

COLLECTIONS MANAGEMENT

AT THE POSTAL HISTORY FOUNDATION

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POSTAL HISTORY FOUNDATION | 920 N 1ST AVE TUCSON AZ 85719

INTRODUCTION

The Postal History Foundation connects people to postal history, philately, and the world of stamps to inspire curiosity and encourage the enjoyment of life-long learning.

The Foundation was born in 1960 as “The Western Postal History Museum” and was associated with the Arizona Historical Society. The dual purpose was to educate youth and to collect and preserve the postal history of thirteen western states. By 1993, the focus had shifted away from exclusively western United States postal history and toward world-wide philately. The name was changed to the Postal History Foundation. The library’s holdings expanded to world-wide resources.

In 2008, the Foundation, for the first time, employed a professional librarian who supervised the cataloging and shelving of the books and the accession of archival collections, some of which were acquired during the period of the focus on western postal history, while others were of personal interest to contemporaneous volunteers. In 2013, the second librarian with the library committee created collection management policies for the library and the archives. While the library’s holdings retained their world-wide scope, the archives’ scope was narrowed, with preference given to Arizona postal history and to official United States Postal Service publications and artifacts. Not all of the archival collections are appropriate for the scope that was created retroactively.

Until this document, created in 2019, no collection plan or collection management policies outside of the library and archives existed for any other items owned by the Postal History Foundation. What was donated was generally accepted. No objects outside of the library and archives have been cataloged or given adequate housing with an eye toward preservation. This document will hopefully guide the Foundation to be better custodians of their holdings and deserving of the public trust.

At the time of writing, the Foundation has not developed a Museum program. This document places a “Museum Collection Manager” in charge of the Museum Collection. Until the Museum program is developed, the Director of Library and Archives is the Museum Collection Manager.

This document contains the policies governing collections and is meant to be brief so as to promote clarity. The procedures to carry out the policy, as well as the rationale behind the policy, are found in the Museum Collection Manual.

COLLECTION TYPES

The Postal History Foundation holds six types of collections:

Library Collection

The Library Collection has three major collecting areas: philately and postal history, comprising the bulk of the collection; general history, particularly Arizona and the Western United States; and the Civil War. The library actively collects philatelic materials and primarily receives Arizona history and Civil War materials as donations. The Library Collection is housed in both open and closed stacks and most are kept in temperature-controlled conditions. The Library Collection is under the supervision of the Library and Archives Director. The Library and Archives Director may also designate a representative to complete tasks.

Archives Collection

The Archives Collection includes original manuscripts, special collections, exhibits, postcards, photographs and maps pertaining to postal history, philately, the U.S. Civil War, and the history of the Postal History Foundation. These papers and records are accessioned and are housed in closed stacks using archival materials and temperature conditions. They are secured by at least one locked door and may also be secured again in locked cabinets. Each collection has a finding aid and is cataloged. The Archives Collection is under the supervision of the Library and Archives Director. The Library and Archives Director may also designate a representative to complete tasks.

Museum Collection

In most museums, this collection is known as the “permanent collection.” Because the Foundation is a small organization, and because it holds other collections that are also considered permanent, the term Museum Collection is used. The Museum Collection includes objects used in the business of sending and delivering mail, including used in the post office, and including some office supplies not exclusive to post offices. Objects related to philately and stamp collecting are also found in the collection. Special consideration is given for objects that were created by the United States Postal Service (or Post Office Department) and for objects that were used in Arizona. These objects are accessioned, cataloged, and meant to be preserved. When not on display, they are housed near the archival collections as described above. The Museum Collection is under the supervision of the Museum Collection Manager. The Museum Collection Manager may also designate a representative to complete tasks.

Interactive Collection

The Interactive Collection also includes objects used in the business of sending and delivering mail, including used in the post office, and including some office supplies not exclusive to post offices. It also includes objects related to philately and stamp collecting. However, these objects are surplus; that is, priority is given to potentially accessioning such an object in the Museum Collection, and if the object is not needed or wanted in the Museum Collection, it may be placed in the Interactive Collection. Objects

here are inventoried, but not accessioned. They are meant to be touched and used by guests in order to help educate them. They are not kept for preservation, and may, in fact, become damaged or destroyed through use. When not in use, these objects are kept in clean, not archival, housing. The Interactive Collection is under the joint supervision of the Museum Collection Manager, the Library and Archives Director, and the Education Director. The Museum Collection Manager, the Library and Archives Director, and the Education Director may also designate a representative to complete tasks.

Display Enhancement Collection

The Display Enhancement Collection includes knick-knacks, decorations, etc. that do not fit into the museum or the education collections but their inclusion in exhibits would enhance the exhibits' appeal and educational value. These items are not accessioned. When not in use, these objects are kept in clean, not archival, housing. The Exhibit Prop Collection is under the joint supervision of the Museum Collection Manager, Library and Archives Director, and the Education Director. The Museum Collection Manager, the Library and Archives Director, and the Education Director may also designate a representative to complete tasks.

Education Collection

The Education Collection is managed by the Education Director. Formal collection management policies may be developed in the future. The Education Collection will not be addressed in this document.

Philatelic Collection

The permanent philatelic collection is in its early stages. It will not be addressed in this.

LIBRARY COLLECTION MANAGEMENT POLICY

Purpose

The reading materials in the Library Collection at the Postal History Foundation are held for public education and research purposes.

Scope

Content

The reading materials in the Library Collection at the Postal History Foundation must support the Foundation's mission by:

- Directly relating to philately and/or postal history.
- Support the research of philately and postal history with general and historical information pertaining to:
 - Arizona and the West
 - Specific areas of collecting (e.g. identification of naval ships, history of dirigibles, paper-making, etc.)
- Support the promise made by the Foundation to the Slussers to care for Peggy Slusser's Civil War collection

Format

Materials may be collected in all formats (print, electronic, audiovisual, etc.). The most appropriate format for library patrons should be prioritized.

Levels of collecting

Primary emphasis should be given to materials that directly support the mission and directly relate to philately and postal history. Secondary emphasis should be given to materials that support the research of philately and postal history with general and historical information. Civil War materials are not actively collected.

Development

- Purchase annually the current *Scotts Stamp Catalog*.
- Purchase every two years the *Scotts Classic Specialized Catalogue of the World (1840-1940)*.
- Maintain a collection of the most popular foreign catalogs that are no more than three years old.
- Obtain monographs on philatelic subjects that are significant nationally or to local patrons.
- In order to receive their periodicals, maintain our membership in state and national groups that are significant nationally or to local patrons, or for whom we have long back-files of these groups' periodicals.

Acquisition

How materials are acquired

Reading materials in the Library Collection may be acquired through purchase, gift, or transfer of custody. Primary consideration should be given to materials that are directly related to postal history and philately. **Materials pertaining to the Civil War are not actively collected nor sought after**, as they do not support the mission, and the only reason the Foundation holds them is the original promise to the Slusser family.

Who may acquire the materials

Because donations are often given as a large mixture of items such as stamps, albums, books, and postal and philatelic objects, anyone with authorization to accept such donations may acquire materials for the Library Collection. During this process, the donor must be made fully aware that donated items may or may not be kept.

Caveats acquiring materials for the Library Collection

- Large quantities of reading materials that would strain resources (space, employee work time, etc.) should not be accepted without first consulting the Library and Archives Director.
- Materials outside the active collecting scope should not be accepted.

Required documentation

- [Donation Intake/Deed of Gift Form](#), or
- Receipt of purchase

Please note that it is not necessary for the donor to sign a deed of gift for materials that will be placed in the Library Collection (they will not be accessioned). However, if the person accepting the donation is unsure, it is better to obtain the signature.

Selection

Who decides to select materials for the Library Collection

The Library and Archives Director determines if materials should be added to the holdings of the Library Collection.

Selection criteria

When making this decision, the following should be considered:

- How well does this material align with our mission?
- How well does this material fit the scope and the active collecting areas?
- Would it be useful to our primary users?
- Is the format appropriate for our users?
- How current is the material? Does it need to be current?
- Does the Foundation already have a newer or revised edition?

- Does the usefulness/alignment with mission justify the cost (if a purchase)?
- What condition are the materials in?
- Would the materials add value to the library's holdings?
- Does the Foundation currently have (and for the foreseeable future have) the resources to commit to cataloging and storing the materials (e.g. shelf space)?

Monographs and Descriptive Catalogs:

Retain only the most recent edition, unless it is generally accepted that previous versions are superior and should be kept instead, or unless it is generally accepted that previous versions should also be retained. If the latter, the Library and Archives director may consider photocopying pertinent sections of previous editions and discarding the previous volumes.

Periodicals:

Retain all issues (no duplicates). Maintain memberships in the most popular societies and organizations with the periodicals most used by library patrons. To conserve shelf space, the Library and Archives Director may consider electronic-only subscriptions for less-popular and less-used periodicals. The library should participate in as many in-kind journal subscriptions as other groups agree to (by sending them the Foundation's *Stamp Tracks* newsletter in exchange for their periodical). Only as a last resort for needed shelf space, the Library and Archives Director may consider weeding out paper periodical issues where permanent, full electronic access is available.

Maps:

Retain all iterations/editions of maps that directly or indirectly support the mission of the Foundation. Priority should be given to maps of postal routes in any geographic area, and Arizona maps of any sort. Should weeding become necessary (e.g. lack of space), maps with indirect ties to the mission should be weeded first. If maps are also available online (e.g. at the Library of Congress or USGS), those maps may also be considered for weeding.

Ephemera:

Ephemera files include newspaper clippings, photocopies of forms, photographs printed on regular paper, and other odds and ends. The Library and Archives Director must balance the resources available (e.g. volunteer support, storage space) with the volume of ephemera to be considered for retention. Items should not be kept that do not seem to fit the scope, are duplicate, or are not likely to help a researcher.

Auction Catalogs:

All auction catalogs that have yet to occur should be kept on display in the library. Following that, only particular auction catalogs are retained:

- “Name” auction catalogs (the auction of stamp material of a prominent stamp collector/philatelist, such as *The Margie Faiman collection of St. Louis Bear Postmaster Provisional Stamps*)
- “Name collection” auction catalogs (an auction of a collection of stamp material is known primarily by a specific name, rather than the name of the owner, such as the *Versailles Collection* sold by the Catholic Diocese of Las Cruces, New Mexico.
- Auction catalogs which prominently feature outstanding philatelic items; such as rare or scarce items not often seen at auction shall be retained.
- Auction catalogs that are particularly impressive in the scope and extent of the philatelic material being offered as well as the manner in which the material is presented shall be retained. This would include material that may not fit into any of the previous three categories, but is of such a nature (such as having outstanding photographs of the material being offered) that it is deemed worthy of retaining.

Additional information

Duplicates

The Slusser Library does not have the resources to hold duplicate copies of the same item, and with few exceptions, should not duplicate material. The Library and Archives Director may decide to keep duplicate copies, sparingly, if items are:

- Needed on the public reference shelf for continuous access
- Needed on “permanent checkout” in the sorting or sales area
- Desired in the librarian’s personal reference section for ease of access
- In very high demand or used very frequently by various patrons

Foreign language

Materials in foreign languages will be collected. If an English version exists, that version should be considered for selection to either supplement or replace the foreign language version, depending on available resources and use of materials. Large donations or long runs of materials in a foreign language, particularly one not commonly read by Slusser patrons or in a Romanized alphabet, should only be retained after careful thought. If it is decided not to retain the items, other philatelic libraries should be offered the collection when feasible. It is preferable that the recipient pay the shipping costs.

