

**Everson Museum of Art
COLLECTION MANAGEMENT POLICY**

The following policy was approved by the Board of Trustees on December 20, 2010; amended on April 20, 2015; amended on July 20, 2020; amended on August 16, 2021.

I. INTRODUCTION & MISSION

A. Purpose:

Everson Museum of Art was founded as the Syracuse Museum of Fine Art in 1897, and consolidated as the Everson Museum of Art of Syracuse and Onondaga County in 1959. Its charter granted by the University of the State of New York in 1900, states that its purpose is “to conduct, develop, support and seek community-wide participation in a unified cultural program in the field of art.” The mandate has been and remains “to collect, preserve, exhibit and interpret original works of art.” Philosophically, the rationale for these broad, essentially educational purposes is to foster cultural identity and perspective and to enhance aesthetic awareness for as wide a constituency as practicable. The Everson is a general museum of art and a center for visual arts interests in the region of central New York. While its collections are intended to specialize in only certain areas of art (American Art, ceramics), Everson’s programming is more inclusive and is open to a diversity of interests in the arts, having wide ethnic, historic and media scope. Through special exhibitions, the Everson attempts to bring a variety of art to central New York to inform, enlighten and inspire its audiences. The Everson provides a special place for contemporary art to be shown as well as a place for art of the past to be preserved, studied and exhibited.

B. Mission Statement:

Our Mission: As the first museum devoted to collecting American art, the Everson uses this focus to make possible direct encounters with all art through its collections, exhibitions, scholarship, and educational programs.

C. Statement of Authority

The Everson Museum of Art is a privately funded, not-for-profit organization.

Board of Trustees

The Everson Museum of Art is governed by a thirty-one member Board of Trustees drawn for their expertise, interest and service. The Board, led by the President, is charged with setting the direction of Museum business. The Board is responsible for approving Museum goals, policies and for raising funds and approving the annual budget. The Board is also responsible for the development of the collection and is assisted via sub-committee, Collections Committee. This committee acts in an advisory capacity for the Museum’s collecting and exhibitions programs by taking Curatorial Staff and Director proposals into account when making recommendations to the Board of Trustees. The Board of Trustees has final approval of all acquisitions, deaccessions and outgoing loans.

The Executive Director

The Executive Director of the Everson Museum of Art works directly with the President of the Board of Trustees and other Board members in managing the operation of the Museum. The Executive Director is guided by the policies outlined in this document, which has been approved by the Board of Trustees. However, the overall responsibility for the management of the Museum’s collection lies with the Executive Director. The Executive Director shall

delegate specific responsibilities to appropriate members of the staff in managing the collections.

Staff

The prime directive for the Executive Director and all museum staff is the protection and preservation of the collections. The Staff shall be guided by the policies outlined in this document in their collections-related work. The immediate responsibility for the physical care of the collection lies with the Curator who must balance the need for conservation and maintenance for each object with the need for public access and research, special exhibitions and funding. The Registrar is responsible for insuring the physical well being of the collections through proper risk management and for creating and maintaining detailed collections records.

II. COLLECTIONS STATEMENT:

The Everson's permanent collection encompasses approximately 11,000 objects, including paintings, ceramics, sculpture and videos. Although the collection has changed and grown substantially over its 100+ year existence, the Everson's current collection continues to grow and has been steered by decisions made early in the museum's history.

Within 20 years of its founding, the Everson made three character-setting decisions under the leadership of Fernando Carter, the second director of the museum. In 1911, it declared that it would collect only American art-the first museum anywhere to do so. During Carter's time as director (1910-1931), the Everson acquired many 19th century paintings, as well as American Impressionist and Tonalist works of the early 20th century.

The second decision was the 1916 purchase of a small group of porcelains from art potter and Syracuse resident Adelaide Alsop Robineau (1865-1929). Today, the Everson houses the largest holding of Robineau works in the world, forming the basis for its renowned ceramics collection.

The third was the decision to collect representative works by regional artists, a tradition that still continues. In addition to education exhibitions that feature the artwork of local students, the Everson routinely includes Syracuse and Central New York artists in its Biennial Exhibition.

American Paintings

One of the Everson's primary collections is of American paintings, with nearly 700 artworks that span two centuries. Among the 19th century artists represented are Gilbert Stuart, Edward Hicks, Charles Loring Elliot, Eastman Johnson, Severin Roesin, Celia Beaux, Jane Peterson and Abbott Handerson Thayer. Early Modernists include Charles Hawthorne, Robert Henri, John Sloan, John Marin and Arthur B. Carles. Mid-century painting is represented by Jackson Pollock, Adolph Gottlieb, Milton Avery and Andrew Wyeth.

A particular concentration in the collection, landscapes of New York State by New York State artists, is best represented by second-generation Hudson River School, tonalist, and impressionist painters, but also regionalist and early modernists (William Ongley, Sanford Gifford, Levi Wells Prentice, George Inness, Henry W. Ranger, Roswell S. Hill).

Paintings by 1960s abstractionists Helen Frankenthaler, Morris Louis, Al Held and Jules Olitski are also included in the collection, in addition to paintings, photographs and multimedia works

from the 1980s by Barbara Kruger, Cindy Sherman, Les Levine, Nancy Spero, Malcolm Morley, Jean-Michel Basquiat and Philip Guston.

