

**WILLIAM WAY LGBT COMMUNITY CENTER
JOHN J. WILCOX, JR. ARCHIVES
COLLECTIONS MANAGEMENT POLICY**

Adopted by the Archives Advisory Committee: 2/29/2016

I. INTRODUCTION

A. Statement of Purpose

This Collection Management Policy governs all aspects related to the development, management, preservation, and use of the John J. Wilcox, Jr. Archives (hereafter referred to as “the Archives”) held by the William Way LGBT Community Center (hereafter referred to as “WWCC”). The policy provides a framework of professional standards to establish guidelines for managing the collections.

The Collection Management Policy is a comprehensive written statement that:

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

B. Process of Establishing Policy

This policy was researched and drafted by William Way LGBT Community Center staff with the assistance of the Conservation Center for Art and Historic Artifacts (CCAHA) as part of an initiative funded by the William Penn Foundation.

The Archives Advisory Committee actively reviewed and commented on the policy. The final draft was submitted to the WWCC’s Board of Directors for comment and acceptance.

This collection management policy is to be considered a working document. Any errors, omissions, or other necessary changes will be identified and updated by WWCC staff in a timely manner.

C. Statement of Authority

The William Way LGBT Community Center is overseen by a Board of Directors. The day-to-day management of the WWCC is delegated to the Executive Director, who bears the ultimate responsibility for implementation of this collections management policy, and entrusts the Chief Operations Officer, the Director of the Archives/Archivist, and the Curator with the authority to implement the policy.

D. Archives Advisory Committee Charge

This Committee, including WWCC staff members, Board members, and unaffiliated experts, responsible for the Archives collection, will be available to provide advice to the Board on the oversight of the collection and all matters pertaining to collection care and management including acquisitions, de-accessions, loans, collection maintenance and conservation, insurance, and description. Moreover, this Committee has the mandate to be conversant with current legal, ethical and professional standards regarding collection management.

The Committee will meet periodically, and will formulate and recommend to the Board policies, policy revisions, and actions necessary for the care and management of the collection.

E. Code of Ethics

WWCC recognizes that the Society of American Archivists (SAA), the American Library Association (ALA), and the American Association of Museums (AAM) have made the effort to bring an awareness of ethical standards to archives, library and museum professionals through the current guidelines set forth in their various codes of ethics: SAA's *Code of Ethics for Archivists*, ALA's *Code of Ethics*, and AAM's *Code of Ethics for Museums*. In general principle the Archives affirms and supports the contents of these codes.

F. Review and Revision

This policy shall be reviewed by Archives staff on an annual basis and updated as needed. Any major changes regarding the collections and/or their management may necessitate more frequent revisions. The Archives reserves the right to change the policies without notification to donors, their heirs, or assigns.

G. Public Disclosure

Once approved by the Archives Advisory Committee, copies of this Collection Management Policy will be provided to all members of the Board of Directors and appropriate staff of the WWCC. Copies of the Policies will be provided to present and future donors upon request.

II. MISSION AND COLLECTIONS OF THE JOHN J. WILCOX, JR. ARCHIVES

A. Institutional Mission Statement

The William Way LGBT Community Center's mission is to encourage, support, and advocate for the well-being and acceptance of sexual and gender minorities in the Greater Philadelphia region through service, recreational, educational, and cultural programming.

The mission of the Archives is to collect, describe, interpret, and provide access to publications, personal papers, organizations and business records, audiovisual materials, and ephemera created by, dealing with, or of special interest to gay, lesbian, bisexual, and transgender individuals.

B. Purpose, Scope, and Use of the Collection

The purpose of the Archives is to identify, acquire, preserve, and make accessible archival and reference documents and artifacts relating to:

- LGBT History, generally
- LGBT History in the City of Philadelphia and the Delaware Valley

- History and operations of the WWCC and its predecessors

These records are made available to the LGBT community of Philadelphia and the Delaware Valley, scholars and researchers, students, teachers, local history researchers, journalists, WWCC staff, and the broader public through appointments to work with the materials, exhibits, programs, and research conducted by the Archives staff.