Required documentation:

Materials retained in the Library Collection are cataloged and require catalog records. Monographs, catalogs, and maps are cataloged at the item level. Periodicals are cataloged as serials. Ephemera are cataloged at folder level. Originally, catalog records were created and exported only to the Pima County Public Library (PCPL). Later, catalog records for items with philatelic subjects were created in

the American Philatelic Research Library's (APRL) union catalog. As large donations increased, a cataloging backlog occurred. Because the catalog records for PCPL are in MARC-21 format, and are therefore much more time-consuming to create, it was decided to create one catalog record at APRL for items with philatelic subjects and one catalog record at PCPL for items with non-philatelic subjects. If the cataloging backlog is worked through, it may be advisable to go back and create catalog records for items with philatelic subjects for PCPL. Procedures for cataloging are found in the manual, *Cataloging at the Slusser*.

Weeding

Weeding in the Library Collection is the permanent removal of reading material. Weeding in a library is so named because, like a garden, a library cannot be sustained if books are constantly added and nothing is removed. It would become bloated and difficult to use. Public libraries weed constantly. Special libraries, such as the Slusser Library, do not weed as often. It is often a last resort after all attempts to conserve shelf space have been made. The decision to weed should follow the best practices of professional associations such as the American Library Association or the Special Libraries Association.

Who weeds materials from the Library Collection

The Library and Archives Director determines if materials should be removed from the holdings of the Library Collection. When making this decision, the following should be considered:

- The materials do not fit the scope of the collection and probably never should have been retained in the first place.
- The materials' connection to the mission and relation to the scope is tenuous.
- The material supports the mission indirectly.
- The material has secondary value as an artifact from the Foundation's history (e.g. was written by or dedicated to a past member).
- The material can be found online (how readily, how accessible?).
- The library has a more recent or more informative edition.
- The material is known to have factual errors or would otherwise be unhelpful to patrons and contradict the mission.
- The Foundation does not have adequate resources (space, money for preservation, staff to care for, etc.) to properly care for the materials—even if they fit the scope.
- Other institutions have these materials and they are well-represented elsewhere.

Disposition of materials weeded from the Library Collection

Items that are weeded from the Library Collection should be disposed of by one of the methods below. None of them should be done in the presence of guests.

Sale

Selling the material to help support the Foundation is the preferred method of disposal. It should be given to the Sales Department, where they will determine the best way to sell it.

Free pile

If the material has little monetary value, it may not be worth the time to try and sell it. It may be placed in the “free pile.”

Recycling

If the material has little monetary value, and/or if it is in very poor condition, it may be recycled.

Loans

Outgoing Loans

What may be borrowed?

The Library is committed to making materials as accessible as possible but must also restrict some items from loan in order to keep them available for future patrons. The Library and Archives Director will determine which items are available for borrowing. When making this decision, the following should be considered:

- How often is this item requested by other patrons?
- How well will this item “travel”? (Size? Fragility? Weight?)
- How easily could this item be replaced if it should be damaged or lost? (Cost? Rarity?)

Periodicals, maps, ephemera, and items designated “rare” are generally not loaned.

Who may borrow?

Local Postal History Foundation (PHF) members in good standing may borrow items from the Slusser Library. Materials may be borrowed only when the Library and Archives Director or a designated representative is available and the borrower’s signature is obtained in the circulation ledger. While Slusser Library materials may not be borrowed by mail, selections under fair use may be photocopied and mailed to users.

Loan limits

5 items may be borrowed at one time.

Loan Time

Items are loaned for 1 month with the possibility of a further month’s extension at the discretion of the librarian. Items may be re-called during any loan period if another patron requests the same material. If an item is recalled, the new user will be informed and will have three days to pick up the material.

Late fees

No late fees will be charged, but borrowers who do not return books in a timely manner will have their PHF membership privileges suspended and their borrowing privileges revoked until all items on loan are returned.

Lost or damaged material

If an item is lost or returned damaged beyond reasonable repair, the borrower will be charged for the replacement cost of the book. Borrowers may supply a replacement copy in the same edition in good condition for a lost or damaged item in lieu of the replacement fee.

Required documentation

[Library Loan Agreement](#)

[Library Loan Ledger](#)

Incoming loans

At the discretion of the Director of Library and Archives, the library may borrow items through inter-library loan (e.g. from the American Philatelic Research Library) for other patrons, providing that the patron pays the costs incurred. The terms of the loan are provided by the lending library.

Required documentation

The lending library will provide the documentation. Store this documentation in an appropriate folder until the transaction is complete and the book returned.

Care

Items in the Library Collection are stored, accessed, and exhibited using appropriate standards of collection care.

Temperature and climate

The temperature in which the bulk of the Library Collection is stored should be between 65-70°F and the relative humidity should be between 47-55. The doors to the stacks should be closed as much as possible to help maintain this temperature. At this time, the maps and ephemera are housed in an area not separately temperature-controlled.

Documentation: Thermo-hygrometer (temperature and humidity) reports

Pests

There should be a Foundation-wide integrated pest management plan that includes regular professional pest-control (non-toxic). Additionally, Library and Archive Director should perform regular checks for evidence of pests. Food, drink, and chewing gum should be limited in the areas of collections.

Light

The Library Collection should have limited light exposure. The lights in the stacks should be turned off as much as possible. Library Collection items on display should be exposed to the least amount of light possible. This includes turning off any extra lighting in the area of the exhibit whenever possible and using UV filters on windows and light fixtures.

Pollutants

Materials in the collection should be housed to prevent dust and particulate exposure HVAC filters should be replaced regularly and HEPA-filtered vacuum cleaners should be used to reduce dust and particulates. Storage units, display cases, exhibition props, etc. that can potentially damage library collections with volatile organic components (VOCs) should be replaced whenever possible with those that would do less damage. The Foundation should not purchase items likely to damage objects with VOCs. The Library and Archive Director should consider the risks before accepting donations of such items as well.

Shelf maintenance

Library Collection materials should be stored using library best practices. Shelves and other containers should be dusted and cleaned regularly. Items should not be allowed to bend, flop, or “squish.” Shelves, drawers, and other containers should be tidied so that items are kept in good condition and less likely to tear or become otherwise damaged. Shelves should be “read” periodically (checked for correct placement).

Fire detection and suppression

Minimally, legal requirements should be met. Ideally, current library best practices should be researched and implemented.

Disaster Plan

A Disaster Plan, updated and practiced periodically, should be kept in multiple places, some off-site. Key personnel should be aware of the locations of the Disaster Plans and should be trained as needed.

Access

Reading room

The general public, whether or not they are Foundation members, shall have access to Library Collection material in the reading room, provided library rules and guidelines are followed. Library personnel will fetch items from the stacks and bring them to patrons. Items stored in the reading room (Scott catalogs, current journals) may be accessed directly by patrons.

Ground floor stacks

The ground floor stacks are adjacent to the reading room. In the past, patrons were allowed to browse. At this time, library staff will retrieve items from the stacks for patrons; patron browsing is not permitted. Guests on guided tours are allowed in with the docent. The docent should be the last person to leave the stacks.

Basement stacks

The basement stacks are closed stacks, or not open to the public. They contain the archives, the museum objects, auction catalogs, stamp show programs, old Scott catalogs, rare books, materials to accompany exhibits, organization directories, and unprocessed archival and museum donations. Persons authorized to enter the closed stacks without supervision should be listed on an Closed Stacks Access List, maintained by the Museum Collection Manager and Library and Archive Director. The persons on this list have authorization to enter the closed stacks unaccompanied by another authorized person, provided:

- They have first discussed access with the Museum Collection Manager and/or Library and Archive Director (exceptions: the Manager and Director are away for an extended period of time, or it's an emergency)
- They have an appropriate reason
 - Non-care-takers of collection: maintenance/building issues, pre-arranged special tours
 - Care-takers of collection: the above, plus tasks related to the care and use of the collection under the direction of the Museum Collection Manager or Library and Archive Director

The Museum Collection Manager, the Library and Archive Director, or the Board (as a voting block) may grant access to persons who will be put on the Closed Stacks Access List.

The Closed Stacks Access List does not grant permission to possess a key to the closed stacks door.

Required Documentation: [Closed Stacks Access List](#)

Ephemera/map area

The ephemera and map area is in between the kitchen area and the stairwell to the basement. This area is restricted to library personnel and other staff, volunteers, and Board Members who have an appropriate reason to be there. It is not open to guests or included in tours, unless expressly authorized by the Library and Archives Director. When patrons (including guests, staff, and volunteers) request ephemera files or maps, library staff will obtain them for the patrons.

Handling

- Materials must not be leaned on, written on, folded anew, traced, or handled in any way likely to damage them.

- No marks may be added or erased from any material.
- White cotton gloves are required for handling photographs.
- Clean, dry hands (no gloves) are required for handling paper.
- No ink is permitted in the reading room. Pencils are provided.

Security

A Key List should be kept by administration listing all persons who possess keys to the buildings and who have alarm codes. When not open for business, the Foundation should use an alarm system to provide more security for museum collections

Ground floor stacks

- The door to the ground floor stacks should be locked when the Director of Library and Archives leaves the reading room unattended for short periods of time, when the Director of Library and Archives is not on premises, and when the Foundation is closed.
- Those with access to the ground floor stacks keys should not enter the open stacks when the Director of Library and Archives is out, unless the activity is time-sensitive (e.g. a worker on site to do something).

Basement / closed stacks

- The door to the closed stacks should be locked when not in use.
- Keys to the closed stacks door should be limited to the Museum Collection Manager and Library and Archive Director, with spares accessible to authorized staff and volunteers in cases of emergency
- Persons not on the Closed Stacks Access List (e.g. non-authorized staff or volunteers, maintenance workers) should be accompanied at all times by a person on the Access List.

Map/ephemera

Security of this area is difficult, as there are no doors or locks there. It is expected that the Library and Archive Director and all Foundation personnel will work to execute the access policy when on premises.

Required Documentation: [Access List](#), Key List

Periodic inventories

The Library and Archive Director should conduct an inventory of the Library Collection every 3-5 years and include results in written reports to the Board of Directors. The inventory should include shelf reading, a check against the catalog, and linear feet occupied.

Food, drink, and plants

Food, drink, and plants should be limited around Library Collection materials, whether they are in storage, being worked on, or on exhibit. Ideally, there would be no food, drink, or plants in any public space or near library material.

If the Foundation hosts an event that will include food and drink, consideration should be given as to where food will be allowed and what kind of food or drink. Any food or drink or residue must be removed as soon as possible.

Cleaning

Materials, shelving units, etc. should be cleaned (using library standards) according to the Housekeeping Schedule by persons trained and authorized by the Library and Archives Director. Whenever possible, a museum-quality HEPA vacuum should be used to reduce dust and other pollutants. Shelves may be cleaned with a clean, dry cloth. The Library and Archives Director should research specific cleaning methods for specific materials in the collection. Dirty cloths should never be used. Solvents, sprays, soaps, etc. should never be used on any Library Collection material unless it has been thoroughly researched and approved by the Library and Archives Director.

Best practice documentation for cleaning: [Housekeeping Schedule](#)

Conservation and repair

Library Collection items that are worn, falling apart, etc. should be stabilized as much as possible by the Library and Archives Director using library standards. The Library and Archives Director may deem the item too damaged or fragile to be loaned out to members. If an item is sent out of house for repair, a note should be left in the item's "home" as well as in the item's catalog record.