Ceramics

The ceramics collection of the Everson is widely recognized for its magnitude and magnificence. Currently one of the largest holdings of American ceramics in the nation, the Everson's collection can be attributed to the decisions made by Carter in the early 20th century. After the initial purchase of Robineau porcelains in 1916, the Everson acquired more of her artworks. Then, in 1932, the *Ceramic National* exhibitions were established at the Museum in her memory. An important series of exhibitions that ultimately changed the public opinion on ceramics (from craft to art form), the *Ceramic Nationals* enabled the Everson to amass a singular collection of American ceramics produced during the past seven decades. Today, the collection of American ceramics numbers over 4,000 pieces that range in date from 1000 AD to the present, from works by ancient Americans of the Southwest to the most cutting-edge examples by contemporary artists. The American Art Pottery collection, a diverse grouping of over 2,000 pieces, includes both hand-crafted ceramics and examples of commercial ware. The Everson has exemplary works by most of the major potters, including Robineau, Rookwood, Fulper, Grueby, Tiffany, George Ohr, Newcomb and Marblehead.

The period spanning the 1930s to 1960s is documented by significant pieces from the major movements of those decades. In the area of figurative sculpture, there are works by Wayland Gregory, Suzy Singer, Vally Wieselthier, Victor Schreckengost and Guy Cowan. Mid-century pots reflective of European and Japanese influences are by such seminal artists as Warren MacKenzie, Gertrude and Otto Natzler, Ken Ferguson and Paul Soldner. The collection also includes important ceramic works by American innovators Peter Voulkos, Rudy Autio, Beatrice Wood, Robert Arneson and Howard Kottler. Recent developments in ceramic sculpture are outlined by works by Michael Lucero, James Makins, Viola Frey, Betty Woodman, Adrian Sax and Ralph Baccera. In addition to the American ceramics collection, the Everson houses study collections of ceramics from around the world, numbering around 1,500 pieces. These range in date from a Chinese funerary urn from 3000 BC to contemporary examples of European and Japanese ceramic art. We invite you to visit the Syracuse China Center for the Study of American Ceramics Collection of the Everson Museum of Art to learn more about this collection.

Sculpture

The Everson's sculpture collection comprises over 200 works primarily of the 20th century. It includes pieces by many notable artists, including: Alexander Archipenko, Beverly Pepper, Leila Katzen, Ernest Trova, John DeAndrea, Claus Oldenberg, George Segal, Michael Tracy, Sol Lewitt, and Mary Frank.

Video

Art videos emerged as an art genre during the late 1960s and 1970s, at which time the Everson avidly began a video collection. Today, the museum maintains one of the earliest and most comprehensive collections of art videos of the period. The approximately 500 tapes include work by Nam June Paik, Mary Lucier, William Wegman and Bill Viola.

Photographs

A collection of 450 photographs provides an overview of developments in that medium over many years. A strong holding of images from the post-World War II era offers particular insight into photography during that time.

Works on Paper

Approximately 600 works on paper provide an overview of 19th and 20th century art movements. The works serve to parallel and amplify the American paintings collection.

Decorative Arts

As a former center of the American Arts and Crafts movement, the Everson houses a growing collection of decorative art objects. Now numbering close to 100 objects, the collection consists primarily of furniture, with items made by Gustav Stickley and other area artisans and firms active in the production of Arts and Crafts artifacts.

III. COLLECTIONS ADMINISTRATION: THE COLLECTIONS COMMITTEE:

Pursuant to its bylaws, the Everson Museum of Art has established a Collections Committee (known as the Acquisitions & Exhibitions Committee prior to 2010). This Committee is made up of members of the Board of Trustees as well as knowledgeable and interested members of the community (non-Trustees). The Chair of the committee will be a member of the Board of Trustees and the Chair will present the Committees findings and recommendations to their fellow Trustees at the monthly Board Meeting. All members of this committee are assigned by the President of the Board of Trustees. Prospective Committee members may be proposed by the Executive Director, Senior Curator or existing Committee members. The Executive Director shall bring these names to the attention of the President of the Board of Trustees, who shall appoint them to the Committee. Committee members and the Chair are appointed to one year terms, which are renewable by the Board's President.

The Collections Committee meets on a quarterly basis (four times per fiscal year). Votes/recommendations to the Board carry by a simple majority of the members present. No members may vote by proxy. However at the discretion of the staff in communication with the Chair, the Committee may be polled for votes via e-mail or phone for time sensitive decisions that fall outside the quarterly meeting schedule.

IV. ACQUISITIONS

We welcome significant gifts that add to the scope and dimension of the collection and support the museums mission, especially those gifts that create a critical mass, generate intellectual, aesthetic and cultural discussions that facilitates breaking down of cultural barriers. Gifts are encouraged in all areas in which the Museum collects. Aesthetic quality is always the criteria as well as how well the object (gift) fills a certain gap in the collections. In every case, the Executive Director and/or Senior Curator must propose the acquisition of gifts, bequests, purchases, and exchanges to the Collections Committee of the Museum and their recommendation goes to the Board of Trustees whose vote determines acceptance or rejection of each object (see by-laws). The director considers recommendations of the curator, and together they make judgments as to proposing objects for the Collections Committee's approval.

