have exceptional importance or fill a critical gap in the collection.
- **Integrity:** The item must retain its historical character, appearance, and materials to convey why it is significant.
- **Age:** While the Museum gives priority to items dating from before **1920**, any item may be considered. Recent items are typically accepted only if they have extraordinary importance to the county's history.

Items outside of this defined scope will not be acquired.

3. COLLECTIONS CATEGORIES AND DEFINITIONS

The Museum's holdings are formally divided into two principal categories, each with distinct purposes and management standards.

- **Permanent Collection:** These are objects and archival materials, including photographs and documents, that are formally accessioned into the Museum's collection. They are legally owned by the County of El Dorado and are held in public trust for long-term preservation and research. The Museum makes a perpetual commitment to care for these items and ensures they have clear title and provenance.

- **Property Collection:** These are items in the Museum's custody that are not formally accessioned. They are acquired for specific, functional purposes and do not have the same long-term care requirements as the Permanent Collection. This includes items used for educational programs, exhibit props, maintenance equipment, or items accepted for fundraising purposes.

4. COLLECTIONS MANAGEMENT PRINCIPLES

Acquisition: All acquisitions into the Permanent Collection must be approved by a majority of the Historical Museum Commission and must have a Deed of Gift form signed by the owner. Acquisitions must align with the Museum's mission and collecting scope, and the Museum must have the capacity to properly care for the item. The Museum will not provide monetary appraisals for potential donations.

Deaccessioning and Disposition: Deaccessioning is the process of permanently removing an item from the Museum's Permanent Collection. This is done only when an item no longer serves the Museum's mission, has been found to be unsuitable for the collection, or its long-term care cannot be sustained. Deaccessioning must be approved by the Museum Commission and will be documented in a transparent manner.

The disposition of deaccessioned items shall follow a hierarchy of methods, with priority given to retaining the item in the public trust. These methods include, in order of preference:

1. Transfer or exchange with another government, museum, or non-profit entity.
2. Use in another government-owned museum or non-profit's educational programs.
3. Public sale or auction in accordance with County surplus ordinances, with proceeds restricted for the care or acquisition of other permanent collections.
4. Scrapping or disposal if the item is in poor condition or has no historical or monetary value.

Collections Care: The Museum is committed to providing the highest possible standard of care for its collections, with priority given to items in the Permanent Collection. This includes maintaining a stable environment, controlling light and temperature, ensuring security, and establishing protocols for handling and storage. Conservation work on collections will only be carried out by qualified professionals.

5. ACCESS TO AND USE OF COLLECTIONS

The Museum is a public institution and strives to make its collections available for research, education, and exhibition. Public access will be provided during established operating hours and through special arrangements for research requests. All access to collections not on public display must be supervised by a staff member or trained volunteer. The Museum reserves the right to deny access to protect the integrity of the collections.

6. FUNDING AND LEGAL CONSIDERATIONS

Funding: The Museum's collections are public assets held in trust and should not be capitalized or considered financial assets. Any proceeds derived from the sale of deaccessioned objects are restricted for the care and conservation of the Museum's collections or for the acquisition of new permanent collections.

Insurance: As a County entity, the Museum's collections are covered by the County of El Dorado's self-insurance policy. The Museum will not accept responsibility for insuring items on loan from other parties; it is the lender's responsibility to secure additional insurance.

Required Documentation: The Museum maintains a system of records for all collections, including a Deed of Gift, Accession Form, and detailed documentation on provenance and condition for every item in the Permanent Collection.

APPENDIX A: RELATED DOCUMENTS

- El Dorado County Historical Museum Emergency Response Plan
- El Dorado County Historical Museum Ethics Policy
- El Dorado County Historical Museum Collections Management Procedures Manual (internal document)
- El Dorado County Ordinance No. 4551 and Bylaws



DEED OF GIFT to the El Dorado County Historical Museum

Donor:
(Please print or type)

Address:

Phone:

Email:

Accession number: _____

I hereby give, assign and transfer to the County of El Dorado for the County Historical Museum all my right, title, and interest in and to the following described property:

Description of Property:

Dated: _____ **Donor Signature:** _____

I hereby consent to the above-described gift(s):

Dated: _____ **Spouse Signature:** _____

All gifts are subject to the rules regarding gifts described on the reverse.

Terms and Conditions for Donations to the El Dorado County Historical Museum

This document outlines the standard terms for gifts to the Museum. Please review these rules before completing the Deed of Gift.

1. Right of Use and Retention

By donating an item, you grant the El Dorado County Historical Museum **absolute discretion** over its use, care, and management. This includes the right to determine if and when an object is exhibited, the duration of its display, and its storage location. Consistent with the Museum's Collections Management Policy, the Museum may also deaccession and dispose of the item if it is no longer relevant to the collection or cannot be properly cared for.