Use

Who may use Library Collection material and for what purpose

The Foundation has an obligation to the public to allow reasonable access to and use of material. Library material generally consists of published items; the Foundation does not own the copyright to any items, save the few published by it. Therefore, the materials in the Library Collection are to be used for research, informational, and personal purposes only.

Any member of the general public may have reasonable access to the items under the library's rules and guidelines. Patrons using Library Collection materials must comply with the Foundation's care standards. The Library shall not disclose the lines of research or materials consulted by patrons unless directed by a court order.

Reproduction

The Foundation does not own the copyright to most items in the Library Collection. Therefore, it cannot give permission to reproduce material in print, online, or otherwise. Any reproductions allowed or provided by the Foundation are to be used for research, informational, or personal use only.

Photography

Unless signage says otherwise, photography of Library Collection material is permitted for personal use, provided that no flash or other supplementary light sources are used.

Scanning and photocopying

It is considered part of routine service to provide scans and photocopies of material to patrons. Therefore, every effort should be made to complete this service free of charge. When requests become burdensome (many pages, multiple requests, etc.), the Library and Archives Director may opt to impose a reasonable fee to off-set the resources spent.

Library staff provides scans or photocopies of material in compliance with copyright laws.

Usage data

The Library and Archives Director should document useful aspects of the use of Library Collection material. This may include the number of patrons, whether or not they are members, how they accessed material, which material was used, and any services provided (e.g. loan, reproduction). This data should be included in quarterly library reports to the Board of Directors.

Neither the names of patrons, nor their line of research and materials consulted, should be disclosed outside of Foundation staff and board without a court order.

Documentation

All collection-related activities must be documented by the Library and Archives Director using best practices. The documentation should be kept in a secure place that is known to the Board of Directors and the Executive Director (should one exist).

- [Donation Intake/Deed of Gift](#)
- [Book loan policy](#)
- [Book loan register](#)
- [Closed Stacks Access List](#)
- [Housekeeping Schedule](#)

ARCHIVES COLLECTION MANAGEMENT POLICY

Purpose

The materials in the Archives Collection at the Postal History Foundation are held for public education, preservation, and research purposes.

Scope

Content

The materials in the Archives Collection at the Postal History Foundation must support the Foundation's mission by consisting of or relating to:

- The postal history of
 - Arizona
 - New Mexico, particularly when Arizona and New Mexico comprised the same territory
 - Other western states
- Philately in Arizona
- The history of the Postal History Foundation and related programs
- The rules, regulations, routes, etc. of the United States Postal Service
- Materials used in Postal History Foundation or its members' publications

The Civil War Collection fulfills the promise made by the Foundation to the Slussers to care for Peggy Slusser's Civil War collection.

Format

Types of materials in the Archives Collection may include, but are not limited to:

- | | |
|---------------------------------|--|
| • Postal documents, forms, etc. | • Photographs, slides, and negatives |
| • Correspondence | • Paper artifacts (programs, brochures, meeting notes, event material, etc.) |
| • Research notes | • Newspaper clippings |
| • Stamps, covers, and postcards | |

Materials not generally found in the Archives Collection include 3-D objects, which would be considered for the Museum Collection (exception: Civil War Sub-Collection), published monographs and photocopies, which would be considered for the Library Collection, and stamp collections in albums, which would be considered for the Philatelic Collection.

Sub-Collections

The Archives Collection consists of three sub-collections: the Manuscript Collection, the Photograph Collection, and the Civil War Collection. The Manuscript and Photograph Collections actively support the Mission.

Materials pertaining to the Civil War are not actively collected nor sought after, as they do not support the mission, and the only reason the Foundation holds them is the original promise to the Slusser family. The Civil War Collection is accessioned and it stored in the same general area as the Manuscript and Photograph Collections. It contains both traditional archival material and also 3-D objects.

Levels of collecting

Emphasis should be given to philatelic and postal materials that are related to Arizona over New Mexico and other western states. Emphasis should be given to materials directly related to the Postal History Foundation over individual members. Civil War materials are not actively collected.

Limitations

- Generally, duplicates of material should not be retained.
 - Material that is used by more than one audience (e.g. a form used in the Tubac Post Office and the same form used in the Alpine Post Office) is not considered duplicate.
 - However, two blank forms are considered duplicate.
- If the material is sufficiently represented elsewhere (e.g. the National Postal Museum), and its absence in the collection would not be a significant detriment to the mission, it may be passed up for accessioning, even if it fits the scope of the museum collection.

Acquisition

How material is acquired

Archives Collection material must be acquired through the gift or donation of private individuals or groups, or transfers of custody from other museums and institutions.

Who may acquire the material

Because donations are often given as a large mixture of items such as stamps, albums, books, and postal and philatelic objects, anyone with authorization to accept such donations may acquire archival material. During this process, the donor must be made fully aware that donated items may or may not be accessioned, displayed, kept, or remain intact.

Caveats acquiring archival material

- Transfers of custody from other institutions should only be signed and accepted by the Library and Archives Director or a representative designated by them.
- Large quantities of material, large material, or any type of material that would strain resources (space, employee work time, etc.) should not be accepted without first consulting the Library and Archives Director.

Ethical considerations

- It is illegal and unethical to appraise or arrange for the monetary appraisal of potentially donated items, and the Foundation will not do it.
- If there is any suspicion regarding the ownership or authenticity of material, the Library and Archives Director should be consulted.

Required acquisition documentation

The following forms are required by the Foundation in general, but also by the Library and Archives Director if any items will be put in their donation cart for consideration; a photocopy of this form must accompany all items routed to the Library and Archives Director.

- [Donation Intake Form](#)
- [Deed of Gift \(Reverse side of Donation Intake Form\)](#)

Accession

Who may accession material into the Archives Collection

The Library and Archives Director has the sole authority to accession material into the Archives Collection. Once accessioned, the material is in the public trust and must be cared for and used using archival and museum best practices.

Criteria for accessioning material into the Archives Collection

- How well does this material align with our mission? Is there another institution at which this material may better align, receive better care, and be more useful to the public?
- Do the materials in question fit the Archives Collection scope? (see above)
- Consider the care that the material must have in order to be properly preserved, accessed, and/or exhibited. Does the Foundation currently have (and for the foreseeable future have) the resources to commit?
- If the material being considered is in poor condition, is large, is being donated in vast quantities, or in any other way could significantly use Foundation resources, the Library and Archives Director should write an Impact Statement, which will describe the anticipated impact the materials will have on Foundation resources, including space, preservation materials, staff time, etc.
- How represented is this material by other institutions?

Required accession documentation

- [Entry in the Accession Ledger](#) / [Entry in Accessions Access Database](#)
- [Accession Record](#) / [Entry in Accessions Access Database](#)
- Control File (contains copy of Deed of Gift)

Deaccession

The decision to deaccession should be taken even more seriously than the one to accession. Consider the following criteria when determining whether material should be deaccessioned:

Criteria for deaccessioning materials from the Archives Collection

- The material does not fit the scope of the collection and probably never should have been accessioned in the first place.
- The material's connection to the mission and relation to the scope is tenuous.
- The material is repeated in the collection.
- The Foundation does not have adequate resources (space, money for preservation, staff to care for, etc.) to properly care for the material—even if it fits the scope.
- Other institutions have this material and it is well-represented elsewhere.
- The material would reach a more appropriate audience and/or be better cared for at another institution.
- The Foundation is in dire financial trouble, and unless some of the collection is sold, the Foundation is in imminent danger of shutting its doors.

Caveats for deaccessioning materials from the Archives Collection

- It has not been in the collection for at least three years
- Its provenance is unknown (see Found-in-Collection section)
- It is missing or stolen
- There are restrictions on the materials, or promises or agreements were made at the time of acquisition that prevent deaccessioning (this will not occur after this document has been approved)

Who may deaccession materials from the Archives Collection

The Library and Archives Director should present a Recommendation for Deaccessioning Statement to the board. It is then up to the board to allow or disallow the Library and Archives Director to deaccession the material(s).

If authorized to deaccession, the Library and Archives Director should then begin the deaccession process. This, along with any other paperwork associated with the deaccessioning process, should be kept in the collection's control file. The file is kept in perpetuity.

Required deaccession documentation

- [Recommendation for Deaccessioning Statement](#)
- [Deaccession Form](#) (if applicable)

Acceptable methods of disposal after deaccessioning:

- **Transfer of custody** to another Archives or like institution (preferred)
 - Additional required documentation: [Transfer of Custody](#)
- **Sale** (not preferred)
 - The Foundation's financial need must be great enough to justify
 - Material should be sold through an auction house or a disinterested third party at a public sale
 - The Foundation's name should not be associated with the material
 - Board members, staff, and volunteers may not bid on nor purchase at a public sale deaccessioned material, unless the material is not sold at the conclusion of the sale
 - Anyone with direct decision-making regarding the deaccessioning (the Library and Archives Director and Board members) may not purchase the materials in any case
 - Deaccessioned material is never to be sold directly by the Foundation, either in the Foundation store or online
 - Deaccessioned material may not be gifted to individual persons (see exception under "Return") or transferred to any staff or board member
 - The proceeds from sales of deaccessioned material should be accounted for separately, and the money used to purchase items or pay persons to help catalog, preserve, conserve, and exhibit the materials in the collection
 - Additional documentation: Bill of sale/receipt of sale
- **Return**
 - Material may be returned if the donor or heirs have been notified of the deaccessioning of material (because the material is personal or has sentimental value, for example)
 - Additional required documentation: [Transfer of Custody](#)
- **Destruction** (least preferred)
 - Material that is severely deteriorated, hazardous, or forged should be destroyed.
 - Hazardous material should be disposed of in an appropriate manner.
 - Otherwise, material should be destroyed in such a way that if a person were to retrieve it from the trash, it would not be usable again.
 - Ideally, the destruction of the material should be witnessed by an impartial observer.

Loans

Outgoing Loans

To whom does the Foundation loan

The Postal History Foundation will loan materials in its Archival Collection only to other nonprofit organizations and to the United States Postal Service. Off-site professional conservation work done on

collection items is also considered an out-going loan. The purpose of the loans must align with the Foundation's mission.

Criteria and authorization of outgoing loans

Approval for loan requests is the responsibility of the Library and Archives Director, using the following criteria as a guide:

- To what extent does the loan fulfill the Foundation's mission?
- Can the material withstand packing, shipping, transportation?
- Can the borrower provide adequate security and adequate environmental conditions for the material?
- Does the Foundation need the material for its own exhibits or programs?
- How will the material be transported?
 - If the material is being mailed, the borrower should be responsible for shipping, including insurance if necessary
- If lost, stolen, or damaged, can the material be replaced; if so, how difficult would it be?
- Should the material be insured?

Considerations

Whenever possible, the Foundation should loan an identical, surplus items from the Interactive Collection to minimize risk of damage or theft to the permanent Archives Collection.

Packing/shipping

The Library and Archives Director is responsible for using best practices in packing the materials for transportation/shipping, and seeing to it that the materials are delivered (mail, pick-up, delivery). The Library and Archives Director is also responsible for receiving confirmation of arrival of the materials, maintaining documentation on the loan, and arranging for the return of the materials (pick-up, delivery, or mail).

Required outgoing loan documentation

- [Outgoing Loan Agreement](#)

As-necessary outgoing loan documentation

- [Permission to Use Form](#)

In-House Loans

Who may borrow and for what purpose

In-house loans occur when materials are used by a Foundation employee or volunteer, e.g. the Education Director taking a saddle bag to story time at a public library. The duration of these loans is short, normally one or two days. The employee or volunteer should have previously demonstrated

their ability to care for materials responsibly. The above questions under [Outgoing Loans](#) should be taken into consideration when the Library and Archives Director determines in-house loan approval.