A. Criteria:

The relevant criteria for all acquisitions include, but are not limited to:

- a) The object should be consistent and appropriate with the mission and collection goals of the Museum
- b) The object should be exceptional, have potential for exhibition and study.

- c) If the object is offered as a purchase from the Acquisitions Fund, confirm that the price is a fair market value or if there might be a comparable object be obtained by gift or bequest.
- d) The Museum staff should be able to properly care for the object, and the cost of conservation, preventative maintenance, storage, exhibition, documentation, or transport should not override the intrinsic value of the object.
- e) Care should be taken in the accessioning process that all necessary documents which serve as proof of transfer of title, such as a signed Deed of Gift or original bill of sale are legitimate and in hand.
- f) The object must have an established provenance. The Museum must adhere to all guidelines governing national and international transfer of ownership of cultural property.
- g) The object should not be encumbered with conditions imposed by the donor (as distinguished from those covered in “h”) regarding use or future disposition. As a rule, only unrestricted objects are accepted and the Museum policy specifies that only a vote of the Board of Trustees can approve deviations from this rule.
- h) The object should be free of restraining intellectual property or title rights (copyright, patent, trademark or trade secret), or it should be possible for satisfactory resolution of any copyright or trademark issues or other restrictions or conditions to be effected
- i) It should be considered if the acceptance of the object will, in all probability, result in major future expenditures for the Museum --conservation, maintenance because it opens a new area of collecting.
- j) Recognizing that the primary role and responsibility of the Museum is to care for, preserve and share the art work it acquires, the Museum must weigh the physical condition of potential acquisitions against their potential artistic importance. Therefore, unless it is clearly crucial to the Museum’s collecting goals and mission, the Museum should not accept works in poor physical condition.
- k) If an object in need of conservation is deemed important enough to pursue acquiring it for the collection, the cost of conservation and restoration must be assessed in advance of the Collections Committee vote. In addition a plan must be presented for when the conservation will take place and how it will be paid for.
- l) In the event the Museum is considering the acquisition of a work of art with special handling needs or of an ephemeral nature, the intent of the artist must be maintained. While the Museum would endeavor to make the work last as long as possible, no conservation measures should be undertaken that run counter to the artist’s original intent. In addition, there should be a plan in place prior to the final acquisition that outlines handling procedures for the object in its anticipated stages of deterioration as well as defines what constitutes the final stage in the object’s life and how it will be disposed.

- m) Staff members may not accept personal gifts of art from donors as this would be a conflict of interest between what is best for the Museum's acquisitions and a staff member's personal gain.
- n) The Museum may not refer donors to specific appraisers, nor shall the staff, Trustees or Committee members offer a potential donor an appraisal for any object. As the recipient of the gift, the objectivity of the Museum's appraisal is open to question. The Museum will provide donors with the contact information for the Appraisers Association of America, where they will receive objective advice on choosing a professional art appraiser.
- o) NAGPRA compliance: The Museum will comply with NAGPRA. The Museum recognizes that some artworks in the collection, while not covered under NAGPRA, have cultural significance to Indigenous peoples and as such, will strive to maintain a working relationship with the Haudenosaunee Confederacy to help insure that all works in the collection with Indigenous origins are handled properly.

If the Museum is offered a gift of a Haudenosaunee Medicine Mask or other object that falls under NAGPRA regulations, they will not accept the gift into the collection and will inform the donor of NAGPRA law and of The Grand Council of the Haudenosaunee policy regarding all Haudenosaunee Medicine Masks (see Addendum A). The Museum will encourage the donor to contact the Onondaga Nation's representative for Haudenosaunee Confederacy Grand Council NAGPRA actions (currently [REDACTED]) to arrange to return the works to the appropriate Nation. The Museum may take custody of the works with the understanding that collections staff will immediately be in touch with the Onondaga Nation regarding repatriation.

As a general rule, an object should not be accepted unless it is destined for a specific collection. Exceptions to this rule should be rare and should be granted only after careful consideration, which includes satisfactory arrangements for dispositions of unwanted objects. For example, it may be necessary and prudent to accept an entire collection even though a few objects in the collection are not of museum quality and will not be added to the collections.

B. Accessioning and Collections Records

After fulfilling the criteria previously described, the procedure by which artworks are accessioned and recorded by the Everson Museum of Art is according to the following framework:

- a) The registrar, will note those objects recommended by the committee and approved by the Board for inclusion in the permanent collection.
- b) The registrar's office will assign unique permanent collection numbers to the collection objects by the year in which the object is acquired, numerical sequence of the collection group within said year, and part or suite number where necessary.