C. Description of the Collections

The John J. Wilcox, Jr. LGBT Archives of the William Way LGBT Community Center documents LGBT history, generally, and the LGBT history of Philadelphia and the Delaware Valley, specifically. Additionally, the collections illuminate the area's homophile and early LGBT rights movements. The Archives contains named collections donated by local individuals and organizations; periodicals (magazines, journals, newspapers and newsletters) from the 1950s to the present; ephemera and newspaper clippings; textiles and artifacts (from political buttons and matchbooks to t-shirts and leather chaps); rare books and pulp fiction novels; posters, calendars, art works, and travel guides; and audio-visual material, comprised of a wide variety of media types.

III. ACQUISITIONS/ACCESSIONS

A. Methods of Acquisition

The Archives is empowered by the Board of Directors to acquire by gift, bequest, exchange, transfer, or purchase objects, books, periodicals, and archival materials for the collection.

“Acquisition” is the addition to the collections by any means in which an object is in the Archives’ custody. “Accessioning” is the process in which the title to an object passes to the Archives, establishing legal custody and ownership and providing information on how the Archives acquired the item.

B. Authority

The Executive Director, Director of the Archives/Archivist, and/or the Curator are responsible for initiating the acquisition process.

All purchased additions to the Archives of the value of \$500.00 or more must be approved by the Archives Advisory Committee. The Archives staff should prepare a brief statement in advance of any such deliberation by the Committee showing how the object in question meets the criteria defined in this Collections Management Policy.

C. Criteria for Collection Acquisition

The Archives only accessions an object for the collection with the intention of retaining it for the long term. No artifacts or documents shall be accepted into the Archives with the sole purpose of being deaccessioned and sold to fund-raise.

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

1. Collecting Scope

The Archives will only accept acquisitions that fall into its various collecting scopes, as described previously in this policy, and as outlined in more depth in the Collection Development Policy. Objects must, in general, have historical significance and relevance as related to these collecting areas.

2. Format

- The primary formats collected include printed texts, manuscripts, graphics, artifacts and objects, textiles, audiovisual materials, and born digital materials.
- If records in an unusable format (e.g. electronic or audiovisual materials for which the Archives does not have the proper playback equipment) are acquired, provision for their transfer onto other data sources should be made at the time of their acquisition.

3. Title

The current owner of the object may be asked to declare in writing through a Deed of Gift that the owner has clear title to the object. At its discretion, the Archives may request documentation of an object's provenance. A sale or donation to the institution will be a legal transfer from the seller or donor to WWCC. If the seller or donor owns copyright, this is customarily transferred to WWCC as well.

4. Condition

- The object is in exhibitable condition or, if for study, sufficiently stable to permit that activity.
- The object is not hazardous (i.e. toxic, radioactive, or explosive) to people or property.
- Exceptionally large or damaged objects, or any object that cannot immediately be made available for research due to its size, poor state of preservation, physical instability, risk to staff or other objects, etc., will be evaluated on a case-by-case basis, and provisions for the care and conservation of the object will be taken into account before accepting the object(s).

5. WWCC's Resources

- WWCC can afford to transport, catalog, and conserve the object. If an object is not offered as a gift, bequest, or loan, WWCC must foremost be able to afford to purchase the object based on an annual budget, to be approved by the Board of Directors.
- The object can be secured, stored, and exhibited safely.

6. Duplicates

In general, the Archives will not acquire exact duplicates of objects or archival material. Exceptions to this may be considered on a case-by-case basis under the following circumstances:

- An object is rare or represents a significant WWCC connection.
- Items that are duplicates of objects already in the collection may be accepted if they are in better condition, have a particular historical significance or association, or may be used for loans.
- Duplicate items may also be accepted into the Archives' Reference Collection.

7. Reference Collection

The Archives may also accept donations of non-collection reference materials, equipment, supplies and items given to support and further its educational objectives. Duplicate historical objects that do not meet the above criteria may be incorporated into the Reference collection. When new objects or material are designated as part of the Reference collection at the time of acquisition, the donor will be made aware of this decision.