The borrower is responsible for returning the materials, in the same condition as they were loaned, to the Library and Archives Director.

Material used in an in-house exhibit are considered to be loaned in-house. This material should be documented as such.

Consideration

Whenever possible, the Foundation should loan an identical, surplus items from the Interactive Collection to minimize risk of damage or theft to the permanent Archives Collection.

Required in-house loan documentation

- [In-House Loan Sheet](#)
- [Separation Sheet](#)

Incoming Loans

Who may the Foundation borrow from and for what purpose

The Library and Archives Director may request material on loan from other nonprofit organizations or individual persons. The Foundation may not borrow material from for-profit companies or from individual persons who are acting as a business. The purpose of the loan must align with the Foundation's mission. The loaned materials must be used for exhibiting, teaching, or research, and not to aid the lender in profiting (e.g. the sale of art work via the exhibit).

Who may request a loan?

The Library and Archives Director has the sole authority to request material on loan and to accept the terms of the borrower.

Considerations

Before a loan is requested, the following questions should be addressed:

- How will the material be used? To what extent does it fulfill the mission?
- Who is lending the material? Do they have clear title to the material?
- Is the material culturally sensitive or controversial?
- What restrictions will be placed on the material while it is on loan?
- Can the Foundation provide adequate security and environmental conditions while the material is on loan?
- What is the length of the loan period?
- What documentation is required for the loan?
- Is insurance required for the loan?

- How will the material be transported, and to where?

Packing/shipping/Returning

The Library and Archives Director is responsible for receiving the material and reporting their arrival to the lender, arranging for adequate security and environmental conditions, and monitoring the condition of the material through the loan period. When the loan period is over, or if the lender has requested the material be returned, the Library and Archives Director should use best practices in packing the material for transportation/shipping, and seeing to it that the material is delivered (mail, pick-up, and delivery).

The Foundation will return the material as quickly as possible to the lender and will not store the material any longer than is necessary.

Required incoming loan documentation

- [Incoming Loan Agreement](#)

Found-in-Collection

Items found-in-collection (FIC) have no clear ownership. This includes items that were dropped off for a possible donation but the person never signed paperwork and never returned, items that were donated anonymously and owners could never be located, or items that appeared to have been loaned to the Foundation at some point, but the items were never returned or claimed.

The Foundation does not receive material in custody that are not gifted or on loan. Temporary “drop-offs,” or storage of items for other persons or institutions are not allowed.

Identifying FICs

If any staff or volunteer of the Foundation discovers an object, paper, or artifact that does not seem to be part of a collection or belong in that location, they should leave the material there and report it to the Library and Archive Director to determine if the material should be classified as FIC.

Storage of FICs

FIC items should be labeled according to the information on the FIC Form and stored in archival conditions, distinct from Foundation collections.

Disposition of FICs

Every attempt should be made to track down the owner of the material and either return it, or require their signature on a deed of gift. If this is successful, the Foundation now is either no longer responsible for the material, or has clear ownership of the material and can accession or dispose of it as described in the Accession section. The FIC Form for the material in custody should be kept permanently even if

the material is returned to the owner, as documentation of the material's condition when it was returned.

If the owner of the material cannot be found or persuaded either to take back the material or sign a deed of gift, the Library and Archives Director should refer to Arizona Statutes, at this time [Title 44-Trade and Commerce, Chapter 3.1](#). Currently, the waiting period for unclaimed property in museums is seven years. The Library and Archives Director should use a schedule to initiate ownership claims on the object-in-custody.

Objects-in-custody cannot be accessioned or disposed of until the Foundation can establish ownership. Before that happens, the status of these items must remain as found-in-collection. FIC material should be regularly inventoried.

Exception

The exception to the policy regarding FIC material are all material known to have been in the Foundation's possession prior to 2019. This material, which was acquired through various donations and purchases over a span of fifty years, have little to no provenance, and there are few, if any, records relating to the ownership of the items. The Foundation assumes ownership of these items. If any item is later proven to be owned by another party, the Foundation should either acquire a deed of gift from the true owner, or deaccession the object and return it to the true owner.

Required documentation for material found-in-collection

- [Found-in-Collection Form](#)

Care

Items in the Archives Collection are stored, accessed, and exhibited using current archives and museum standards.

Temperature and climate

The temperature in which the Archival Collection is stored should be between 65-70°F and the relative humidity should be between 47-55.

Documentation: Thermo-hygrometer (temperature and humidity) reports

Pests

There should be a Foundation-wide integrated pest management plan that includes regular professional pest-control (non-toxic). Additionally, the Library and Archive Director should perform regular checks for evidence of pests. Food should be limited in the areas of collections.

Light

Archival Collection material should have limited light exposure. Material in the collection should be housed to prevent light exposure. The lights in the closed stacks should be turned off as much as possible. Material on display should be exposed to the least amount of light possible. This includes turning off any extra lighting in the area of the exhibit whenever possible and using UV filters on windows and light fixtures.

Pollutants

Material in the collection should be housed to prevent dust and particulate exposure HVAC filters should be replaced regularly and HEPA-filtered vacuum cleaners should be used to reduce dust and particulates. Various materials in the collection will emit different sorts of gasses (known as volatile organic components, or VOC); the Library and Archive Director should research them as they are accessioned to determine the best way to house the objects to reduce damage from these emissions. Storage units, display cases, exhibition props, etc. that can potentially damage archival collections with VOCs should be replaced with those that would do less damage. The Foundation should not purchase items likely to damage objects with VOCs. The Library and Archive Director should consider the risks before accepting donations of such items as well.

Fire detection and suppression

Minimally, legal requirements should be met. Ideally, current museum best practices should be researched and implemented.

Disaster Plan

A Disaster Plan, updated and practiced periodically, should be kept in multiple places, some off-site. Key personnel should be aware of the locations of the Disaster Plans and should be trained as needed.

Access

In general, the fewer people with access, the less risk of damage or theft. The permanent “home,” or storage for most archival material, as well as other library and museum items, is the closed stacks (basement). The Museum Collection Manager and Library and Archive Director are the custodians of these items, and access to these items must be through them.

Access List

Persons authorized to enter the closed stacks without supervision should be listed on a Closed Stacks Access List, maintained by the Museum Collection Manager and Library and Archive Director. The persons on this list have authorization to enter the closed stacks unaccompanied by another authorized person, provided:

- They have first discussed access with the Museum Collection Manager and Library and Archive Director (exceptions: they are away for an extended period of time or it’s an emergency)
- They have an appropriate reason

- Non-care-takers of collection: maintenance/building issues, pre-arranged special tours
- Care-takers of collection: the above, plus tasks related to the care and use of the collection under the direction of the Museum Collection Manager or Library and Archive Director

The Museum Collection Manager, the Library and Archive Director, or the Board (as a voting block) may grant access to persons who will be put on the Closed Stacks Access List.

The Closed Stacks Access List does not grant permission to possess a key to the closed stacks door.

Required Documentation: [Closed Stacks Access List](#)

Handling

Fundamental principles:

- Use common sense
- Have clean hands; wear clean white cotton gloves with photographs and objects
- Handle material as little as possible
- Handle material as if it were irreplaceable and fragile
- Handle only one item at a time
- Move slowly; never hurry
- Do not overload boxes, carts, or container
- Do not walk backwards while handling material

Before material is handled:

- Visually inspect the material before picking it up
- Know where you are going to set it down and make sure that area is clear and clean

Material protection:

- Wear good-fitting cotton gloves for photographs and objects
- Use two hands, or two people, if necessary
- Lift, don't slide or drag, the material
- Handle the material by its most stable surfaces
- Support the material's weight carefully

Security

- The door to the closed stacks should be locked when not in use.
- Keys to the closed stacks door should be limited to the Museum Collection Manager and Library and Archive Director, with spares accessible to authorized staff and volunteers in cases of emergency

- Persons not on the Closed Stacks Access List (e.g. non-authorized staff or volunteers, maintenance workers) should be accompanied at all times by a person on the Access List
- A Key List should be kept by administration listing all persons who possess keys to the buildings and who have alarm codes
- Archival Collection items loaned in-house (being cataloged, repaired, exhibited, or for other reasons not “at home” should be secured in a locked area until they are returned home
- When not open for business, the Foundation should use an alarm system to provide more security for archival collections

Required Documentation: [Access List](#), Key List

Periodic inventories

The Museum Collection Manager and Library and Archive Director should conduct an inventory every 3-5 years and include results in written reports to the Board of Directors.

Best practice documentation for inventories: [Basic Inventory Sheet](#)

Food, drink, and plants

Food, drink, and plants should be limited around archival material, whether they are in storage, being worked on, or on exhibit. Ideally, there would be no food, drink, or plants in any public space or near archival material.

If the Foundation hosts an event that will include food and drink, consideration should be given as to where food will be allowed and what kind of food or drink. Any food or drink or residue must be removed as soon as possible.

Cleaning

Collections, shelves, display cases, etc. should be cleaned (using archival and museum standards) according to the Housekeeping Schedule by persons trained and authorized by the Library and Archives Director. In most cases, a clean, dry cloth, such as a diaper, is the best tool. The Library and Archives Director should research specific cleaning methods for specific materials in the collection. Dirty cloths should never be used on collections. Solvents, sprays, soaps, etc. should never be used on any collection item unless it has been thoroughly researched and approved by the Library and Archives Director.

Best practice documentation for cleaning: [Housekeeping Schedule](#)

Conservation

Archival Collection items that are worn, falling apart, etc. should be stabilized as much as possible by the Library and Archives Director using museum standards. The object should remain “at home” until

the Library and Archives Director consults a professional conservator. A note should be left with the object as well as made in the object's catalog record.

Use

Who may use material from the Archives Collection and for what purpose

The Foundation has an obligation to the public to allow reasonable access to collections; it also has an obligation to future generations that the collection will still exist. There must be a balance of the preservation and use of museum objects.

Any use of the Archival Collection must support the Foundation's mission, be ethical, legal, and respect the integrity of the object.

How material from the Archives Collection is used and who authorizes their use

The most common use of material from the Archives Collection is that they are be called up for research by any member of the public in the Slusser Library reading room. In general, these requests should be fulfilled; however, the Library and Archives Director may opt not to fulfill them based on reasonable concerns over safety, security, or the cost of resources. To mitigate any concerns, the researcher should be encouraged to make an appointment in advance. Archives Collection material is also often displayed by the Foundation for the education and enjoyment of the general public.

Patrons examining material from the Archives Collection must comply with the Foundation's care standards. Patrons should also be supervised as closely and by as many people as the Library and Archives Director deems necessary under the circumstances.

Photography and reproduction of museum objects

Unless signage says otherwise, photography of material from the Archives Collection is permitted for personal use, provided that no flash or other supplementary light sources are used. Any images posted on social media should be credited to the Postal History Foundation. If another use (e.g. commercial, academic) is desired, the patron must first get approval from the Library and Archives Director, then fill out the Permission to Use Agreement Form.

Use agreement

As the Permission to Use form indicates, the Foundation strives to provide use free of charge, as long as Foundation finances will allow it. Donations are welcome. Additionally, the Foundation requires information or artifacts of the use. For example, if the use is a publication, the Foundation should receive a complimentary copy; if the use is a television show, the Foundation requires a press release or media kit sent when the program is broadcast.

Restrictions on use of material from the Archives Collection

The Library and Archives Director may revoke access should the patron not comply with the rules or act in any way unethically or illegally.