2. Legal Title and Provenance

The donor warrants that they have clear and unencumbered legal title to the donated item and that its transfer to the Museum does not violate any local, state, or federal laws. This includes ensuring compliance with any government customs or import regulations for items from outside the United States. The Museum is not responsible for any non-compliance with applicable laws.

3. Appraisals and Valuation

The Museum's staff cannot and will not provide monetary appraisals for any donated items. You must obtain an independent appraisal from a qualified professional if you wish to determine the value of your donation for tax purposes. The Museum accepts no responsibility for the adequacy or correctness of any valuations provided by the donor or a third party.

4. Tax Deductibility

As the Museum is a division of a government entity, El Dorado County, your donation may be deductible for income tax purposes. However, it is the sole responsibility of the donor to determine the value of the contribution and to complete any necessary IRS forms, such as Form 8283. Please consult with your personal tax advisor or attorney for guidance.

ACCEPTANCE

I hereby accept the above-described gift(s).

Dated: _____ **Name & Title:** _____

Donee: County of El Dorado for the County Historical Museum

Museum Accessioning Procedure

This procedure outlines the necessary steps to formally accept and process an artifact into the Museum's permanent collection, following the approval of the Museum Commission.

Phase 1: Initial Processing & Documentation

1. **Gather Materials:** Collect the physical item, the Temporary Custody Receipt, and any supporting documentation, such as provenance records, photographs, or related information provided by the donor.
2. **Confirm Approval:** Verify that the item has been approved for accession by the Museum Commission, as recorded in the official meeting minutes.
3. **Assign Accession Number:** Assign the next sequential accession number, as recorded in the **Accession Log**. The standard format for this number is: **YEAR-BATCH-ITEM** (e.g., 2024-01-01).
4. **Complete the Accession Record:**
 - Fill out the **Inventory/Cataloging Form** completely, using the accession number as the primary identifier.
 - Research and document key information about the item, including its common name, function, date, and any known history. Refer to **Nomenclature 3.0** for standardized object terminology.

Phase 2: Object Marking and Cataloging

1. **Mark the Item:** Physically mark the item with its unique accession number using an approved method that is non-damaging and reversible.
 - Use a clear barrier coat (e.g., clear nail polish or white-out) to create a small, flat surface for writing.
 - Write the accession number clearly and concisely on the barrier coat using a fine-tipped pen or archival ink.
 - Apply a final clear topcoat over the number to seal and protect it.
 - Marking Location: Place the number in a discreet but easily found location, such as the bottom-right corner or a reverse surface.
2. **Photograph the Item:** Take high-resolution photographs of the item. All images must be clear and show the object from multiple angles.
3. **Digitize the Record:**
 - Enter all information from the Inventory/Cataloging Form into the digital catalog or database.
 - Upload and associate the photographs with the digital record. Rename the image files using the accession number for consistency (e.g., 2024-01-01.jpg).

Phase 3: Administrative Finalization & Filing

1. **Prepare Donor Correspondence:** Draft the **Deed of Gift** and a formal **Acknowledgment Letter** to the donor.

2. **Send Documentation:** Send the signed Deed of Gift and acknowledgment letter to the donor. Email is the preferred method, with a physical copy sent via USPS only upon specific request.
3. **Final Filing:**
 - Create a dedicated **Donor Folder** and file it in the Donor Filing Cabinet.
 - Place all physical documentation (original forms, correspondence) in the Donor Folder.
 - If the item is intended for a specific exhibit, create a dedicated file for the exhibit and file relevant information there.
 - Create and print an exhibit label, if required.
4. **Secure Storage:** Place the physical item in its designated storage location. This location should be noted on the Inventory/Cataloging Form and in the digital catalog.



AGREEMENT FOR INCOMING LOAN

EL DORADO COUNTY HISTORICAL MUSEUM

104 Placerville Drive
Placerville CA 95667
Telephone: (530) 621-5865
E-mail: museum@edcgov.us

Date:

Lender's Name or Organization:

Phone:

E-Mail Address:

Mailing Address:

In accordance with the conditions set forth below, the objects listed below are borrowed for the following purposes:

for the period of _____ to _____, subject to Paragraph H below
entitled Option Term.

OBJECT	DESCRIPTION (INCLUDE SIZE, WEIGHT, MATERIALS, CONDITION AND ATTACH A RECENT PHOTOGRAPH)	INSURANCE VALUE (PLEASE ITEMIZE AND INITIAL BY BOTH PARTIES.)

If additional space is necessary, please attach an extra sheet.

PACKING and SHIPPING

The following packing and shipping arrangements are proposed subject to review and approval by the Museum Administrator in consultation with the Lender:

Object(s) to be packed by (check one):

- ☐ Lender
- ☐ El Dorado County Historical Museum
- ☐ Other (specify) _____.