8. Legal and Ethical Considerations

The object has not been illegally imported into the United States or illegally collected within the United States.

9. Conditional Acquisitions

Gifts, bequests, and loans should only be accepted if they conform to the stated policies of the Archives. Objects that are subject to the imposition of special and restricting conditions may not be accepted if the conditions are contrary to the short-term and long-term interests of the Archives.

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

- The Archives will not accept collections donated with the condition that the entire collection be accessioned. The Archives has the right to choose, within a proposed donation, which items they wish to keep.
- The Archives will not accept materials that are restricted from public access in perpetuity. Some collections or portions of collections may be designated restricted for a reasonable and finite period of time with the advanced agreement between the Archives and the donor.

D. Acquisition Terms and Restrictions

The Archives will not pay for an appraisal of the proposed gift for a donor, nor will a Board member, an Archives Advisory Committee member, or any employee, consultant, or volunteer employed by or associated with the Archives appraise a potential gift for a donor.

No person who is involved in the management of WWCC, or who is a member of the staff, Board, or Archives Advisory Committee, may compete with the Archives for objects or may take advantage of privileged information which has been received. Should a conflict of interest develop between the needs of the individual and the Archives, the needs of the Archives will prevail.

Items will not be accepted and formally accessioned that will directly be deaccessioned and sold.

Materials that do not fall within the scope of the Archives collecting areas or that duplicate existing holdings may be deaccessioned in accordance with the Archives' policy on deaccessions, subject to the terms of acquisition, WWCC regulations, and state and federal laws. Duplicate gifts are often made available to similar collecting institutions.

Unless specified otherwise, donors may be publicly acknowledged for their gifts, for instance, in exhibition labels, publications, finding aids, etc.

E. Documentation of Acquisitions and Accession

The complete procedure of acquiring and accessioning any object should be recorded. An acquisitions record should be created in an archival management system. All documents relating to the object, including the signed Deed of Gift, will be deposited in the relevant collections files.

To achieve complete accountability for objects in the Archives' custody, the Archives will register all objects temporarily left in its care for any purpose including identification, photography, study, or as a potential donation or bequest. Potential donors may leave objects at the Archives for a period not to exceed thirty days with a Temporary Custody form; within thirty days, either the accession process will be initiated and the donor will receive a Deed of Gift, or the object will be returned to the donor.

IV. DEACCESSIONS AND DISPOSAL

Deaccessioning is an important collections management tool that is employed by collecting institutions around the world for a variety of reasons. Because deaccessioning can adversely affect an institution's collection, reputation, and even ability to fundraise in a lasting way, all objects proposed for deaccessioning from the Archives must be subjected to a thorough review. Those of significant intellectual, monetary or associative value must be approved by the Board of Directors. Procedures for the deaccession or disposal of materials will be at least as rigorous as those for accessioning and should be governed by the same basic principles. The decision to dispose of materials must be made only after full and scrupulous consideration of the public interest and the needs of researchers; the process of deaccession will be carried out in as open and public a manner as possible.

Because of the primacy of preserving archival materials in their original format and, concomitant with that, the role of archives as repositories for cultural history, the Archives will carefully assess all materials before accepting them to lessen the likelihood of deaccession. This said, there are valid reasons why materials in archives may be deaccessioned.

Acknowledging these points, The Rare Book and Manuscripts Section of the Association of College and Research Libraries included a lengthy set of guidelines for deaccession of materials in *Standards for Ethical Conduct for Rare Book, Manuscript, and Special Collections Librarians, with Guidelines for Institutional Practice in Support of the Standards*, 2d edition, 1992. The following policy for deaccession of materials from the Archives incorporates and upholds the standards established by RBMS for the ethical deaccessioning of materials from special collections.

A. Authority

When an object is considered for deaccessioning, the staff of WWCC should prepare a brief statement showing why the object in question is appropriate for deaccessioning. If any uncertainty exists or if any object in question is of considerable value, the recommendation may be presented to the Archives Advisory Committee for discussion prior to a presentation to the Board of Directors. The Board of Directors may deliberate the wisdom of any proposed deaccession, and introduce a motion to that end at any regular meeting. However, said motion shall not be voted upon until the next regular meeting of the Board of Directors.