The Foundation should not allow access to or use of administrative records associated with the collection without a court order.

Required documentation for use of material from the Archives Collection

- [Permission to Use Agreement](#) (Use outside of reading room research)
- [Use of Archival, Photographic, and Rare Materials Agreement](#) (Use within reading room)

Documentation

All collection-related activities must be documented by the Library and Archives Director using best practices. The documentation should be kept in a secure place that is known to the Board of Directors and the Executive Director (should one exist).

Most documentation for Archival Collection material is maintained in the collection's control file, also known as an authority file.

A summary of documents associated with the Archives Collection:

- [Donation Intake Form](#) (Acquisition)
- [Deed of Gift Agreement](#) (Acquisition)
- [Accession Ledger](#) (Accession)
- [Accession Record](#) (Accession)
- Catalog Record (Accession, Description, Storage)
- [Found-in-Collection Record](#) (Inventory control)
- [Outgoing Loan Agreement](#) (Loan)
- [Incoming Loan Agreement](#) (Loan, Use)
- [In-House Loan List](#) (Loan, Use)
- [Transfer of Custody Agreement](#) (Inventory and scope of holdings control)
- [Access to Closed Stacks List](#) (Care, Access)
- [Housekeeping Schedule](#) (Care)
- [Separation Sheet](#) (Use, Inventory control)
- [Permission to Use Agreement](#) (Use)
- [Use of Archival, Photographic, and Rare Materials Agreement](#) (Use)
- [Deaccession Form](#) (Inventory and scope of holdings control)
- [Recommendation for Deaccession Statement](#) (Inventory and scope of holdings control)

MUSEUM COLLECTION MANAGEMENT POLICY

Purpose

The objects in the museum collection at the Postal History Foundation are kept for preservation, public education, and research purposes.

Scope

Content

The museum collections at the Postal History Foundation must support the Foundations mission and relate to

- The **business of sending and delivering mail**, including, but not limited to, objects and general office supplies used in the post office; and
- **Philately**, including, but limited to, stamps, postcards, envelopes, letter-writing, the collecting of said items and paraphernalia used in collecting.

Special consideration is given for objects that were created by the United States Postal Service, and/or used in Arizona.

The Foundation does not add to its Museum Collection items such as artwork made out of or inspired by postal material, knick-knacks, plaques/awards, or reproductions.

Limitations

- One or two objects that are like or identical (e.g. 2 uniform shirts from the same era) should be retained.
- One or two of each of object that are similar but have distinctive details (e.g. 1-2 hand cancellers for Fairbank, Arizona, 1-2 hand cancellers for Tubac, Arizona, etc.) should be retained.
- If the object is sufficiently represented elsewhere (e.g. the National Postal Museum), and its absence in the collection would not be a significant detriment to the mission, it may be passed up for accessioning, even if it fits the scope of the museum collection.

Acquisition

How objects are acquired

Objects in the museum collection must be acquired through the gift or donation of private individuals or groups, or transfers of custody from other museums and institutions.

Who may acquire the objects

Because donations are often given as a large mixture of items such as stamps, albums, books, and postal and philatelic objects, anyone with authorization to accept such donations may acquire museum objects. During this process, the donor must be made fully aware that donated items may or may not be accessioned, displayed, kept, or remain intact.

Caveats acquiring museum objects

- Transfers of custody from other institutions should only be signed and accepted by the Museum Collection Manager or a representative designated by them.
- Large quantities of objects, large objects, or any type of object that would strain resources (space, employee work time, etc.) should not be accepted without first consulting the Museum Collection Manager.

Ethical considerations

- It is illegal and unethical to appraise or arrange for the monetary appraisal of potentially donated items, and the Foundation will not do it.
- If there is any suspicion regarding the ownership or authenticity of an object, the Museum Collection Manager should be consulted.

Required acquisition documentation

The following forms are required by the Foundation in general, but also by the Museum Collection Manager if any items will be put in their donation cart for consideration; a photocopy of this form must accompany all items routed to the Museum Collection Manager.

- [Donation Intake Form](#)
- [Deed of Gift \(Reverse side of Donation Intake Form\)](#)

Accession

Who may accession objects into the Museum Collection

The Museum Collection Manager has the sole authority to accession an object into the museum collection. Once accessioned, the object is in the public trust and must be cared for and used using archival and museum best practices.

Criteria for accessioning objects into the Museum Collection

- How well does this object align with our mission? Is there another institution at which this object may better align, receive better care, and be more useful to the public?
- Do the objects in question fit the Museum Collection scope? (see above)
- Consider the care that the item must have in order to be properly preserved and/or exhibited. Does the Foundation currently have (and for the foreseeable future have) the resources to commit?
- If the objects being considered are in poor condition, are large, are being donated in vast quantities, or in any other way could significantly use Foundation resources, the Museum Director should write an Impact Statement, which will describe the anticipated impact the objects will have on Foundation resources, including space, preservation materials, staff time, etc.
- How represented is this object by other institutions?

Required accession documentation

- Entry in the [Accession Ledger](#)
- [Accession Record](#)
- Control File (contains copy of Deed of Gift)

Deaccession

The decision to deaccession should be taken even more seriously than the one to accession. Consider the following criteria when determining whether an object should be deaccessioned:

Criteria for deaccessioning objects from the Museum Collection

- The object(s) do not fit the scope of the collection and probably never should have been accessioned in the first place.
- The object(s)' connection to the mission and relation to the scope is tenuous.
- The objects are repeated in the collection.
- The Foundation does not have adequate resources (space, money for preservation, staff to care for, etc.) to properly care for the object(s)—even if they fit the scope.
- Other institutions have these objects and they are well-represented elsewhere.
- The object(s) would reach a more appropriate audience and/or be better cared for at another institution.
- The Foundation is in dire financial trouble, and unless some of the collection is sold, the Foundation is in imminent danger of shutting its doors.

Caveats deaccessioning objects from the Museum Collection

- It has not been in the collection for at least three years
- Its provenance is unknown (see Found-in-Collection section)
- It is missing or stolen
- There are restrictions on the objects, or promises or agreements were made at the time of acquisition that prevent deaccessioning (this will not occur after this document has been approved)

Who may deaccession objects from the Museum Collection

The Museum Collection Manager should present a Recommendation for Deaccessioning Statement to the board. It is then up to the board to allow or disallow the Museum Collection Manager to deaccession the object(s).

If authorized to deaccession, the Museum Collection Manager should then begin the deaccession process. This, along with any other paperwork associated with the deaccessioning process, should be kept in the collection's control file. The file is kept in perpetuity.

Required deaccession documentation

- [Recommendation for Deaccessioning Statement](#)
- [Deaccession Form](#) (if applicable)

Acceptable methods of disposal after deaccessioning:

- **Transfer of custody** to another museum or like institution (preferred)
 - Additional required documentation: [Transfer of Custody](#)
- **Sale** (not preferred)
 - The Foundation's financial need must be great enough to justify
 - Objects should be sold through an auction house or a disinterested third party at a public sale
 - The Foundation's name should not be associated with the object(s)
 - Board members, staff, and volunteers may not bid on nor purchase at a public sale deaccessioned objects, unless the objects are not sold at the conclusion of the sale
 - Anyone with direct decision-making regarding the deaccessioning (the Museum Collection Manager, Executive Director (should one exist), and Board members) may not purchase the objects in any case
 - Deaccessioned objects are never to be sold directly by the Foundation, either in the Foundation store or online
 - Deaccessioned objects may not be gifted to individual persons (see exception under "Return") or transferred to any staff or board member
 - The proceeds from sales of deaccessioned objects should be accounted for separately, and the money used to purchase items or pay persons to help catalog, preserve, conserve, and exhibit the objects in the collection
 - Additional documentation: Bill of sale/receipt of sale
- **Return**
 - Objects may be returned if the donor or heirs have been notified of the deaccessioning of an object (because the object is personal or has sentimental value, for example)
 - Additional required documentation: [Transfer of Custody](#)
- **Destruction** (least preferred)
 - Objects that are severely deteriorated, hazardous, or forged should be destroyed.
 - Hazardous materials should be disposed of in an appropriate manner.
 - Otherwise, objects should be destroyed in such a way that if a person were to retrieve it from the trash, it would not be usable again.
 - Ideally, the destruction of the object should be witnessed by an impartial observer.

Loans

Outgoing Loans

To whom does the Foundation loan

The Postal History Foundation will loan objects in its collections only to other nonprofit organizations and to the United States Postal Service. Off-site professional conservation work done on collection items is also considered an out-going loan. The purpose of the loans must align with the Foundation's mission.

Criteria and authorization of outgoing loans

Approval for loan requests is the responsibility of the Museum Collection Manager, using the following criteria as a guide:

- To what extent does the loan fulfill the Foundation's mission?
- Can the objects withstand packing, shipping, transportation?
- Can the borrower provide adequate security and adequate environmental conditions for the objects?
- Does the Foundation need the objects for its own exhibits or programs?
- How will the objects be transported?
 - If the objects are being mailed, the borrower should be responsible for shipping, including insurance if necessary
- If lost, stolen, or damaged, can the objects be replaced; if so, how difficult would it be?
- Should the objects be insured?

Considerations

Whenever possible, the Foundation should loan an identical, surplus item from the Interactive Collection to minimize risk of damage or theft to the permanent Museum Collection.

Packing/shipping

The Museum Collection Manager is responsible for using best museum practices in packing the objects for transportation/shipping, and seeing to it that the objects are delivered (mail, pick-up, delivery). The Museum Collection Manager is also responsible for receiving confirmation of arrival of the objects, maintaining documentation on the loan, and arranging for the return of the objects (pick-up, delivery, or mail).

Required outgoing loan documentation

- [Outgoing Loan Agreement](#)

As-necessary outgoing loan documentation

- [Permission to Use Form](#)

In-House Loans

Who may borrow and for what purpose

In-house loans occur when objects are used by a Foundation employee or volunteer, i.e. the Education Director taking a saddle bag to story time at a public library. The duration of these loans is short, normally one or two days. The employee or volunteer should have previously demonstrated their ability to care for objects responsibly. The above questions under [Outgoing Loans](#) should be taken into consideration when the Museum Collection Manager determines in-house loan approval.

The borrower is responsible for returning the objects, in the same condition as they were loaned, to the Museum Collection Manager.

Objects used in an in-house exhibit are considered to be loaned in-house. These objects should be documented as such.

Consideration

Whenever possible, the Foundation should loan an identical, surplus item from the Interactive Collection to minimize risk of damage or theft to the permanent Museum Collection.

Required in-house loan documentation

- [In-House Loan Sheet](#)
- [Separation Sheet](#)

Incoming Loans

Who may the Foundation borrow from and for what purpose

The Postal History Foundation may request objects on loan from other nonprofit organizations or individual persons. The Foundation may not borrow objects from for-profit companies or from individual persons who are acting as a business. The purpose of the loan must align with the Foundation's mission. The loaned objects must be used for exhibiting, teaching, or research, and not to aid the lender in profiting (e.g. the sale of art work via the exhibit).

Who may request a loan?

The Museum Collection Manager, Library and Archives Director, and Education Director have the sole authority to request objects on loan and to accept the terms of the borrower. If the requestor is not the Museum Collection Manager, they must be consulted before the request is made.

Considerations

Before a loan is requested, the following questions should be addressed:

- How will the objects be used? To what extent does it fulfill the mission?
- Who is lending the objects? Do they have clear title to the objects?