SPECIAL REQUIREMENTS AND CONDITIONS

Specify handling, installation, etc. (Attach continuation sheet if necessary):

CONDITIONS GOVERNING LOANS

A. Care, Preservation & Exhibition:

- a. The Museum will give to object owned by Lender the same care as it does comparable property of its own. Precautions will be taken to protect the object from fire, theft, mishandling, rurt and insects, and extremes of light, temperature and humidity while in the Museum's custody. It is understood by the Lender and the Museum that all tangible objects are subject to gradual inherent deterioration for which neither party is responsible.
- b. Evidence of damage at the time of receipt or while in the Museum's custody will be reported immediately to the Lender. It is understood that objects, which in the opinion of the Museum show evidence of infestation, may be fumigated at the discretion of the Museum.
- c. The Lender will be requested to provide written authorization for any alteration, restoration or repair. The Museum may examine objects by all modern scientific methods.
- d. The Museum retains the right to determine when, if and for how long the object borrowed will be exhibited.

B. Transportation and Packing

- a. The Lender certifies that the objects lent are in such condition as to withstand ordinary strains of packing and transportation and handling. A written report of condition of objects prior to shipment must be sent by the Lender to the Museum. Otherwise, it will be assumed that objects are received in the same condition as when leaving the Lender's possession. Condition recorded, which will include photographs, will be made at the Museum on arrival and departure.

- b. Costs of transportation and packing will be borne by the Lender, who will abide by the industry standard in the packaging selection of the mode of transportation of the object. The method of shipment must be agreed upon by both parties, and objects will be returned packed in the same or similar materials as received unless otherwise authorized by the Lender.
- c. The Lender will assure that said objects are adequately and securely packed for the type of shipment agreed upon, including any special instructions for unpacking and repacking.

C. Insurance

- a. Objects will be insured for the amount specified herein as agreed to by the parties, which must reflect the object's fair market value.
- b. Prior to shipping to the Museum, Lender must supply Museum with a certificate of insurance naming the Museum as an additional insured or waiving rights of subrogation. If the Lender fails to provide said certificate, this failure shall constitute a waiver of insurance by the Lender (see No. 4 below). The Museum shall not be responsible for any error or deficiency in information furnished by the Lender to the Lender's insurer or for any lapses in such coverage.
- c. In case of long-term loans, it is the responsibility of the Lender to notify the Museum of updated insurance valuations.
- d. If insurance is waived by the Lender, this waiver shall constitute the agreement of the Lender to release and hold harmless the Museum from any liability for damages to or loss of the loan property.
- e. The amount payable by insurance secured in accordance with this loan agreement is the sole recovery available to the Lender from the Museum in the event of loss or damage. Any recovery for loss of value by breakage shall be calculated as a percentage of the insured value specified by the Lender in the agreement.
- f. It is the responsibility of the Museum to notify El Dorado County Risk Management immediately upon the receipt of any item valued at more than \$50,000 so said item can be added to County's property schedule.

D. Reproduction and Credit

Unless otherwise notified in writing by the Lender, the Museum may photograph or reproduce the objects lent for educational, catalog and publicity purposes. It is understood that objects on exhibit may be photographed by the general public. Unless otherwise instructed in writing, the Museum will give credit to the Lender as specified on the face of this agreement in any publications. Whether individual labels are provided for objects on display is at the discretion of the Museum.

E. Change in Ownership and/or Address

It is the responsibility of the Lender or his agent to notify the Museum promptly in writing if there is any change in ownership of the objects (whether through inter vivos transfer or death) or if there is a change in the identity or address of the Lender. The Museum

assumes no responsibility to search for a Lender (or owner) who cannot be reached at the address of record.

F. Abandoned Loans

A loan terminates on the date specified on the face of this agreement. Upon termination of a loan, the Lender is on notice that a return of the object or renewal of this agreement must be effected. Failure by Lender to acknowledge that the loan has terminated will cause the Museum, by U.S. Postal Service return receipt requested, to notify Lender of the termination and request disposition of the object. Failure by Lender to respond to Museum's notice within 30 days following the mailing of the notice, then the objects will be maintained at the Lender's risk and expense for a maximum of one year. If after one year the objects have not been claimed they will be considered abandoned then and in consideration for maintenance and safeguarding, the Lender shall be deemed to have made the objects an unrestricted gift to the Museum.

G. Return of Loans Upon Termination of this Agreement

- a. It shall be agreed between Lender and Museum upon execution of this agreement who shall be responsible for the packaging, transportation and return of the object and the cost incurred thereon:
 - i. ☐ By Lender: Lender shall notify Museum at least 30 days in advance of its intended date of removal of the object and agrees to accomplish the removal only during Museum business hours. Lender further agrees to be responsible for any loss or damage to the object occasioned by the packaging, transportation and return of the object.
 - ii. ☐ By Museum: Museum shall notify lender of the date in which the object shall be shipped from the Museum and its intended arrival date at Lenders, address being:
 1. Method of transportation shall be mutually agreed upon by Lender and Museum. Museum's liability for loss or damage to the object, if any, terminates at the moment the object is no longer at the Museum.
 - iii. Terms other than above:

H. Option Term

- a. Subject to the mutual agreement of the parties, this incoming loan agreement may be renewed for
- b. successive 12 month terms. Museum shall notify lender, and lender shall notify Museum pursuant to Paragraph J below, whether or not it desires to extend the stated term of this agreement no later than 90 days prior to the stated expiration date. The notice shall specify proposed adjustments to the terms and conditions

of this agreement or shall specify that the proposed renewal is on the same terms and conditions.