Items from the Reference collection need not be subject to as strict a system of approval as those from other archival collections. The Director of the Archives/Archivist shall have the authority to deaccession materials that form part of the Reference collection at WWCC. The Director of the Archives/Archivist shall report to the Board of Directors at least annually on such activities.

B. Criteria for Deaccession

Deaccessioning is the process of permanently removing accessioned archival collection objects and materials from WWCC's ownership. The sole purpose of deaccessioning any object or archival material within the Archives is to refine and strengthen the overall collection. This should be achieved either by acquiring objects of better quality and significance with designated deaccession proceeds, or by deaccessioning an object of no value in order to make it possible to give appropriate space and conservation care to the remaining objects.

Because the Archives is aware of its role as a steward of the collection for the benefit of the public, it only acquires objects that it intends to retain in perpetuity and not with the intention of disposing of them.

To be considered for deaccessioning, an object must:

1. be free from donor mandated restrictions;
2. be fully and legally owned by WWCC;
3. meet at least one of the following criteria:
 - The object does not meet the criteria defined previously for purpose and scope, and hence does not bolster the mission of the Archives.
 - The object or material is redundant or is a duplicate, has no value as part of a series, and as such does not enhance teaching, research or study.
 - The object or material is unduly difficult or impossible to care for or store properly.
 - The object is in a format that the Archives cannot support, and has been (or cannot be reasonably) converted to another format.
 - The object has been extensively damaged, or presents a risk to other materials in the collections, or to the staff and researchers working therein, and cannot be restored without compromising its integrity.
 - The object or material was acquired illegally or unethically, is requested for repatriation by aboriginal groups or foreign governments, or another person or entity is shown to be the rightful owner.
 - The Archives has not been able to obtain satisfactory title to the object.
 - The object has not retained its identity or authenticity. Such objects should be clearly and permanently marked and should not be disposed by means of sale.
 - The Archives is unable to preserve or manage the object or material properly.
 - The object or material was lost or stolen and has been missing for more than three years.
 - The object or material was given by a donor with the express understanding that it may be sold or given away.

Archival processing includes weeding and disposal of material on a regular basis. Material discarded as a part of this normal process is not subject to the same rigor of deaccession procedures that accessioned collections objects and materials are.

C. Restrictions and Conditions of Deaccession

- In the deaccession of material, the Archives will weigh carefully the interests of the public for which it holds the collections in trust, the interests of the scholarly and cultural communities, and the Archives' own mission.
- The Archives will consider any legal restrictions, the necessity for possession of valid title, and the donor's intent in the broadest sense. If an object has been received as a gift or bequest with conditions imposed, the restrictions should be honored and reasonable efforts will be

made to notify the donor, or members of the donor's family, if necessary. Mandatory restrictions on disposition which accompanied a donation will be observed unless it can be shown clearly by appropriate legal procedures that adherence to them is impossible or substantially detrimental to the Archives. When statements of donor's preferences accompany an acquisition, any departure from them will be carefully considered and negotiated with the donor or the donor's heirs or settled by appropriate legal procedures.

- Any donor or any person who contributed funds to the purchase of the object which is being considered for deaccessioning must be consulted whenever possible.
- If an object was received by the Archives as a gift **in which no tax deduction was taken**, the object may be offered back to the original donor. If the donor did take a tax deduction for the gift, the object will not be returned.
- Under no circumstances may a deaccessioned object be given to or otherwise placed in the possession of a WWCC staff member, officer, or volunteer; a member of the Archives Advisory Committee; a member of the Board of Directors; or any representative or immediate family member of the aforementioned. They are, however, eligible to purchase deaccessioned objects that are offered at public sales.

D. Methods of Deaccession and Disposal

The Archives may dispose of a deaccessioned object by donation to or exchange with a non-profit institution, by public sale, or by destruction when it is warranted. The Archives will ensure that the method of deaccession will result in furthering the agreed purpose of the deaccession, whether this be monetary gain or more appropriate placement of scholarly resources.