- Are the objects culturally sensitive or controversial?
- What restrictions will be placed on the objects while they are on loan?
- Can the Foundation provide adequate security and environmental conditions while the object is on loan?
- What is the length of the loan period?
- What documentation is required for the loan?
- Is insurance required for the loan?
- How will the objects be transported, and to where?

Packing/shipping/Returning

The Museum Collection Manager is responsible for receiving the objects and reporting their arrival to the lender, arranging for adequate security and environmental conditions, and monitoring the condition of the objects through the loan period. When the loan period is over, or if the lender has requested the objects be returned, the Museum Collection Manager should use museum best practices in packing the objects for transportation/shipping, and seeing to it that the objects are delivered (mail, pick-up, and delivery).

The Foundation will return the objects as quickly as possible to the lender and will not store the objects any longer than is necessary.

Required incoming loan documentation

- [Incoming Loan Agreement](#)

Found-in-Collection

Items found-in-collection (FIC) have no clear ownership. This includes items that were dropped off for a possible donation but the person never signed paperwork and never returned, items that were donated anonymously and owners could never be located, or items that appeared to have been loaned to the Foundation at some point, but the items were never returned or claimed.

The Foundation does not receive objects in custody that are not gifted or on loan. Temporary “drop-offs,” or storage of items for other persons or institutions are not allowed.

Identifying FICs

If any staff or volunteer of the Foundation discovers an object, paper, or artifact that does not seem to be part of a collection or belong in that location, they should leave the item there and report it to the Museum Collection Manager or Library and Archive Director. One of them will determine if the item should be classified as FIC.

Storage of FICs

FIC objects should be labeled according to the information on the FIC Form and stored in archival conditions, distinct from Foundation collections.

Disposition of FICs

Every attempt should be made to track down the owner of these objects and either return them, or require their signature on a deed of gift. If this is successful, the Foundation now is either no longer responsible for the object, or has clear ownership of the object and can accession or dispose of the object as described in the Accession section. The FIC Form for the object in custody should be kept permanently even if the object is returned to the owner, as documentation of the object's condition when it was returned.

If the owner of the objects cannot be found or persuaded either to take back the object or sign a deed of gift, the Museum Collection Manager should refer to Arizona Statutes, at this time [Title 44- Trade and Commerce, Chapter 3.1](#). Currently, the waiting period for unclaimed property in museums is seven years. The Museum Collection Manager should use a schedule to initiate ownership claims on objects-in-custody.

Objects cannot be accessioned or disposed of until the Foundation can establish ownership. Before that happens, the status of these items must remain as found-in-collection. FIC objects should be regularly inventoried.

Exception

The exception to the policy regarding FIC objects are all objects known to have been in the museum's possession prior to 2019. These objects, which were acquired through various donations and purchases over a span of fifty years, have little to no provenance, and there are few, if any, records relating to the ownership of the items. The Foundation assumes ownership of these items. If any object is later proven to be owned by another party, the Foundation should either acquire a deed of gift from the true owner, or deaccession the object and return it to the true owner.

Required documentation for objects found-in-collection

- [Found-in-Collection Form](#)

Care

Items in the museum collection are stored, accessed, and exhibited using current museum standards.

Temperature and climate

The temperature in which the museum collection is stored should be between 65-70°F and the relative humidity should be between 47-55.

Documentation: Thermo-hygrometer (temperature and humidity) reports

Pests

There should be a Foundation-wide integrated pest management plan that includes regular professional pest-control (non-toxic). Additionally, the Museum Collection Manager or Library and Archive Director should perform regular checks for evidence of pests. Food should be limited in the areas of collections.

Light

The museum collection objects should have limited light exposure. Objects in the collection should be housed to prevent light exposure. The lights in the closed stacks should be turned off as much as possible. Objects on display should be exposed to the least amount of light possible. This includes turning off any extra lighting in the area of the exhibit whenever possible and using UV filters on windows and light fixtures.

Pollutants

Objects in the collection should be housed to prevent dust and particulate exposure HVAC filters should be replaced regularly and HEPA-filtered vacuum cleaners should be used to reduce dust and particulates. Various materials in the collection will emit different sorts of gasses (known as volatile organic components, or VOC); the Museum Collection Manager or Library and Archive Director should research them as they are accessioned to determine the best way to house the objects to reduce damage from these emissions. Storage units, display cases, exhibition props, etc. that can potentially damage museum collections with VOCs should be replaced with those that would do less damage. The Foundation should not purchase items likely to damage objects with VOCs. The Museum Collection Manager or Library and Archive Director should consider the risks before accepting donations of such items as well.

Fire detection and suppression

Minimally, legal requirements should be met. Ideally, current museum best practices should be researched and implemented.

Access

In general, the fewer people with access, the less risk of damage or theft. The permanent “home,” or storage for most museum objects, as well as other library and archives items, is the closed stacks (basement). The Museum Collection Manager and Library and Archive Director are the custodians of these items, and access to these items must be through them.

Access List

Persons authorized to enter the closed stacks without supervision should be listed on an Closed Stacks Access List, maintained by the Museum Collection Manager and Library and Archive Director. The persons on this list have authorization to enter the closed stacks unaccompanied by another authorized person, provided:

- They have first discussed access with the Museum Collection Manager and Library and Archive Director (exceptions: they are away for an extended period of time or it’s an emergency)
- They have an appropriate reason
 - Non-care-takers of collection: maintenance/building issues, pre-arranged special tours
 - Care-takers of collection: the above, plus tasks related to the care and use of the collection under the direction of the Museum Collection Manager or Library and Archive Director

The Museum Collection Manager, the Library and Archive Director, or the Board (as a voting block) may grant access to persons who will be put on the Closed Stacks Access List.

The Closed Stacks Access List does not grant permission to possess a key to the closed stacks door.

Required Documentation: [Closed Stacks Access List](#)

Handling

Fundamental principles:

- Use common sense
- Have clean hands; wear clean white cotton gloves
- Handle objects as little as possible
- Handle each object as if it were irreplaceable and fragile
- Handle only one object at a time
- Move slowly; never hurry
- Do not overload boxes, carts, or container
- Do not walk backwards while handling objects

Before an object is handled:

- Visually inspect the object before picking it up

- Know where you are going to set it down and make sure that area is clear and clean

Object protection:

- Wear good-fitting cotton gloves
- Use two hands, or two people, if necessary
- Lift, don't slide or drag, the object
- Handle the object by its most stable surfaces
- Support the object's weight carefully

Security

- The door to the closed stacks should be locked when not in use.
- Keys to the closed stacks door should be limited to the Museum Collection Manager and Library and Archive Director, with spares accessible to authorized staff and volunteers in cases of emergency
- Persons not on the Closed Stacks Access List (e.g. non-authorized staff or volunteers, maintenance workers) should be accompanied at all times by a person on the Access List
- A Key List should be kept by administration listing all persons who possess keys to the buildings and who have alarm codes
- Museum collection items loaned in-house (being cataloged, repaired, exhibited, or for other reasons not "at home" should be secured in a locked area until they are returned home
- When not open for business, the Foundation should use an alarm system to provide more security for museum collections

Required Documentation: [Access List](#), Key List

Periodic inventories

The Museum Collection Manager and Library and Archive Director should conduct an inventory every 3-5 years and include results in written reports to the Board of Directors.

Best practice documentation for inventories: [Basic Inventory Sheet](#)

Food, drink, and plants

Food, drink, and plants should be limited around museum objects, whether they are in storage, being worked on, or on exhibit. Ideally, there would be no food, drink, or plants in any public space or near museum collections.

If the Foundation hosts an event that will include food and drink, consideration should be given as to where food will be allowed and what kind of food or drink. Any food or drink or residue must be removed as soon as possible.

Cleaning

Collections, shelves, display cases, etc. should be cleaned (using museum standards) according to the Housekeeping Schedule by persons trained and authorized by the Museum Collection Manager. In most cases, a clean, dry cloth, such as a diaper, is the best tool. The Museum Collection Manager should research specific cleaning methods for specific materials in the collection. Dirty cloths should never be used on collections. Solvents, sprays, soaps, etc. should never be used on any museum collection item unless it has been thoroughly researched and approved by the Museum Collection Manager.

Best practice documentation for cleaning: [Housekeeping Schedule](#)

Conservation

Museum collection items that are worn, falling apart, etc. should be stabilized as much as possible by the Museum Collection Manager using museum standards. The object should remain “at home” until the Museum Collection Manager consults a professional conservator. A note should be left with the object as well as made in the object’s catalog record.

Use

Who may use objects in the Museum Collection and for what purpose

The Foundation has an obligation to the public to allow reasonable access to collections; it also has an obligation to future generations that the collection will still exist. There must be a balance of the preservation and use of museum objects.

Any use of the museum collection must support the Foundation’s mission, be ethical, legal, and respect the integrity of the object.

How objects in the Museum Collection are used and who authorizes their use

The most common use of objects in the museum collection is that they are displayed by the Foundation for the education and enjoyment of the general public. Museum collections may also be called up by any member of the public in the Slusser Library reading room. In general, these requests should be fulfilled; however, the Museum Collection Manager or Library and Archives Director may opt not to fulfill them based on reasonable concerns over safety, security, or the cost of resources. To mitigate any concerns, the researcher should be encouraged to make an appointment in advance.

Patrons examining museum objects must comply with the Foundation’s care standards. Patrons should also be supervised as closely and by as many people as the Museum Collection Manager or Library and Archives Director deems necessary under the circumstances.

Photography and reproduction of museum objects

Unless signage says otherwise, photography of museum collections is permitted for personal use, provided that no flash or other supplementary light sources are used. Any images posted on social media should be credited to the Postal History Foundation. If another use (e.g. commercial, academic) is desired, the patron must first get approval from the Museum Collection Manager or Library and Archives Director then fill out the Permission to Use Form.

Restrictions on use of museum objects

The Museum Collection Manager or Library and Archives Director may revoke access should the patron not comply with the rules or act in any way unethically or illegally.

The Foundation should not allow access to or use of administrative records associated with the collection without a court order.

Required documentation for use of objects in the Museum Collection

- [Permission to Use Agreement](#) (Use outside of reading room research)
- [Use of Archival, Photographic, and Rare Materials Agreement](#) (Use within reading room)

Documentation

All collection-related activities must be documented by the Museum Collection Manager using best practices. The documentation should be kept in a secure place that is known to the Board of Directors and the Executive Director (should one exist).

Most documentation for objects is maintained in the object's control file, also known as an authority file.

A summary of documents associated with the Museum Collection:

- [Donation Intake Form](#) (Acquisition)
- [Deed of Gift Agreement](#) (Acquisition)
- [Accession Ledger](#) (Accession)
- [Accession Record](#) (Accession)
- Catalog Record (Accession, Description, Storage)
- [Found-in-Collection Record](#) (Inventory control)
- [Outgoing Loan Agreement](#) (Loan)
- [Incoming Loan Agreement](#) (Loan, Use)
- [In-House Loan List](#) (Loan, Use)
- [Transfer of Custody Agreement](#) (Inventory and scope of holdings control)
- [Access to Closed Stacks List](#) (Care, Access)
- [Housekeeping Schedule](#) (Care)

- [Separation Sheet](#) (Use, Inventory control)
- [Permission to Use Agreement](#) (Use)
- [Use of Archival, Photographic, and Rare Materials Agreement](#) (Use)
- [Deaccession Form](#) (Inventory and scope of holdings control)
- [Recommendation for Deaccession Statement](#) (Inventory and scope of holdings control)

INTERACTIVE COLLECTION

Purpose

Items in the Interactive Collection are meant to be touched and used by guests in order to help educate them. They are not kept for preservation, and may, in fact, become damaged or destroyed through use.