I. Lender's Warranties:

- a. If a business entity: Lender represents and warrants that Lender is organized and existing under the laws of the State of California and that the person executing this agreement for Lender has all requisite power and authority to act for the business entity. Further, Lender warrants that the object(s) of this loan is (are) the sole personal property of Lender as a business entity.
- b. If not a business entity: Lender represents and warrants that if Lender is not a business entity, Lender warrants that the object of the loan is (are) its sole personal property.

J. Indemnity

Lender will defend and indemnify the Museum against and hold the Museum harmless from all claims, actions, proceedings, costs, damages and liabilities, including attorneys' fees arising out of and connected with or resulting from the loan of certain objects to the Museum when, including without limitations, the use, operation, possession or delivery of the object has caused the Museum to be subject to claims, actions, proceedings, costs, damages and liabilities, including attorneys' fees as a direct result of the Lender's intentional or negligent act.

K. Notices

- a. All notices and other communications required or permitted under this agreement shall be validly given, made or served if in writing and delivered personally or sent by registered mail to the parties at the addresses set forth below,
- b. **To Museum:** Museum Administrator, El Dorado County Historical Museum, 104 Placerville Dr., Placerville, CA 95667.
- c. **To Lender:**

(address) or any other address as either party may from time to time designate by giving written notice pursuant to this section.

L. Applicable Law

This agreement shall be governed by and construed under the laws of the State of California, and jurisdiction and venue for any dispute arising from or relating to this agreement shall be in the County of El Dorado,

M. Attorneys' Fees

If either party files any action or brings any proceeding against the other arising out of this agreement, the successful or prevailing party or parties shall be entitled to recover reasonable attorneys' fees and other costs incurred in that action or proceeding in addition to any other relief to which it or they might be entitled.

N. Entire Agreement Modification and Waiver

This agreement represents the entire understanding and agreement between the parties regarding the subject matter of this agreement and supersedes and replaces all prior agreements and understandings, whether oral or written. The provisions of this agreement cannot be amended, supplemented or changed, nor can any of its provisions be waived except by in writing signed by the party against whom enforcement is sought. No waiver or breach of this agreement shall be deemed to constitute a waiver of a further breach, whether similar or dissimilar.

O. Termination

The Museum retains the right to cancel this loan upon a sixty-day notice to the Lender, and upon expiration or earlier termination of this agreement, the Museum shall notify the Lender that the artifact shall be removed by Lender from the Museum within 30 days of said notice, failure by Lender to respond to Museum's notice shall cause the terms of Paragraph F to become controlling.

P. Authority to Execute on Behalf of Museum

Should the insurance value of the object be in excess of \$1,000 this agreement must be executed by the Director of El Dorado County Library Department as the County Contract Administrator. Should the insurance value of the object be less than \$ 1,000, as the El Dorado County Historical Museum Administrator would be designated as the County Contract Administrator and authorized to execute on behalf of the Museum.

IN WITNESS WHEREOF, the parties hereto execute this agreement as of the date and year set forth below.

Signed (Lender):

Date:

Signed (County Contract Administrator):

Date:

Title:



TEMPORARY CUSTODY RECEIPT

EL DORADO COUNTY HISTORICAL MUSEUM

104 Placerville Drive
Placerville CA 95667
Telephone: (530) 621-5865
E-mail: museum@edcgov.us

Date:

Depositor's Name or Organization:

Phone:

E-Mail Address:

Mailing Address:

For the following purpose* (check one):

☐ Consideration for donation

The object(s) listed below are received subject to the CONDITIONS printed on the reverse.

OBJECT	DESCRIPTION (INCLUDE SIZE, WEIGHT, MATERIALS, CONDITION AND ATTACH A RECENT PHOTOGRAPH)	INSURANCE VALUE (PLEASE ITEMIZE AND INITIAL BY BOTH PARTIES.)

If additional space is necessary, please attach an extra sheet.

Removal date is: _____. If the object(s) is/are not removed by this date,
then the CONDITIONS below will control.

Conditions for Temporary Custody

By placing an item with the Museum, the depositor agrees to the following conditions:

1. Liability and Responsibility

- The Museum accepts items on a temporary basis solely for the purposes stated on this form. The Museum will exercise reasonable care to protect the items while in its custody and will not be liable for any damage or loss except in cases of gross negligence.
- The depositor is responsible for maintaining their own insurance on the item for its full market value. The Museum does not insure items held under temporary custody.