- c) The objects will be measured and described by the registration department, taking into account information provided by the curator and entered onto an accession form. Hard copies of all Database accessions records for each year will be kept in chronological order in a binder separate from the collection files and electronic database.
- d) A photographic record of collection objects will be maintained in the Collections Database for reference purposes. Professional images for publication will be arranged for and maintained by the Registrar as designated by the Executive Director and Curator.
- e) In the case of gifts, the Museum will endeavor to advise donors of regulations regarding non-cash charitable contributions and will comply with IRS regulations by maintaining a file copy of the donor's form 8283 and relevant appraisal when applicable.
- f) The donor of a work of art will be notified of the gift offer's acceptance by the Board of Trustees by means of a letter of acceptance from the Senior Curator, including form 8283 when necessary and a Deed of Gift form which will be countersigned by the donor and returned to the Museum, thereby transferring title to the Museum.
- g) The Museum will not provide donors of works of art with an appraisal for any gift offer due to possible conflict of interest. Nor will the Museum recommend or endorse any appraisers to donors or the public in general. All inquires will be referred to the Appraisers Association of America.
- h) The Registrar's office will maintain a donor file regarding gifts of works of art which includes copies of gift letters of offer and acceptance, IRS forms, appraisals, and general documentation of the Museum's ownership of each object in its custody as completely as possible.
- i) All records relating to collection objects, provenance, exhibition and loan history, conservation, location, rights and reproduction will remain secured in the registrar's office. Access to these will be strictly controlled by the director, registrar and curatorial staff. A current set of duplicate records will be maintained off-site for security purposes.
- j) Records of collection objects pertaining to scholarly use and curatorial information will be maintained by the curatorial office, registrar's office and Ceramic National Archives.
- k) Records of collection objects will be maintained according to the permanent collection number both on paper and electronically. Paper records will be kept in alphabetical order by artist's name. In the instances where the artist is unknown or not assigned, these files will be filed in numerical sequence by their permanent collection number. The electronic database will maintain records in a manner that can be cross-referenced by numerical sequence, artist's name, nationality, medium and donor.

- l) Objects will be recorded at their appraised or purchase value at the time of acquisition, when available. When not available, an internal valuation will be determined by appropriate staff for annual ledger and insurance purposes. These will be updated by selected periodic appraisals at the discretion of the director and curator.

C. Gift Categories (defined)

- a) Gift: any in-kind donation by an individual or organization is categorized as a "Gift". To make a valid gift, there must be clear intention on the part of the donor to transfer title to the Museum and the Museum must also have possession of property. It is essential that the transfer of both possession and title are absolute and shall go into immediate effect. After a work of art is accepted by the Museum Trustees, the donor is required to sign and return a Deed of Gift, which commits them to the above.
- b) Partial Gift / Promised Gift: A donor may give part of a work and promise to give the remainder of the work at a later time. This type of gift must be carefully reviewed by the Curator, Director, and Collections Committee to be certain the arrangement is beneficial to the Museum. Once accepted, the donor must sign a Partial Gift/Promised Gift Agreement which will outline an end date in which the Museum will take full title. (It is understood that the end date could be listed as an event, such as the death of the donor). In accordance with IRS rules, if the donor is taking a tax deduction for the portion gifted to the museum, the museum must be in possession of the object for a certain percentage of time that year. For example if the museum is gifted 25% interest in an object, the museum must take possession for at least 25% of the year or 3 months.
- c) Promised Gifts: A donor may make a Promised Gift to the Museum. Promised gifts are to go through the same approval process as regular gifts. If the work is accepted, the donor will be required to sign a Promised Gift Form, which will outline the date in which the object will be gifted to the museum (as noted above, the gift could be triggered by an event such as death of the donor). Legally the donor may retain possession of the work until the gift is complete or allow the Museum to retain custody of the work from the time the Promised Gift Form is signed. However the environmental conditions and security of the donor's home or the place where the object will be stored (if not at the Museum) must be taken into consideration when deciding to enter into a Promised Gift Agreement as there could be significant conservation concerns about the object by the time the title is transferred to the Museum.
- d) Objects of Unrelated Use: On rare occasion, the museum may take possession of an object from a donor that is considered not appropriate for the collection. In this situation, it must be documented in writing that the object is being accepted as "unrelated use" and this will significantly affect the percentage of allowable deductions based on IRS rules. This is intended to allow members of the community the opportunity to participate in the advancement of the Museum's collection who would not have the means to do so otherwise. Proceeds from the sale of such gifts will be restricted to the purchase of art. When accepting a gift like this, the museum must consider all costs involved including potential storage issues, appraisal fees, staff time, etc, to determine if accepting the object, even as unrelated use, is of benefit to the Museum.

V. DEACCESSIONING

Deaccessioning is a normal and ongoing part of the growth, refinement and improvement of the Everson Museum's collection pursuant to its collecting priorities as reflected in the Collecting Priorities Plan. The Collection Management Policy incorporates guidelines and philosophies established by the American Alliance of Museums.

It is understood that deaccessioning itself is a process and through these policies and procedures, the Everson Museum seeks to ensure that the integrity and character of its collection and its contribution to the museum's mission, as a whole, is maintained.

The Everson's professional staff possesses the expertise, scholarship, and judgment required for accessioning works to the collection, and they will undertake deaccessioning with the same high standards. In the event that additional expertise is necessary to make the most beneficial decision for the Everson, a recognized outside expert(s), with no personal interest in the objects in question may be consulted.

A. Definitions

Accessioning means: (a) adding an object to the Everson's collection or (b) the act of recording/processing an addition to the Everson's collection.

Deaccessioning is defined as the process by which the Everson, acting in accordance with the policies and procedures it has adopted, approves the removal of a work of art or other object from its collection.

Disposal is defined as the method by which physical removal from the Everson's building or collection is accomplished. Disposal methods may include sale, trade, gift (to public institution) or destruction.