Proceeds from public sale will be placed in a restricted account to be used to acquire and to care for collection objects. Income from the sale of deaccessioned objects will not be used to defray ongoing operating expenses but to enhance the collections.

When recommending deaccessioning, all acceptable professional means of disposal must be considered. Deaccessioned objects are usually disposed of through the following means, as directed by the Board of Directors. The method will be determined on a case-by-case basis for each deaccessioned object.

1. Transfer. Objects or archival material may be transferred to WWCC's Reference collection.
2. Gift. Due consideration should be given to the archival community in general when disposing of items. Objects should first be offered to a non-profit institution with a mission similar to that of the Archives, and then to other non-profit institutions. The object's provenance will clearly be indicated. In any instance where title is transferred to another entity, the Archives will disclose to the potential new owner or intermediary agent any action, such as the retention of a photocopy of the material, which may affect the monetary or scholarly value of the material.

3. Exchanged. When objects are exchanged, they should be exchanged with the purpose of obtaining better examples of the same kind of work.
4. Sold. Objects will be offered through a public sale for purchase. Deaccessioned objects that may have significant monetary value, which are to be sold, should be sold only after the objects have been appraised by an appraiser who has no personal desire to obtain the objects and who is able to give unbiased and uncompromised appraisals. Deaccessioned objects are not to be sold to a single dealer or to a private collector unless such individuals have submitted the highest bid as part of a public auction or sealed-bid invitation to a large group.

In no case shall a private sale, or a gift or transfer, to an individual or a for-profit institution, be acceptable.

5. Destroyed. This option should be considered only after all other means of deaccessioning have been exhausted, and only after it has been determined that no entity will buy the object or accept it as a donation. Deaccessioned objects may also be destroyed if they have deteriorated so severely that they are no longer useful, and/or if they pose a hazard to staff, public, and/or other items in the collection. If condition of the object is a criterion for deaccessioning, the Archives may wish to obtain the recommendation of a conservator in the relevant medium before making the final decision.

E. Deaccessioning Undocumented Objects

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

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

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

If an undocumented object is found to have or can be reasonably assumed to have very little monetary value, the Archives may choose to donate the object to a nonprofit organization. The lack of title transfer will be transparently stated.

If undocumented objects are deemed to have deteriorated beyond repair, if disposal is required to protect the objects themselves or other objects in the Archives, and/or if they have become a hazard to health and safety, immediate action may be taken. The Archives may wish to obtain the recommendation of a conservator in this event.

F. Ethical Considerations

The Archives realizes that it has a public responsibility and accountability for its decision to deaccession an object, and for the method by which deaccessioning is implemented. The procedure will be documented and there should be no effort to conceal the transaction.

The proceeds of all sales should go into a conservation/acquisition fund, and efforts should be made either to replace an object with that of approximately commensurate value, or to put the funds toward the conservation care of other objects in the collection.

G. Documentation of Deaccession and Disposal

Responsibility to the needs and reputation of the Archives requires that, in preparing for and accomplishing any deaccession, the Archives will take care to define and publicly state the purpose of the deaccession and the intended use of monetary or other proceeds of the deaccession, to avoid any procedure which may detract from the Archives' reputation for honesty and responsible conduct, and to carry out the entire process in a way which will not detract from public perception of its responsible stewardship.

The complete procedure of deaccessioning any object should be recorded, including the following information:

- date of deaccession
- method of deaccession
- object number (if applicable)
- detailed physical object description, including measurements, materials, and condition at the time of deaccession
- object's monetary value – as appraised or estimated
- photograph of object

Once an object has been approved for deaccessioning, the WWCC staff will prepare a brief statement to the Archives Advisory Committee showing why the object in question has been or will be deaccessioned and what will be done with the proceeds (where applicable). The Committee will make the decision as to whether a public statement explaining the deaccession is necessary, and release such statements accordingly.

All documents related to the deaccessioning process should be deposited in the relevant collections files and retained there permanently. Deaccessioning purpose and date should also be recorded on any object records, physical or electronic.