2. Item Information and Authenticity

- Any information, including attributions and dates, provided by the depositor is recorded for reference only and is not endorsed or guaranteed by the Museum. The Museum does not provide appraisals.
- The depositor warrants that they are the legal owner of the item or have the full legal authority to act on the owner's behalf.
- The depositor warrants that the item has not been acquired by illegal means and that its possession and transfer to the Museum do not violate any local, state, or federal laws, including environmental or importation regulations.

3. Use of Item by Museum

- The Museum may examine, photograph, and conduct scientific analysis of the item for its own purposes. The Museum will not restore, treat, or alter the item without the depositor's explicit written permission.
- The Museum may use photographs of the item for internal records, research, or public outreach and education.

4. Return and Abandonment

- Items must be retrieved by the removal date noted on this form. The Museum must be notified in writing of any changes to the depositor's contact information.
- The Museum will release the item only to the original depositor or to a person who presents a notarized letter from the depositor granting them legal authority to claim the item.
- If an item is not claimed by the removal date, the Museum will send a final written notice to the address on record. If the item remains unclaimed six months after the removal date, it will be considered an unrestricted gift to the Museum, and the Museum may accession or dispose of it as deemed appropriate.

5. Governing Law

- This agreement shall be governed and construed in accordance with the laws of the State of California.

IN WITNESS WHEREOF, the parties hereto execute this agreement as of the date and year set forth below.

Signed (Lender):

Date:

Signed (County Contract Administrator):

Date:

Title:

CODE OF ETHICS

EL DORADO COUNTY HISTORICAL MUSEUM

Purpose

This Code of Ethics is a set of principles that guide the decisions of employees, volunteers, appointed commissioners, and associated non-profit board of directors who manage or work with County Museum collections and programs, provide guidance and advice, or perform any other associated Museum functions.

Professional Conduct for Museum Staff, Volunteers, and Commissioners

1. Museum staff, volunteers and commissioners should always act in the best interests of the County Museum and its mission
2. Seek the expertise and advice of colleagues when such input will benefit the museum collections and programs
3. Share information with colleagues and co-workers in order to benefit the museum profession at large, and credit sources for information received.
4. Foster a cooperative relationship between historical and professional associations in the interest of the museum collection.
5. Maintain current knowledge relevant to museum professional standards and best practices.
6. Avoid conflict of interest or the perception of conflict of interest in pursuing professional activities outside of the Museum, and in personal and business relationships.
7. Avoid revealing or profiting from information gained through work with the Museum
8. Clearly distinguish any personal activities, such as buying or selling for personal profit, from professional activities while employed or volunteering with the Museum
9. If there is personal collecting in the same subject areas as the Museum, do not compete with the Museum for potential donors and acquisitions; clearly identify personal collections on loan to the Museum
10. The Museum should be given first "refusal" in the event of a donation offer; any follow up for personal gain should not be done on Museum property
11. Staff, commissioners and volunteers should not accept gifts (money or objects) associated with their position in the Museum; if a stipend or tip is offered as the result of activities associated with the Museum, it should be donated to the Museum

Acquisition, Disposal, and Documentation

1. Acquire and dispose of collections consistent with the Museum's mission and Scope of Collections statement.
2. Acquire items only if the Museum can manage them according to the Museum's Collections Management Policy
3. Acquire items with legal and ethical provenance. Do not acquire, borrow or retain any object that may have been attained contrary to the laws of its country and the treaties of

the United States; if provenance is unknown, carefully consider the circumstances and available information on how the object was acquired or its history in the Museum's collections

- 4.
5. Only acquire local Native American cultural artifacts for preservation purposes. Many local objects were acquired years earlier by the donors in a manner that is now considered looting, or the donor does not know how it was acquired. These objects can be transferred to an appropriate Native American repository when requested and in compliance with the Native American Graves Protection and Repatriation Act (NAGPRA)
6. Never acquire human remains.
7. Acquire archival material and artifacts from county departments as transfers and make the material accessible upon request in a timely manner
8. Accept only unconditional gifts, unless the Museum Commission recommends an exception on a case-by-case basis.
9. Any staff, commissioners, and volunteers who influence decisions on acquisition and disposal, should avoid a conflict of interest or even the perception of a conflict of interest, by avoiding personal collecting in the same subject as the Museum.
10. No Museum employee, volunteer or commissioner should provide appraisal information on monetary value at any time, whether the object is being offered to the Museum or not. Provide information on obtaining appraisals but do not recommend any single appraiser.
11. Follow the Museum's Deaccession Policy by getting authorization from the County Board of Supervisors based upon the Museum Commission's recommendation, and then first offering surplus objects to other museums and historical nonprofit organizations. All remaining deaccessioned items should be sold in a publicly held and advertised sale, according to the County Board of Supervisor's Surplus Policy.
12. Funds received from the sale of collection items must be used to acquire, restore, and protect Museum collections
13. Museum staff and their relatives should never acquire anything that has formerly been part of the Museum collection. Volunteers should openly declare their interest when purchasing items that have been surplus, in order to avoid the perception of the a conflict of interest.