B. Criteria for Deaccessioning

An object considered for deaccessioning must meet one or more of the following criteria set forth by the New York State Board of Regents 8 CRR-NY 3.27:

1. the item is inconsistent with the mission of the institution as set forth in its mission statement and scope of collections;
2. the item has failed to retain its identity;
3. the item is redundant;
4. the item's preservation or conservation needs are beyond the capacity of the institution to provide;
5. the item is deaccessioned to accomplish refinement of the Everson's collections;
6. it has been established that the item is inauthentic;
7. the institution is repatriating the item or returning the item to its original owner;

8. the institution is returning the item to the donor, or the donor's heirs or assigns, to fulfill donor restrictions relating to the item which the institution is no longer able to meet;
9. the item presents a hazard to people or other collection items; or
10. the item has been lost or stolen and has not been recovered.

C. Use of Proceeds

Pursuant to the Collecting Priorities Plan, the funds received from the sale of deaccessioned works of art will be deposited in the Everson's Deaccessioned Art Fund and used to improve the collection through accessioning new works (including the costs associated with new acquisitions) and to provide for the direct care of the collection.

The Everson Museum considers direct care of its collection to be any investment or expenditure that enhances the life, usefulness, or quality of its collection objects. Investments or expenditures that ensure the longevity of the Museum's collection and thereby ensure that the objects will continue to be available to and benefit the public for many years to come are considered direct care of the collection. Direct care of the collection may include any of the following:

1. Direct costs of daily care, research, and conservation: supplies; equipment; salary and benefits for staff (who may include curators, registrars, conservators, and preparators); cost of contract conservator when necessary; and costs for shipping to/from contract conservator's lab or between the Everson and off-site storage for examination or storage.
2. Direct costs of deaccessioning: The Everson recognizes that deaccessions are a necessary part of collection care. Costs related to a deaccession project such as curatorial and registrarial salaries and benefits; additional temporary staffing (for instance, for purposes of object research and project management); expenditures involved with inspection of objects at off-site storage facilities; and with shipping and crating are considered necessary expenses for the direct care of the collection.
3. Direct costs of storage: The Everson has storage vaults on its premises and also stores works off-site at a fine arts climate-controlled warehouse. The Everson considers the cost of off-site storage a necessary expense to ensure the longevity of its collection.

Procedure for determining uses of funds

Any extraordinary use of funds for direct care of the collection will be recommended by the Everson's Director and submitted to the Board of Trustees for final approval.

D. Disposal Methods and Notifications

Acceptable methods of disposal include:

1. Disposal may be by exchange, donation or sale.
2. Scholarly or cultural organizations will be preferred recipients unless doing so would result in the Everson receiving less than fair market value, rather than private individuals or commercial entities. Local or national interests will be weighed in deciding on the recipient of donation or exchange.
3. If disposal is to be by sale, consideration will be given to whether public auction or private sale will best balance the interests of the Everson in ensuring the highest price for the object and ensuring an “arm’s length” transaction.
4. If deemed appropriate, the object may be designated for educational, “hands-on” use within the Museum (given to the Education Department), or donated to another educational organization for such a purpose.
5. In rare situations, it may be deemed that the most appropriate means of disposal is to destroy a work if it has deteriorated to such a point or the object is made of hazardous materials that the museum cannot properly care for or store safely.
6. The type and value of the object under consideration may dictate additional precautions such as the need for outside appraisal(s).

The Director of the Everson shall (a) as a courtesy, notify a donor who is still living of the Everson’s intent to deaccession the item; and (b) in compliance with Internal Revenue Service regulations, notify the donor and the IRS if donated items are disposed of within two years of donation.

D. Deaccession Records

Subsequent to fulfilling the criteria described previously for the deaccessioning of works of art from the permanent collection, the following procedures for deaccession will be employed:

1. Deaccessioned objects will be recorded in the museum database and all paperwork documenting the process and approval for the deaccession of the object will be kept in the object’s permanent file.
2. Works of art purchased with funds from deaccessioning will be publicly credited to the original donor(s) in a similar manner as follows “Gift of [donor’s original credit] by exchange” or “Through prior gift of [donor’s original credit]” or “[fund name] by exchange.” For works of art originally purchased using unrestricted art purchase funds, the funds from deaccessioning will be deposited in the Deaccessioned Art Fund.

3. Deaccession forms will be added to the object and donor files, recording the object's description, date of deaccession and recorded value and method of disposition.

VI. LOANS

It is understood that the exchange of cultural objects between collecting institutions is a vital part of the Museum's exhibition programming. It allows the Museum to bring objects to its audience that they might not have had the chance to see and present them in a context that relates to the Museum's collections or the community.

A. Loan procedures (both incoming and outgoing) - The following matters will be considered:

- a) Loans from the EMA collections will be made for educational purposes to other educational organizations with approved AAM Facilities Report and meet adequate security and climate controlled conditions.
- b) The Collections Committee has the authority to approve all outgoing loans. The director has the authority to approve all incoming loans.
- c) Items will not be loaned or taken in on loan if it is doubtful that they can withstand travel, climate changes, and the circumstances of the exhibition.
- d) In order to insure proper accounting for both incoming and outgoing loans, all loan transactions are for specified periods of time, if feasible (with options for renewal).
- e) The Museum currently has a group of "old loans" that have been in possession of the museum for in some cases up to 30 years. The Museum will follow all rules and guidelines set forth in the NY State Law "Museum Property" law, Section 233-aa of NYS Education Law when trying to locate lenders or next of kin. The guidelines of this law will be followed whether it is the museum's intent to return the object to the lender, request that it be offered to the museum as a gift or when attempts to contact the lender fail, to take action to claim full title.