V. INCOMING LOANS

A. Types of Incoming Loans

WWCC may borrow items on loan for the purpose of temporary exhibitions for up to one year, long-term exhibitions for up to ten years, or for research being undertaken by members of the WWCC staff.

B. Terms and Conditions of Incoming Loans

Incoming loans will be accepted from individuals or institutions for exhibition or current research. Because of the liability and expense, WWCC cannot store and maintain items belonging to others that are not required for exhibition or ongoing research.

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

1. WWCC has determined that it can afford the estimated cost of exhibition, storage, security, transportation, collection maintenance, and all risk, wall-to-wall fine arts insurance on the items at the value established by the lender unless the lender waives insurance requirements in writing. The amount payable by such insurance is the sole recovery available to the lender in the event of loss or damage.
2. If the lender prefers to provide insurance for the object, the lender shall have WWCC listed as additional insured on the policy or will obtain for WWCC a waiver of subrogation.
3. WWCC can provide the care and protection that meet or exceed standards required by the lender. Loaned objects will be kept in a building under 24-hour physical or electronic security and protected from unusual temperatures, humidity, and excessive light, and from insects, vermin, dirt, and other environmental hazards. Borrowed objects will only be handled by experienced personnel.
4. Only objects that can withstand the normal rigors of packing, transport, handling, and display will be accepted as loans at WWCC. WWCC staff will conduct a basic condition report upon receipt of a loaned object and prior to the object's return to the lender.
5. WWCC can and is willing to meet any restrictions the lender has placed on the object.
6. The lender will declare in writing that the lender owns the object. WWCC will not borrow from a third party.
7. In its treatment of the borrowed objects, WWCC will abide by the same conditions it places on objects it lends.
8. If objects loaned to WWCC become damaged or lost, the lender will be notified immediately, followed by a full written and photographic report. If damage occurred in transit, WWCC will also notify the carrier and save all packing materials for inspection.
9. WWCC will not perform any type of conservation, cleaning, reframing, repair, or other action that alters the physical condition of a borrowed object without written approval from the lender.

10. Unless permission is refused in writing, WWCC may photograph incoming loaned objects for purposes of record keeping, education, and publicity, and reproduction in publications relating to the exhibition in print and digital format. WWCC will not create reproductions of objects for commercial purposes without written approval from the lender.
11. If there is a change in ownership of an object loaned to WWCC, including a change in the lender's name or address or the dissolution of a lending institution, the lender must notify WWCC promptly in writing. If the legal ownership changes during the loan term, the new owner shall, prior to the object's return, be required to provide documentation of his/her legal right to receive the object.

C. Long-Term Loans

WWCC does not normally accept objects on permanent or indefinite term loan. A clear loan term with definite beginning and ending dates must be stated on all loan agreements. The maximum term for any incoming loan is one year. All loan agreements must be re-evaluated with the possibility for renewal after one year. A longer-term loan agreement may be possible with approval of the Archives Advisory Committee.

If objects are found in the collection that were previously deposited at WWCC as permanent or indefinite loans, staff will make all possible efforts to contact the lender or immediate heirs of the lender in order to:

- Convert the loan into a gift, if the object is consistent with WWCC's mission and collecting criteria.
- Negotiate a new long-term loan agreement with the lender.
- Return the object to the lender or the lender's heirs.

If staff are unable to locate and contact an object's original lender, they must document all efforts and keep all documentation in the object's file.

If a donor or his heir claims ownership of a found-in item and wishes for the item to be returned, the burden of proof is on the claimant. The claimant will need to produce an original loan certificate in order to reclaim the object, and produce proof that he is the legal heir of the original donor.

VI. OUTGOING LOANS

A. Approval Process for Outgoing Loans

Outgoing loans will be considered on a case-by-case basis, and must be approved by the Executive Director.

B. Criteria for Outgoing Loans

The Archives will evaluate requests to lend materials and reproductions for exhibition at other institutions when the policies and facilities of those institutions meet accepted national exhibition loan standards of security, climate control, and insurance coverage, and when proper credit is given to William Way LGBT Community Center and the John J. Wilcox, Jr. Archives. Institutions wishing to borrow materials should begin the process early (often a year or more in advance) and must submit proper documentation before an agreement will be signed.