Preservation and Protection

1. Preserve and protect collections while also providing public access
2. Maintain a current Emergency Preparedness Plan identifying actions to protect collections and human health and safety
3. Keep information about the security of the Museum and the appraised value of objects confidential, except to assist law enforcement authorities
4. If conservation treatment is deemed necessary, it should be consistent with the American Institute for Conservation of Historic and Artistic Works (AIC) Code of Ethics

5. Store, handle, use, and exhibit objects and archival material to maximize their long-term preservation, unless specifically determined to do otherwise, and the decision is documented.

Access and Exhibits

1. Actively promote appropriate access to collections and data about the collections in order to increase public benefit
2. Maintain the confidentiality of data about the nature and specific location of resources which are endangered, threatened, rare, or commercially valuable
- 3.
4. Do not share the specific locations of Native American prehistoric domiciles, archaeological and funerary sites, or other cultural resources, unless there is a documented right to know.
5. Ensure that merchandise sold supports the mission of the Museum and its programs, and are not objects from the collection or specimens of a historical or archaeological nature
6. Never use objects from the Museum or Museum programs for personal purposes.
7. Consult with affiliated groups for the proper care and display of cultural objects, such as of Native American heritage or Chinese heritage.
8. Always exhibit objects in a respectful and factual manner, with accurate, well-researched information, and maintain accurate documentation about the collections in files and databases.
9. Carefully consider donors' request for special labeling or special placement, taking into account the exhibit's overall impression and emphasis.

Management

1. Ensure that all decisions involving donations to the Museum maintain integrity, impartiality, and public confidence. Avoid soliciting donations. Avoid accepting donations of money, collections, or services from sources that would contribute to creating a conflict of interest or the perception of a conflict of interest, including sources who are seeking contracts with the County, sources that would identify the Museum with alcohol or tobacco products, or parties that offer donations in order to state or imply the Museum's endorsement of an object, product, or service.
2. Maintain donation boxes at the Museum or associated with Museum programs only if 100% of the donations go to support the Museum and its programs
3. Avoid naming features or facilities for a donor
4. Treat all individuals in a respectful, courteous and professional manner

Human Resources

1. Do not require employees and volunteers to act in conflict with this code of ethics, or other relevant professional codes of ethics.

2. Ensure that employees, volunteers, and commissioners working with museum collections are informed of hazards inherent to the collections and are provided with protective measures.
3. Ensure that all employees and volunteers with direct responsibility for museum collections management have the knowledge, skill, and ability to perform assigned jobs.

Museum and the El Dorado County Code of Ethics

As the County Museum is a division of the County of El Dorado Administration with county-employed staff managing county volunteers, the Museum Code of Ethics will not conflict with the El Dorado County Code of Ethics.

Approval Authority, Review and Update

This Code of Ethics is approved by the Historical Museum Commission on _____ (date of meeting) and recommends that it be adopted by the El Dorado County Historical Museum, the County Library Department, and the County of El Dorado Board of Supervisors. This Code of Ethics should be reviewed and updated by staff and the Commission on a regular basis with the recommendation of every five years.

Signed (Chairman of the Historical Museum Commission):

Date:

Signed (County Library Administrator):

Date:

Signed (County, Contract Administrator):

Date:

ACQUISITION POLICY

This policy outlines the criteria for the acquisition of new items into the El Dorado County Historical Museum's permanent collection. It is intended to ensure all acquisitions align with the Museum's mission and are managed in a professional and sustainable manner.

1. Acquisition Principles

The Museum's collections are held in the public trust. Therefore, every acquisition must be a deliberate act that demonstrates a long-term commitment to preserving and interpreting the item. All acquisitions must be approved by a majority of the Museum Commission, with the decision recorded in the official minutes. The following principles must be considered for every proposed acquisition:

- **Mission Alignment:** The item must directly align with the Museum's mission and collecting scope.
- **Relevance:** The item must meet at least one of the criteria for historical significance outlined in the Collections Management Policy.
- **Donor's Rights:** The donor must have full, clear, and legal title to the item, with a signed Deed of Gift documenting the unconditional transfer of ownership.
- **No Restrictions:** The Museum will not accept acquisitions that have unreasonable conditions or restrictions that would impede its ability to properly care for or display the item in the future.
- **Legal & Ethical Integrity:** The item must have been acquired by the donor in an ethical and legal manner, with clear provenance.

2. Practical Considerations

In addition to the core principles, the following practical questions should be addressed before acquiring an item:

- **Condition:** Is the item in a stable condition? Can it be properly cared for with the resources available to the Museum?
- **Space:** Does the Museum have adequate and appropriate space to store or exhibit the item under proper environmental and security controls?
- **Uniqueness & Duplication:** Does the Museum already hold a similar item? If so, is this new item a better example, or does it add significant interpretive value to the existing collection?
- **Funding (for purchases):** If the item is to be purchased, is the necessary funding secured and approved in advance?
- **Documentation:** Is there sufficient documentation or can it be reasonably obtained to give the item historical context and meaning?