Scope

Objects in the Interactive Collection at the Postal History Foundation must support the Foundations mission and relate to

1. The **business of sending and delivering mail**, including, but not limited to, objects and general office supplies used in the post office; and
2. **Philately**, including, but limited to, stamps, postcards, envelopes, letter-writing, the collecting of said items and paraphernalia used in collecting.

Acquisition

Objects in the Interactive Collection are acquired in the same manner as objects in the Museum Collection.

When donations are acquired, priority is given to accessioning the objects in the Museum Collection. If the objects are not needed or wanted in the Museum Collection, they may be placed in the Interactive Collection by either the Museum Collection Manager or Education director. When making this decision, the following should be considered:

- How well does this object align with our mission?
- How well do the objects fit the scope?
- What condition are the objects in?
- Does the Foundation currently have (and for the foreseeable future have) the resources to commit to storing, cleaning, and maintaining the objects?
- Would the objects make good learning tools in an interactive environment?

Adding to the Interactive Collection

The Donation Intake /Deed of Gift Form should be amended to reflect the item's placement in the Interactive Collection. The Donation Intake /Deed of Gift Form should be placed in the Not Accessioned folder.

The Interactive Collection items are not accessioned because they are consumable objects not meant for preservation. The items are inventoried in a database that distinguishes them from the accessioned items in the Museum Collection. The Museum Collection Manager will inventory the object(s) using the procedures described in the Museum Collection Manual.

Rejecting for the Interactive Collection

Items that are not retained for the Interactive Collection should be disposed of as described in the Museum Collection's [Acceptable methods for disposal](#) sub-section in the Deaccessioning section. It should be noted that "sale" as a disposal method for items never accessioned (e.g. items rejected for the Interactive Collection) is more acceptable than items that have been deaccessioned.

Loans

Outgoing and In-House Loans

According to the Outgoing and In-House Loan policy for the Museum Collection, whenever possible, the Foundation should loan an identical, surplus item from the Interactive Collection to minimize risk of damage or theft to the permanent Museum Collection. The object must be as authentic as that in the Museum Collection; the only difference is that it is an extra one.

Required documentation: [Outgoing Loan Agreement](#) or [In-House Loan List](#)

Incoming Loans

The Foundation should never use borrowed items in the Interactive Collection. The Foundation is obligated to return the items in the condition they were given, and, as objects in the Interactive Collection will be used, touched, and worn, that would be impossible.

Access

The Interactive Collection is under the joint supervision of the Museum Collection Manager, Library and Archives Director, and Education Director. So that they can maintain inventory and quality control, items in storage should only be accessed by the Museum Collection Manager, Library and Archives Director, and/or Education Director. Items being used in a display may be accessed by any member of the general public, including other staff and volunteers. If an item in an exhibit becomes damaged, the Museum Collection Manager, Library and Archives Director, and/or Education Director should be notified; other staff or volunteer should not attempt to repair the item on their own.

The Museum Collection Manager, Library and Archives Director, and/or Education Director may revoke access should individuals not comply with the rules or act in any way unethically or illegally.

Use

The items in the Interactive Collection are used in interactive exhibits that are planned by the Museum and Education Directors. Their use has specific purpose within the Interpretation Plan created by the

Museum Collection Manager, Library and Archives Director, and Education Director. The manner of use varies with the type of item, for example, a uniform shirt may be worn when pretending to sort mail, or a money order stamp may be inked and pressed on a money order.

With the design of each interactive exhibit, a description of the use, necessary condition, placement, etc. of the items will be given. The Museum Collection Manager, Library and Archives Director, and/or Education Director should check the interactive exhibits throughout the day and replace items or adjust as necessary.

As items are pulled to be used in exhibits, their inventory records should be updated.

If an item in the Museum Collection is lost, damaged, or stolen, a similar item from the Interactive Collection may be accessioned into the Museum Collection as a replacement. The Donation Intake Form/Deed of Gift Agreement (which should be in the Not Accessioned folder) will need to be updated.

Care

When not in use, these objects are kept in a clean, dry environment. The storage location of individual items in the Interactive Collection may vary, but are indicated in the inventory.

The Museum Collection Manager, Library and Archives Director, and Education Director are responsible for the cleaning, laundering, etc. of the items used in the interactive exhibits following a Housekeeping Schedule. Additional cleaning may be needed depending on the number and health of visitors.

Best practice documentation

- [Housekeeping Schedule](#)

Disposal

As items become worn, torn, and damaged, they will need to be disposed of. The Museum Collection Manager, Library and Archives Director, and/or Education Director should make the decision to do so. Objects should be destroyed by the Museum Collection Manager, Library and Archives Director, and/or Education Director in such a way that if a person were to retrieve them from the trash, they would not be usable again. Objects should not be disposed of in front of guests

DISPLAY ENHANCEMENT COLLECTION

Purpose:

The objects in this collection enhance the exhibits' appeal and educational value.

Scope

The Display Enhancement Collection includes knick-knacks, decorations, artwork, figurines, awards, etc. that do not fit into the Museum, Interactive, or Education Collections.

Acquisition

Items for the Display Enhancement Collection may be donated or purchased. Items that are purchased for this collection should be relatively inexpensive; for example, a pack of star stickers or a model stagecoach. These items are generally not consumable (otherwise, they would be supplies).

Required documentation

- [Donation Intake/Deed of Gift Form](#), or
- Receipt of purchase

Adding to the Display Enhancement Collection

The Museum Collection Manager, Education Director, or Library and Archives Director select items for the Display Enhancement Collection. When making this decision, the following should be considered:

- How well does this object align with our mission?
- How well do the objects fit the scope?
- What condition are the objects in?
- Does the Foundation currently have (and for the foreseeable future have) the resources to commit to storing, cleaning, and maintaining the objects?
- Would the objects help engage visitors?
- How often would this type of object be used in a display? Is the topic so narrow it may only be used once?

If added to the Display Enhancement Collection, the item is not inventoried. It is placed in one of several designated places for this collection (all are labeled). If the Display Enhancement Collection becomes unwieldy, the Museum Collection Manager may decide inventory them and suggest a revision of this policy.

Access

The Display Enhancement Collection is under the joint supervision of the Museum Collection Manager, Library and Archives Director, and Education Director. So that they can maintain inventory and quality control, items in storage should only be accessed when needed. If an item in an exhibit becomes damaged, the

Museum Collection Manager, Library and Archives Director, and Education Director should be notified; other staff or volunteer should not attempt to repair the item on their own.

Use

The items in the Display Enhancement Collection are used as props in exhibits that are planned by the Museum Collection Manager, Library and Archives Director, and/or Education Director. Their use has specific purpose within the Interpretation Plan created by the Museum Collection Manager, Library and Archives Director, and Education Director.

Care

When not in use, these objects are kept in a clean, dry environment. They are placed in one of several designated places for this collection (all are labeled). A list of locations housing objects in the Display Enhancement Collection is kept by the Museum Collection Manager, Library and Archives Director, and Education Director.

Disposing of Objects in the Display Enhancement Collection

Items that are not retained for the Display Enhancement Collection (or are no longer wanted) should be disposed of by one of the methods below. None of them should be done in the presence of guests.

Sale

Selling the object to help support the Foundation is the preferred method of disposal. It should be given to the Sales Department, where they will determine the best way to sell it.

Free pile

If the object has little monetary value, it may not be worth the time to try and sell it. It may be placed in the “free pile.”

Destruction

If the object has little monetary value, and if it is in very poor condition, it may be thrown away. If this is the method of disposal, the object should be destroyed and/or placed inside another bag or box before being put into the exterior trash can.

APPENDIX

Most of the documentation referred to is in the Appendix. The style of the documentation is subject to change but the content needs board approval before implementation.

Alphabetical list of documentation:

- [Accession Ledger](#)
- [Accession Record](#)
- [Access to Closed Stacks List](#)
- [Archival Collection Basic Inventory Sheet](#)
- [Book Loan Policy](#)
- [Book Loan Register](#)
- [Deaccession Form](#)
- [Deed of Gift Agreement](#)
- [Donation Intake Form](#)
- [Found-In-Collection Record](#)
- [Housekeeping Schedule](#)
- [Incoming Loan Agreement](#)
- [In-House Loan List](#)
- [Museum Collection Basic Inventory Sheet](#)
- [Outgoing Loan Agreement](#)
- [Permission to Use Agreement](#)
- [Recommendation for Deaccession Statement](#)
- [Transfer of Custody Agreement](#)
- [Use of Archival, Photographic, and Rare Materials Agreement](#)

DONATION INTAKE FORM

DONOR'S NAME		
ADDRESS		
CITY	STATE	ZIP CODE
DATE RECEIVED	PHONE NUMBER	

# OF UNITS	MATERIALS RECEIVED

Administrative use only

INVENTORIED BY (LIST ATTACHED)

LETTER OF ACKNOWLEDGEMENT DATE COMPLETED

DEED OF GIFT AGREEMENT

I hereby irrevocably and unconditionally give, transfer, and assign to the Postal History Foundation all rights, title and interests (including all copyright and trademark interests) in, to and associated with the items described below. I hereby warrant that I am the owner, or legal representative for the owner, of the items listed and make this gift of my own free will, without limiting conditions. I understand that the items shall be used at the Postal History Foundation’s discretion and in accordance with its written collections policy and procedures. I understand that the items I am donating may or may not be accessioned, displayed, kept, or remain intact.

I certify that I have read and understand this Deed of Gift Agreement and agree to its terms:

Donor Signature_____Date_____

PHF Representative Signature_____Date_____

(Print name) _____Title_____

<i>Museum Collection Manager use only</i>	
Date:	Initials:
Location/temporary identification:	
Description/condition/notes:	

ACCESSION LEDGER

[illegible]

ACCESSION RECORD

Accession Number

Description

Name of collection

Creator:

Extent (quantity):

Dates covered:

Scope/Content/Subjects:

Acquisition information

Date of acquisition:

Source of acquisition:

Contact person:

Address:

Phone/Email:

Transfer/Purchase/Gift:

Restrictions:

Repository:

Peggy J. Slusser Memorial Library
920 N. First Avenue
Tucson, Arizona, 85719

Media / content

Notes/paper/textual records	Loose photographs
Postage stamps	Photograph albums
Covers/Postcards	Computer files
Newspaper clippings	Other:
Other ephemera (paper)	

Location of items pending processing

Other notes

The persons on this list have authorization to enter the closed stacks unaccompanied by another authorized person, per criteria in the Library, Archives and Museum Collections Policies.

If access is revoked, cross the name out and initial. If an explanatory note is needed, file with this list.

[illegible]

FOUND-IN-COLLECTION RECORD

Date:	Object name:
-------	--------------

Object description:

Date found:	Who found, and where:
-------------	-----------------------

Provenance research:
<input type="checkbox"/> Checked object for accession number or other identification
<input type="checkbox"/> Checked nearby for identification, context
<input type="checkbox"/> Checked database/catalog
<input type="checkbox"/> Checked general provenance file
<input type="checkbox"/> Asked key people (list)

Initial thoughts on object and provenance:
--

FIC number assigned:	Wish to accession?	Date PHF eligible for title:
----------------------	--------------------	------------------------------

Disposition:	Date:	Accession number:
--------------	-------	-------------------

If object is accessioned, place this form in its control file. If it is donated, sold, or destroyed, place this form in the Not Accessioned file.