When assured that proper care and protection will be provided, WWCC may lend objects to promote public education through study and exhibition.

1. No loans will be made to private individuals.
2. At all times the preservation of collections objects will take priority.
3. Requests for loans should be received at least six months in advance of expected delivery date.
4. Before materials will be lent the following criteria must be met:
 - There are no restrictions on the requested object that preclude making the loan;
 - The item is in good condition and can withstand the stresses of travel, handling, study, and/or exhibition;
 - The loan will not jeopardize WWCC's own program;
 - The item is owned by WWCC and not on loan to it;
 - All items involved in the loan are accessioned and, preferably, photographed;
 - The borrower agrees to all conditions established by WWCC.

C. Duration

Loans from the Archives will, in general, not exceed duration of one year. If the borrower wishes to keep an object longer than two years, the loan agreement will be re-evaluated annually with the possibility for renewal, on an item-by-item basis.

D. Requirements and Obligations for Borrowers

1. General Facility Report

In order for WWCC to expedite a loan request, it is required that the borrowing institution complete a General Facility Report which indicates the conditions under which the object will be displayed.

2. Object Condition

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

The borrowing institution must not perform any conservation, cleaning, fumigation, treatment, reframing, marking, or any other action that alters an object in any way without the written approval of WWCC. In the event that an object might become damaged while in transit or at another institution, the borrower must report any damages to WWCC immediately. The borrowing institution is required to pay all conservation costs performed by a conservator who has been approved by WWCC.

3. Costs

It is understood that the borrowing institution is required and agrees to pay all costs of any special conservation work on requested objects. Furthermore, the borrowing institution is required to assume the responsibility for all shipping costs, including any special packing that might be required; insurance costs in transit and on location; and all courier fees. WWCC must approve all arrangements, and a cost estimate for all charges will be forwarded to the institution requesting the loan.

The borrowing institution must provide a certificate of insurance for any and all risk, a wall-to-wall fine arts policy covering the items at the value established by WWCC for the duration of the loan, including transit to and from the borrowing institution and while on the institution's premises, unless the item is of minimal monetary value and WWCC has waived insurance.

4. Reproduction

The borrower may photograph an object for record-keeping, educational, or publicity purposes. Any reproduction for sale may only occur with the written approval of WWCC. Framed items may not be removed from their frames for photography.

VII. DOCUMENTATION

A. Collection Object Records

WWCC will initiate and maintain up-to-date records of all objects entering the Archives, including gifts, purchases, loans, or any other type of acquisition, even temporary. Records are managed in an archival management system.

B. Backup System for Records

WWCC records will be safeguarded from loss, destruction, and degradation. The institutional server, including all database records, is backed up at least once a month.

C. Inventory

To properly maintain, manage, and secure its holdings, the Archives will perform inventory spot-checks in collections storage on a regular basis.

VIII. COLLECTIONS CARE

WWCC is responsible for the care and preservation of all objects under its jurisdiction, including the permanent collection as well as loans. In addition to performing the types of care and management described in other sections of the policy, the Archives will:

- Provide intellectual access to all collections by appropriate cataloging, description, or digitization;
- Maintain collections in secure and environmentally appropriate conditions within the constraints of budget and space allocation within WWCC;
- Maintain a comprehensive collection preservation program;
- Perform in-house assessments of collections on a regular basis: as collections are accessioned, in response to problems that are revealed during patron use, through condition surveys of specific collections, and when items are chosen for exhibition;
- Take measures to prevent the theft, vandalism and destruction, or damage by pests or by fire, water, or other elements;
- Ensure that objects are handled appropriately and receive adequate collection maintenance and professional conservation care;
- Maintain a budget line item for collections care and conservation; and
- Carry out all legal, ethical, and professional responsibilities required to provide the necessary care for all objects acquired, borrowed, or placed in WWCC.

IX. INSURANCE AND RISK MANAGEMENT

A. Insurance Policy

Though insurance is not a substitute for safety, security, or professional collections care, it does provide compensation in the event of unforeseen loss or damage. WWCC will provide fine arts insurance coverage for its collections.