3. Relationship with Donors

The Museum's primary responsibility is to its mission and to the historical collection it holds in trust, not to the satisfaction of potential donors. It is inevitable that some donations will be declined. When a donation is declined, staff should explain the Museum's collecting goals and, when possible, suggest alternative repositories that may be a better fit for the item.

DISPOSITION POLICY

This policy outlines the principles and procedures for deaccessioning and disposing of items from the El Dorado County Historical Museum's collections. The process is intended to refine the quality and relevance of the collection, ensuring that the Museum fulfills its long-term stewardship obligations in a professional and ethical manner.

1. Deaccessioning Principles

Deaccessioning is the formal process of permanently removing an item from the Museum's permanent collection. The decision to deaccession is a serious and deliberate act that must align with the Museum's mission and be approved by the Historical Museum Commission with the concurrence of the Museum Administrator. Any decision to deaccession will be recorded in the official Commission minutes.

The Museum may consider deaccessioning an item for the following reasons:

- **Lack of Relevance:** The item is outside the Museum's collecting scope or does not have a documented connection to El Dorado County.
- **Irreparable Condition:** The item is damaged or has deteriorated beyond the point of reasonable repair.
- **Duplication:** The Museum has multiple examples of the same item, and this particular example does not add significant interpretive or historical value to the collection.
- **Resource Constraints:** The item requires a disproportionate amount of space, funds, or care to maintain, to the detriment of the rest of the collection.
- **Change in Provenance:** New information reveals that the item's provenance is incorrect, fraudulent, illegal, or unethical.

2. Establishing Title

Before any deaccessioning process begins, the Museum must make every reasonable effort to verify that it has clear and unrestricted legal title to the item.

- **Unknown Provenance:** For items with an unknown history or donor, the Museum will presume it has title unless questions arise that require consultation with County Counsel.
- **Donor Requests:** Requests from a donor for the return of an item will be handled on a case-by-case basis. Such requests will be reviewed carefully by the Museum Commission, as returning items can set a precedent that could negatively impact the Museum's stewardship of its collections.

3. Manner of Disposition

Once an item is formally deaccessioned, it must be disposed of in a manner that is consistent with the Museum's mission and ethical standards. The following methods are listed in order of preference:

1. **Transfer to Another Institution:** The preferred method is to donate or exchange the item with another government-owned museum or non-profit institution.
2. **Use in Museum Programs:** The item may be transferred to the Museum's educational or property collections for use in hands-on programming or exhibits where it can still serve an educational purpose.
3. **Public Sale or Auction:** The item may be sold to the public through a public sale or auction, in full compliance with the County's surplus property ordinance. The Museum will not conduct private sales directly to individuals.
4. **Disposal:** If the item is in a very poor or hazardous condition, or has no value to other institutions or the public, it may be scrapped or discarded.

4. Use of Proceeds

All income derived from the sale of deaccessioned objects shall be used for the direct benefit of the Museum's collections. Funds are restricted to expenses related to:

- The acquisition of new objects for the permanent collection.
- The direct conservation, restoration, or repair of objects already in the collection.

5. Record-keeping and Transparency

Full and permanent records of the deaccessioning process must be maintained for every item. This documentation will include:

- The Museum Commission's approval, as recorded in the meeting minutes.
- The reason for deaccessioning.
- The method of disposition.
- Information on the recipient of the item (if applicable).

All deaccessioning and disposal activities will be conducted in a manner that avoids the appearance of favoritism and maintains the integrity of the Museum and its staff.



DEACCESSION FORM

Original Donor:
(Please print or type)

Original Accession number: _____
Attach original Accession Form (if available)

Date Deaccessioned: _____

Has the original donor been contacted?

☐ Yes

☐ No

Date & Notes: _____

Value of object: \$ _____ **How was this determined?**

Why is this object to be deaccessioned? (Reference "Reasons for Deaccessioning",
DISPOSITION POLICY)

How will this object be deaccessioned? (Acceptable disposal methods are listed on the
reverse.)

Dated: _____ **Museum Administrator:** _____

Approved by Museum Administrator (required):

Dated: _____ **Chairperson Signature:** _____

Reviewed by Museum Commission Chairperson (required):

Was there any disagreement with or within the Commission?

☐ No

☐ Yes. Summarize: _____

Acceptable Deaccession / Disposal Options are (in order of preference):

1. **Transfer to Another Institution:** The preferred method is to donate or exchange the item with another government-owned museum or non-profit institution.
2. **Use in Museum Programs:** The item may be transferred to the Museum's educational or property collections for use in hands-on programming or exhibits where it can still serve an educational purpose.
3. **Public Sale or Auction:** The item may be sold to the public through a public sale or auction, in full compliance with the County's surplus property ordinance. The Museum will not conduct private sales directly to individuals.
4. **Disposal:** If the item is in a very poor or hazardous condition, or has no value to other institutions or the public, it may be scrapped or discarded.