B. Incoming Loans

After fulfilling the criteria previously described for loans and the recommended approval of the Collections Committee in the case of outgoing loans, the following procedures for loans will apply:

- a) Objects received for loan to the Museum for reasons of acquisition, study or research, extended loan or exhibition, will receive the same care and safekeeping that is afforded the Museum's own collection.
- b) Loans to the Museum will be returned only to the owner or his/her authorized agent identified in writing.

- c) Loans to the Museum will be insured by the Museum's "wall-to-wall" fine arts insurance policy at the valuation requested by the lender against all usual risks, unless other arrangements are requested by the lender. When valuation is not given, objects will be insured at a value assigned by Museum staff.
- d) If the lender elects to maintain his own insurance coverage for the loan, the Museum may request a Certificate of Insurance naming the Museum as co-insured or a waiver of subrogation against the Museum.
- e) Unless notified to the contrary, the Museum reserves the right to photograph and reproduce objects lent for exhibition, in educational publications, and for publicity purposes.
- f) Exhibition or extended loans to the Museum will be recorded on a loan agreement form describing specific terms of the loan, signed by the lender and agreed to by both parties, or on a loan receipt form in any case upon receipt of the loan. Both the Museum and lender will maintain and receive copies of the proper form.
- g) Files for objects lent for extended loan or study will be recorded in a specific loan files that are separate from the general collection files. Unique numbers will be assigned to all extended loans that will be in the reverse format of permanent collection accession numbers; (ie, transaction number followed by year loan was received/accepted) and will contain the pre-fix E.L. In addition to paper files, these loans will be recorded in the collections data base.
- h) Extended Loans will be monitored by the registrar's office and are to be accounted for in regular inventories of the collection.
- i) The Museum will assume all costs relating to insuring, packing, shipping, loan fees and security of all loans to the Museum unless other arrangements are agreed to by the Museum and lender.
- j) In the case of outgoing loans from the Museum, the borrower will be responsible for the cost and arrangement of those subjects listed in item "i" unless other arrangements are agreed to by Museum and borrower.
- k) In case of outgoing loans, the Museum may request of the lender a facilities report of any institution in which the lent objects may be housed.
- l) Each collection object lent or borrowed must be given special attention and care to insure against loss, damage or deterioration and should remain in the condition received and may not be unframed, cleaned, repaired or in any way altered except by the express permission of the Museum or lender.
- m) If loss, damage or deterioration is noted by the Museum or borrower, the registrar of Everson Museum of Art or the lender is to be advised of the damage in detail within 24 hours of occurrence. In the case of objects borrowed by the Museum, the registrar will subsequently notify the director and will pursue an investigation and any necessary insurance claim.

- n) Objects lent by the Museum may not be photographed for reproduction without express permission of the Museum or copyright owner, except for educational or publicity purposes.
- o) The borrower of collection objects will insure them against all risks of physical damage while in transit and in his/her possession for the value assigned unless prior arrangements have been agreed to by the Museum.
- p) The borrower of collection objects will be responsible for packing and shipping objects in the same manner as received or as agreed to by the registrar of Everson Museum of Art.
- q) Objects lent by the Museum will be recorded on a release of objects form which will be signed by the registrar or staff member and delivered to the borrower who will sign and return the form to the registrar in order to acknowledge receipt of loan. Documentation of the loan and related correspondence will be maintained in an outgoing loan file until the loan is complete and returned to the museum. After the loan has been completed, pertinent info will be pulled from the outgoing loan file and placed in the object file. Pertinent information about the loan will be noted in the database including the object's exhibition history.
- r) In order to account for all works of art entering and exiting the Museum, incoming and return object receipts will be used to account for all incoming loans or solicited objects. This includes all works of art brought into the building for use in for Museum exhibitions, Education Department programming or fundraising events.
- s) The Museum may impose a loan fee of \$200.00 for the first object and \$100 for each additional object lent in order to defray costs of packing and handling outgoing loans.

C. Deposited Objects

- a) Objects whose source is unknown will receive the same care and attention as described for collection objects and will be assigned a temporary number (TN) in a simple numerical sequence and recorded in the same manner as collection objects.
- b) Objects which are deposited on Museum premises which are unsolicited and are not classified as loans for exhibition, acquisition, extended loan, study or research will, in accordance with NYS "Museum Property" law, Section 233-aa of NYS Education Law, be maintained by the Museum with the same care given to its own collection for the period of 90 days from date of deposit. If the owner/depositor does not return to the museum to claim the object before the end of the 90 day period, the Museum will assume full title of the work and either accession the object into the collection via the normal acquisition process or dispose of it as the Curatorial Staff deems fit.
- c) The owner of deposited objects will be responsible for maintaining his/her own insurance policy on said objects. Everson Museum of Art will not be responsible

for any damage or loss which may occur to these objects while on Museum premises or in transit to or from Museum.