B. General Risk Management

The Archives maintains a comprehensive security plan, which governs all areas of collection security from physical space control to patron and staff use regulations, and works closely with the WWCC's building maintenance staff to keep the plan in operation.

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

WWCC must ensure that an Emergency Preparedness and Response plan is in place in order to mitigate potential damage in the event of disasters and emergencies. The contents of the plan, particularly procedures, contact lists, and collections priorities for salvage and/or conservation, must be reviewed and updated annually, and more frequently if necessary.

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

X. ACCESS AND USE

A. Collections Access

All members of the public may request to examine or study collections items in the Archives during normal business hours, provided they contact Archives staff in advance and schedule an appointment. Collections are accessible contingent upon staff availability and consistent with accepted security and preservation practices. All collections are non-circulating and all materials must be used on site. Procedures for the use of the collection will be established by the Director of the Archives/Archivist and the Curator.

B. Terms and Conditions

The Archives reserves the right to refuse access to certain objects in the collection if they are unprocessed, or deemed too fragile or unstable for use. Staff may also limit the amount of researchers using particular collections at one time. Users may be liable for any damage caused to collections.

Areas where researchers are using collections will be monitored by a member of the staff at all times, and staff will instruct researchers in proper handling methods for collections. Users must comply with the Archives' conditions regarding examination, handling, photography, and the use or dissemination of collection information.

To protect the privacy of donors and the security of the collection, access to certain information in the object files may be restricted. Donor's contact and other personal information will not be provided without their permission. Insurance and appraised values of collections will be kept confidential. The WWCC reserves the right to deny access to other types of information contained in its collection records.

XI. INTELLECTUAL PROPERTY

A. Publishing

In providing permission to publish material obtained from the Archives, the WWCC does not assume any responsibility for infringement of copyright or of publication rights in the material which may be held by

others, and the publisher assumes all responsibility for any claims under the Copyright Law of the United States or the laws of libel which may be made as a result of the publication.

The publisher agrees to indicate the credit, "John J. Wilcox, Jr. Archives, William Way LGBT Community Center." as the source of the archival material in all published works. A dissertation or thesis is considered to be a published work.

It is the researcher's responsibility to determine whether materials in the collections are in the public domain or protected by copyright. A statement of permission must be obtained from the holder of the rights, and proper credits used, for all documents being reproduced that are not the intellectual property of the Archives. The responsibility for obtaining any additional permission required for the publication of collection materials remains with the publisher of the material.

Permission granted is for one time publication use. In granting permission to publish, the WWCC does not surrender its own right after that to publish any of the materials for its collection or grant permission to others to publish them. In return for permission to publish, a final copy of the publication should be provided to the Archives.

B. Reproductions

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

Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of the specific conditions is that the photocopy or reproduction is not to be "used for any purpose other than private study, scholarship, or research." If a user makes a request for, or later uses, a photocopy or reproduction for purposes in excess of "fair use," that user may be liable for copyright infringement. Copies are permitted for personal and research use only, and Archives staff reserve the right to refuse permission.

The use of personal digital cameras in the Archives is encouraged in lieu of placing photocopy requests. Self-service photocopying is permitted with staff approval. Many materials are physically sensitive and cannot be photocopied; restrictions will be determined at the discretion of Archives staff.

Requests for photocopies or scanned images of materials may be made to the Archives by e-mail. Conditions of the individual documents and the size of the job will determine whether a request can be accepted. Payment is due in advance of reproduction.

Users must agree to the following conditions:

1. User agrees to hold the WWCC, its agents, and employees harmless from any and all claims or liability of any kind arising out of or related to use of the protected material.
2. Any use of such material will be accompanied by a copyright notice, attribution to the named collection, acknowledgment of the photographer if applicable, and the credit line "John J. Wilcox, Jr. Archives, William Way LGBT Community Center."

3. With respect to materials in which copyright is held by an entity other than WWCC and the copyright holder is known, user will obtain permission from the owner of the copyright to use the material and will comply with all requirements of the owner regarding notice.