HISTORICAL MUSEUM COMMISSION ORDINANCE #4551

<LINKED>

HISTORICAL MUSEUM COMMISSION BYLAWS

<LINKED>

MUSEUM ADMINISTRATOR, ROLE DESCRIPTION

Reference: General Plan, Objective 9.3.4, Policy 9.3.4.1

Class Title: MUSEUM ADMINISTRATOR

Class Code: 7628

DEFINITION

Under general direction, plans, organizes, and supervises the activities of the Historical Museum; supervises volunteer staff; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from Director of Library Services. Exercises direct supervision over volunteer staff. May provide technical and functional direction to lower-level staff.

CLASS CHARACTERISTICS

This is a single position classification with overall responsibility for the operations and activities of the Historical Museum including the preparation and administration of grants, the supervision and preparation of historical exhibits and the supervision of volunteer docents.

Examples of Duties (Illustrative Only)

- Plans, organizes, and supervises the programs and services related to the operations of the Historical Museum.
- Establishes program priorities to meet professional museum standards
- Plans, organizes, assigns, reviews, and directs the work of volunteer staff; provides for their training and technical development; participates in the hiring and selection of staff.
- Sets customer service standards and directly supervises visitor services and research services volunteers.
- Assists with the development and implementation of the museum's general fund budget; develops and applies non-profit funding sources.
- Coordinates and supervises public relations activities and the development of promotional material for the museum and related activities.
- Oversees the acceptance of artifacts, archival materials, and donations; supervises the preparation of historical exhibits; administers museum collections.
- Develops and oversees the museum's educational programming.
- Oversees site and building maintenance and coordinates with the County's facilities staff for repair work as needed.
- Serves as a resource in matters relating to preserving historical materials; assists researchers in use of museum resources; responds to history related requests; assists the Museum Commission in history related matters.
- Represents the museum on a variety of community and county committees and commissions.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of professional museum operations, including exhibitions, educational programming, and visitor services.
- Principles and practices of professional archival processing, evaluation, and assessment methods.
- Standards and techniques for preservation and protection of natural resources and historically significant artifacts
- Principles and practices of budget and fiscal management.
- Principles of education and public relations techniques.
- Principles and practices of volunteer management and supervision, including recruitment, review, training, and discipline.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Analyze and develop plans for improving museum services.
- Anticipate and analyze financial needs of the Historical Museum.
- Relate museum services to community needs.
- Identify historical significance and interpret artifacts and documents to others.
- Plan, organize, supervise, review, and evaluate the work of others.
- Train others in work procedures.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and the County in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications. and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.

- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education & Experience Requirements

Any combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying.

Equivalent to a bachelor's degree from an accredited four-year college or university with major coursework in anthropology, archaeology, history, or a related field, and two (2) years of experience in historical preservation, museum work, or a related activity. Coursework in museum studies is desirable. Progressively responsible supervisory experience is desirable.

Licenses and Certifications: None required.

Other Requirements

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including mainframe and desktop computers; vision to read printed materials and digital displays; the standard office position requires an employee to access their work location, attend meetings, use computerized workstations, and lift paperwork and light weight equipment or resources (less than 20 pounds). Typically, an employee will need to walk, stand, sit, use a keyboard, see, hear, bend, lift, and twist. The employee obtains information from oral instructions, conversations, written reports, email, the Internet, and professional publications, and will process and analyze the information obtained. The employee will provide information orally or in writing, and work on numerous concurrent projects and tasks under deadlines. Typically, an employee will need to mentally process and analyze complex information, compose complex responses, interact with others, and present information and reports. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve file information. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with members of the public or with staff under emotionally stressful conditions while interpreting and enforcing departmental policies and procedures.

HISTORY

JCN: 7628

Created: November 1998

Revised March 2018 18-0350

ENDNOTES

- I. Malaro, page 46; page 409
- II. Website:
www.aam-us.org/programs/ethics-standards-and-professional-practices/core-documents/
The five Core Documents are:
 - Mission Statement,
 - Code of Ethics,
 - Strategic Plan,
 - Emergency Response Plan,
 - Collections Management Policy.
- III. References used to create this document:
 - Books
 - Malaro, Marie C. A Legal Primer on Managing Museum Collections, Smithsonian Institution Press, 2nd edition. 1998
 - Museum Registration
 - Documents
 - Nevada State Railroad Museum Collections Management Policy (2006)
 - California State Railroad Museum Collections Management Policy (2010)
 - National Park Service Museum Handbook (2006)
 - Museum Associations
 - California Association of Museums (CAM) General Annual Meeting sessions on current collections management practices (2020)
 - American Alliance of Museums (AAM) website at www.aam-us.org
 - American Association of State and Local History (AASLH) website at www.aaslh.org
 - "Connecting to Collections" reference library in the Museum Administrator's Office
- IV. AASLH "The Capitalization of Collections Ethics Position Paper #1"