D. Receiving Objects for Reasons Other than Exhibition

Works of art enter the museum for a number of reasons other than for loan to a temporary exhibition or as an offer of gift. To that end, this section of the Collection Management Policy is meant to provide guidelines for all museum Staff who may need to deal with these situations in their programming or events. It is imperative that these objects are properly accounted for and the risk to the Museum is minimized. Under no circumstances should any party be allowed to drop-off art work without a properly signed receipt. Under no circumstances should a museum Staff member accept the delivery of art work without knowing exactly why the work is coming into the building and which department is responsible for it. Listed are the most common ways works of art enter the building and the procedure that should be followed by Museum Staff:

- a) **Art work brought in by Museum Staff:** Personal works of art (whether made by them or owned by the staff member), may be brought in for use in their personal office space only. Personal works of art are brought into the museum at the Staff Member's own risk and the museum will not be held responsible for damage or loss of any kind. It is the staff member's responsibility to notify the Registrar that they are bringing in an object. The Registrar will have the staff member sign a Hold Harmless Agreement and attach a photograph of the work to the form, which will be kept in a file in the Registrar's office. All such objects must be clearly marked as to the owner of the object. If the object will be affixed to a wall or anchored to the floor in some way, the method must be approved in advance by the Facilities Manager.
- b) **Art work brought in for demonstration:** Art works brought by an artist or lecturer may be used to augment a workshop, class, lecture or program. The Staff member organizing the program is responsible for having the owner of the work(s) sign Incoming and Outgoing Receipts. Having these works remain in the building over night or for any extended period is strongly discouraged. However, if the need does arise (i.e. multiple-day workshop), if at all possible, the work(s) should be stored in the organizing Staff Member's office and the object must be clearly marked as to who the owner is and the object's purpose for being in the building. This can be easily done by attaching a copy of the Incoming Receipt to the object.
- c) **Art work brought in for Fundraiser:** Art works that are donated to the museum as part of a fundraiser should be signed for with the same Incoming receipts as noted above. It must be clear between the organizer of the fundraiser and the donor whether the object is an outright gift (the museum keeps it whether it sells at the fundraiser or not) or must be returned to the donor if it does not sell. This info should be specified in the Incoming receipt. There may be a time where an object of significant value or from a very well known artist is donated or lent for a fundraiser, where it is appropriate or required that the museum provide insurance coverage of these objects. This type of situation will be looked at on a case by case basis and must be approved by the Director. In the event that the Director deems that the museum shall provide insurance, the Registrar must be notified in writing with the specific information about the object including the lender/owner's

name, address and the value of the object. The Registrar will obtain a certificate of insurance from the Museum's insurance carrier.

- d) **Art work brought in for non-professional or community exhibitions:** Due to the lack of sales history or the ability to obtain a true replacement cost/value for works of art by amateur, student and some emerging artist, these objects will not be covered by the Museum's insurance policy. While the museum staff is required to handle all objects as if they were part collection, it must be made clear that these works will be shown at the museum at the artist/owner's own risk. These works must be accounted for by the staff person or department organizing the exhibition. Each object or group of objects must be accounted for with incoming and outgoing receipts. These objects are to be clearly marked as to who owns the object, their contact info and why the object is in the building. Under no circumstances should these objects be stored in the Collections Storage Rooms. If you have concerns about the values of an object or are working with an artist that you feel may warrant the Museum to provide insurance, you must notify the Registrar in writing prior to the object arriving to the building. In consultation with the Director and Curator, it will be decided whether the Museum will take on the risk of insuring these works. It must be understood that if the Museum provides insurance, there may be additional security requirements such as additional guard staffing, fabrication of pedestals or vitrines, etc. With the exception of guard staffing, any additional costs for security requirements are to be born by the department sponsoring the exhibition

VII. INVENTORIES

In order to monitor collections activities, inventory of the permanent collection will be conducted in the following manner:

- a) Collection objects will be periodically inventoried on site, in storage, and on display by the registrar's office during the summer months by collection (i.e. medium) each year, as possible.
- b) Permanent collection numbers will be noted on an inventory form and checked against the database and permanent records. Any discrepancies will be adjusted and noted in the records. Copies of the inventory form will be filed in the registrar's office and off-site storage for security purposes.
- c) A comprehensive collections inventory will be undertaken at ten year intervals according to the above format, beginning in 1983, as circumstances allow.
- d) Annual inventories of smaller sections of the collection will take place on a rotating basis. These will be categorized by location or by medium (i.e. paintings or ceramic study center).
- e) In the event that a collection object appears to be missing, it will be reported immediately to the registrar and the director who will, in turn, notify the proper authorities and pursue any insurance claims as deemed necessary. If the loss has been deemed a theft, procedures will be followed in as outlined in the Crisis Management Plan.

VIII. CARE OF COLLECTIONS

Museum staff are to remain current in their understanding of their responsibilities to preserve and protect collection objects from risk of any sort.