DEACCESSION FORM

Description

Accession number _____

Name of collection _____

Disposition of item:

Method	Description/Documentation
<input type="checkbox"/> Transfer of custody	_____
<input type="checkbox"/> Sale	_____
<input type="checkbox"/> Return	_____
<input type="checkbox"/> Destruction	_____

Approved by the Board of Directors on this date: _____

Reason for deaccession

Additional notes

Authorized Foundation Representative

Date

RECOMMENDATION FOR DEACCESSION STATEMENT

[Sample template]

I recommend that the following collection be deaccessioned:

Accession number [], [] Collection

for the following reasons:

[Use the following to help guide explanation:

- The object(s) do not fit the scope of the collection and probably never should have been accessioned in the first place.
- The object(s)' connection to the mission and relation to the scope is tenuous.
- The objects are repeated in the collection.
- The Foundation does not have adequate resources (space, money for preservation, staff to care for, etc.) to properly care for the object(s)—even if they fit the scope.
- Other institutions have these objects and they are well-represented elsewhere.
- The object(s) would reach a more appropriate audience and/or be better cared for at another institution.
- The Foundation is in dire financial trouble, and unless some of the collection is sold, the Foundation is in imminent danger of shutting its doors.]

I also recommend that the disposition of the collection be [transfer of custody to another institution/Sale/Return/Destruction]. [Explanation why.]

Respectfully submitted,

[Authorized personnel]

TRANSFER OF CUSTODY AGREEMENT

From: The Postal History Foundation

To:

Date:

The following material and all applicable rights and title to, are hereby transferred to:

From: The Postal History Foundation, as of this date.

Authorization

Released by _____ **Date:** _____

(Print name) _____ **Title:** _____

Received by: _____ **Date** _____

(Print name) _____ **Title:** _____

INCOMING LOAN AGREEMENT

The undersigned ("Lender") hereby places the object(s) described herein in custody of The Peggy J. Slusser Library ("Library") for the purposes, and subject to the terms and conditions, set forth.

Lender

Name (contact person):

Organization:

Address:

Telephone:

Email:

Material Description

Purpose/permissions

The Postal History Foundation has the Lender's permission to use the object(s) for:

☐

Exhibition

☐

Research

☐

Other:

Duration of loan:

Dates: _____ to _____

Transportation:

Responsible for transportation:

☐

Lender

☐

Library

Credit line:

Unless otherwise noted, the object(s) listed above will be credited in exhibition and publication with the statement "Courtesy of [Lender's name]" or "On Loan From [Lender's name]". If a different credit line, or no credit line, is desired, please note below.

Authorization

I have read and agree to the Policies Governing loans listed on this form:

Signature _____ Date _____

Received by authorized Postal History Foundation representative:

Signature _____ Date _____

OUTGOING LOAN AGREEMENT

The Peggy J. Slusser Memorial Philatelic Library hereby lends the object(s) described herein (the "Work") subject to the terms and conditions set forth in this agreement (the "Agreement").

Credit line for the loaned items should read, "Courtesy of the Postal History Foundation."

Borrower

Name (contact person): _____

Organization: _____

Address: _____

Telephone: _____

Email: _____

Material description

Accession number/call number _____

Title/description of Work: _____

Description of condition of item(s): _____

Purpose/permissions

Next to the checked reason, please describe any special events, exhibits, or use.

☐ Exhibition _____

☐ Research _____

☐ Other: _____

Security and Transportation

Where will the item(s) be kept during the period in which it is on loan?

What level of security will be provided?

Special Instructions/Conditions for handling, packing and installation:

The signature below constitutes agreement to the loan of the work under the terms and conditions stated below.

I have read the conditions on both sides of this form and accept them. I agree to replace any lost items like for like (at the discretion of the foundation), or pay the sum of _____ if the items are lost or not returned.

Authorization

I have read and agree to the Policies Governing loans listed on this form:

Signature of lender/Authorized Agent: _____ Date _____

Approved by authorized Postal History Foundation personnel:

Signature _____ Date _____

PERMISSION TO USE AGREEMENT

Materials desired for use

ID/Call number	Collection name	Item name

Proposed Use

Next to the checked reason, please elaborate.

- ☐ Exhibition | Location, Sponsors, Host, Purpose:
- ☐ Publication | Publisher, title, print run:
- ☐ Other | Explain:

Is the use for-profit? (If non-profit, please provide 501(3)(c) identification)

User information

Name (contact person): _____

Organization: _____

Address: _____

Telephone: _____ Email: _____

Policies Governing Publication:

Copyright

The researcher assumes all responsibility for identifying and satisfying any claimants of copyrights and for observing applicable laws regarding intellectual property. The recipient agrees to indemnify and hold harmless the Postal History Foundation, its officers, employees and agents from and against all suits, claims, actions and expenses arising out of the use of reproductions provided by the Postal History Foundation.

Obtaining permission

Permission to publish requires the proper completion of this One Time Usage Agreement form, and approval from the Postal History Foundation.

When permission is granted, the grantee is entitled to a one-time, non-exclusive, use of the item(s) listed. Additional uses must be negotiated and approved before use. Additional use includes but is not limited to: multi-language editions, trade, promotional, packaging, advertising, or use in electronic format, including but not limited to internet or other usage.

Special note on Internet use

Images posted on the internet will have maximum resolution of 72 dpi and be no larger than 600x400 pixels in dimension. The Postal History Foundation reserves the right to remove its images from any website. Proper credits must be placed adjacent to the image, and must include the following link to the Postal History Foundation website: <http://www.postalhistoryfoundation.org/>

Credit line

Credit for manuscript materials and photo collections shall be given as follows: [Name of collection, if applicable]. Postal History Foundation.

Fees

The Postal History Foundation allows usage free of charge until further notice.

Copy of work produced by user

It is the grantee's responsibility to supply the Postal History Foundation with a copy of any book, periodical, DVD, film or other media in which the photograph was published or reproduced. The Foundation must be provided with a website address for image(s) posted on the Internet.

One Time Usage Agreement Form

I have read and agree to the Policies Governing Publication listed on this form:

Signature _____ Date _____

Authorization

Approved by authorized Postal History Foundation personnel:

Signature _____ Date _____

USE OF ARCHIVAL, PHOTOGRAPHIC, AND RARE MATERIALS AGREEMENT

Use in the Slusser Reading Room of Archival, Photographic, and Rare Material

- Patrons may have one item at their tables at a time.
- If using a box with multiple folders, only open one folder at a time and return to the box before getting a new folder.
 - Exception: If you want photocopies, turn the papers/photographs you want copied perpendicular (leaving in the folder) and give to the librarian or library personnel.
- Materials must not be leaned on, written on, folded anew, traced, or handled in any way likely to damage them.
- No marks may be added or erased from any material.
- Do not use sticky notes on materials.

Using Paper Materials

- Patrons must have clean, dry hands. Do not use gloves with paper; it tends to rip the paper.
- Please keep folders in the original order. If you suspect something is out of order or out of place, please alert the librarian or library personnel.

Using Photographic Materials

- Patrons must have clean, dry hands and use white cotton gloves (provided).
- If photographs are in Mylar sheets, do not remove them from the sheets.

Reproductions

- Reproductions (cameras, photocopies) of archival, photographic, and rare material may be made as long as the images are for personal use and if it can be done without damaging the item.
- Entire collections may not be reproduced. Generally, 10% of a collection is permissible. Please see the librarian or library personnel if you have questions.

Signing indicates that you understand and agree to comply with the Slusser Library Use Policies.

Print name

Sign name

Date

IN-HOUSE LOANS

[illegible]

SLUSSER MEMORIAL PHILATELIC LIBRARY BOOK LOAN

Who may borrow?

Postal History Foundation (PHF) **members in good standing** may borrow items from the Slusser Library. Materials may be borrowed only when the Librarian or other authorized PHF staff are available and the borrower's signature is obtained in the circulation ledger. While Slusser Library materials may not be borrowed by mail, selections under fair use may be photocopied and mailed to users at cost.

Loan limits

5 items may be borrowed at one time.

Loan Time

Items are loaned for **1 month** with the possibility of a further month's extension at the discretion of the librarian. Items may be re-called during any loan period if another patron requests the same material. If an item is recalled, the new user will be informed and will have three days to pick up the material.

Late fees

No late fees will be charged, but borrowers who do not return books in a timely manner will have their PHF membership privileges suspended and their borrowing privileges revoked until all items on loan are returned.

Lost or damaged material

If an item is lost or returned damaged beyond reasonable repair, the borrower will be charged for the **replacement cost of the book, plus a \$5 processing fee**. Borrowers may supply a replacement copy in the same edition in good condition for a lost or damaged item in lieu of the replacement fee, and the processing fee will be waived.

Agreement

Below, please sign and date to indicate that you agree to the policies listed above. From now on, you won't be required to sign a similar sheet each time you check out books. (Though you may need to sign similar form again, especially if policies are changed.) Instead, you will be asked to initial, which will represent your signature on this agreement. Here also indicate what initials you will use so that they can be matched up with you.

I understand and agree to the terms and conditions listed above:

Signature

Date

Name (printed): _____

Initials: _____

Telephone number: _____

Email (if any): _____

HOUSEKEEPING SCHEDULE: LIBRARY, ARCHIVES, & MUSEUM

M:					Y:								
Q: 1 2 3 4					M in Q: 1 2 3			Week 1	Week 2	Week 3	Week 4	Week 5	
Monday													
Clean glass (exhibit and glass table)													
Wipe down tables and chair backs													
Wipe down mice and phone													
Wipe down door handles													
Tuesday													
Dust exhibit case & card catalog case													
Wipe down door handles													
Wednesday													
Dust black tv stand/display desk													
Wipe down door handles													
Thursday													
Wipe glass bowls, guest computer													
Wipe down door handles													
Friday													
Wipe down librarian's desk													
Wipe down door handles													

<i>Monthly</i>		<i>Quarterly Dust & Vacuum</i>	
Dust file cabinets in kitchen area		1 st month in quarter: open stacks	
Vacuum kitchen area		2 nd month: closed stacks & stairwell	
Dust Naco Post Office and displays		3 rd month: Cal Peters paintings	

SEPARATION SHEET

Accession number	
Object name	
Home location	
Reason for move	
Temporary location	
Date moved	Initials
Date returned	Initials
Accession number	

*After object is returned, place this sheet in the collection's control file.
If the object has been separated for over a year, investigate and make
any necessary notes on back of this sheet.*

SEPARATION SHEET

Accession number	
Object name	
Home location	
Reason for move	
Temporary location	
Date moved	Initials
Date returned	Initials
Accession number	

*After object is returned, place this sheet in the collection's control file.
If the object has been separated for over a year, investigate and make
any necessary notes on back of this sheet.*

ARCHIVAL COLLECTION BASIC INVENTORY SHEET

Call number	Collection name	Current location	Linear ft	No. of boxes	Condition	Missing items	Staff	Date

Condition scale: 1: Fine or good, no intervention needed; 2: Some mold, foxing or other damage; low priority for conservation; 3) Significant damage, needs conservation as soon as possible

MUSEUM COLLECTION BASIC INVENTORY SHEET

Accession number	Object name	No. of obj	Current location	Linear ft	No. of boxes	Condition	Missing items	Staff	Date

Condition scale: 1: Fine or good, no intervention needed; 2: Some mold, foxing or other damage; low priority for conservation; 3) Significant damage, needs conservation as soon as possible

SLUSSER BOOK LOAN REGISTER

Y:

Q:

[illegible]