- a) Only staff qualified to handle art are permitted to do so. This includes the director, curator and preparation staffs. The guidelines established in the American Association of Museum's *Museum Registration Methods* handbook for handling art will be followed as closely as possible.
- b) The galleries and storage facilities of the Museum will be protected by security patrols during public Museum hours and by selected object alarms in order to prevent theft or vandalism of collection objects. In addition, individual art storage rooms are secured by a 24-hour alarms which requires a key as well as individual disarming code to gain access to these areas. Motion detectors and central station security alarms will be activated by the superintendent, security supervisor or ranking security personnel at the close of each day and monitored by an outside agency. Museum grounds will be patrolled by Syracuse Police during off hours.
- c) In the event of theft or damage, security will notify the director and registrar immediately, who will in turn notify the proper authorities as necessary and pursue any investigation or insurance claim.
- d) In the event of natural disaster, Museum personnel will cooperate fully with civil authorities and will not risk personal safety. Preventative measures and procedures as outlined in the Museum's Emergency Preparedness plan will be taken in order to protect the collection from such risk by maintaining the structural integrity of the Museum facilities. All care will be taken to prevent further damage during clean up procedures subsequent to a natural disaster.
- e) The Museum will maintain smoke and fire detectors in all Museum facilities connected to and monitored by an outside agency under the supervision of the building superintendent and will maintain hand-held fire extinguishers and unobstructed entrances in accordance with civil fire codes in order to protect against risk from fire.
- f) Smoking is not allowed in any area of the building including the galleries and storage areas of the Museum under any circumstances.
- g) Conservation needs will be monitored by the Curatorial Staff, Registrar and Director. Condition reports on collection objects will be periodically completed by registration or curatorial staff and will be completed on incoming and outgoing loans in all cases.
- h) Conservation treatments will be prioritized by the Director or appropriate Curator and implemented by the Registrar according to the availability of funds and the established priority. Conservators employed by the Museum must adhere to the standards established by the American Institute for Conservation of Historic and Artistic Works (A.I.C.).
- i) The Registrar's office and preparation staff under supervision of the Registrar will be responsible for packing and shipping of collection objects and loans and will

employ only professional packers and shippers familiar with the delicate nature of art works.

- j) Objects being couriered by Museum staff will be protected in accordance with standards set by the Registrar's Committee of the American Association of Museum's "A Code of Practice for Couriering Museum Objects" (June 1986).
- k) Collection objects will not be removed from their assigned place in storage without authorization of the Director, Curator or Registrar. Objects removed from storage will be noted in the collections database. An inventory card will be placed in place of objects removed from display by Museum staff.
- l) Storage facilities will remain locked and armed at all times and access will be limited to the designated staff with key and alarm code access. Visiting scholars and maintenance contractors are permitted access only by authority and under supervision of the aforementioned staff.
- m) Storage facilities will be organized and constructed so as to maximize safety and preservation of collection objects in accordance with accepted standards of conservation. Air conditioning through the Museum facility will be filtered to remove particulates and gasses to the degree possible and the Museum will endeavor to maintain a temperature as close to 70 degrees Fahrenheit +/-5 degrees within a 24-hour period and a relative humidity of 50% in the spring, summer & fall and 40 - 50% in the winter, +/-5% within a 24-hour period.
- n) Copies of collection-related material will be made available to institutions, scholars, and researchers through the Curator's or Registrar's office. These are not available to the general public except through the Director, Curator, or Registrar. In no case are records relating to objects' valuation or donation made available except, in the case of an object being lent (for insurance purposes). These files are kept in the Registrar's office are to be signed out of the office with permission. Under no circumstances should these files be allowed to leave the museum premises.

IX. INSURANCE

The Museum will insure all collection objects under a "wall-to-wall" fine arts insurance policy in order to protect against loss and to assure the continuity and integrity of its collection.

- a) As the cost of insuring the collection for its full market value is prohibitive, the Museum will insure the collection for a value determined to be the maximum loss probable in one incident, or approximately 15% of the full collection value, as determined by the Director, and Registrar and approved by the Board of Trustees and Budget Committee.
- b) All loans to the Museum for purposes of acquisition, study or research will be insured for their full value against all usual risk under the Museum's wall-to-wall fine arts policy as described in the "Loans" section of this document, unless other arrangements are agreed to by the lender and the Museum.
- c) All loans from the Museum for purposes of exhibition, study or research or extended loan will be insured against all usual risk by the borrower's wall-to-wall

fine arts insurance policy while in custody of the borrower, unless other arrangements have been agreed to by the Museum and the borrower.

- d) Due to the lack of sales history and difficulty of obtaining a fair market value, artwork brought into the museum for “community” exhibitions or artwork done by non-professional or emerging artists will not be insured by the Museum. This fact will be made clear to all lenders, artists, etc on object receipts and loan agreements
- e) Collection objects undergoing conservation treatment will be insured under the Museum’s fine arts insurance policy and subrogation against the conservator waived upon request of the vendor/contractor.
- f) Objects deposited at the Museum, as described in the “Deposited Objects” section of this document will not be insured by the Museum fine arts insurance policy and the Museum will not be liable for any damage or loss which may occur to these objects while on Museum premises or in transit to or from the Museum.
- g) The Registrar will be responsible for maintaining the records relating to the fine arts insurance policy and endorsements and claims and for its implementation under the supervision of the Director.
- h) Authority to approve deviation from general insurance policy is restricted to recommendation from the Registrar and approval from the Director and/or the Board of Trustees.