



COLLECTIONS MANAGEMENT POLICY

**Stratford Hall
Robert E. Lee Memorial Association, Inc.
2010**

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COLLECTIONS MANAGEMENT POLICY

ROBERT E. LEE MEMORIAL ASSOCIATION, INC.

I. MISSION STATEMENT

Stratford Hall preserves the legacy of the Lee family and its plantation community; inspires an appreciation of America's past, and encourages commitment to the ideals of leadership, honor, independent thought and civic responsibility.

II. SCOPE OF THE COLLECTIONS

The Robert E. Lee Memorial Association collects, researches, preserves, and shares with the public two- and three-dimensional objects in a variety of media that directly relate to the mission of the Association. The Association collects objects used to interpret: the pre-historic inhabitants and landscape of the Stratford property; the four generations of Lees who lived at Stratford from 1738 to 1822, their ancestors, descendants, slaves, indentured servants, tenants, and hired craftsmen and laborers; the pre- and post-Lee periods of private ownership; and the purchase, restoration, and management of Stratford by the Association from 1929 to the present.

The collections at Stratford include:

1. The **Curatorial Collection** consists of objects acquired for the purposes of exhibition or research. Such objects include decorative and fine arts, horse-drawn vehicles, tools and other utilitarian wares, textiles, and personal accessories. The collection also includes objects found within the architectural context (i.e., behind walls and under floor boards).
2. The **Archaeology Collection** consists of artifacts and objects which have been produced or affected by humans and found in the context of the Stratford landscape. The collection covers all periods of time, from the prehistoric to the modern. The artifacts have been acquired from a range of sources including organized fieldwork and single item or spot finds by members of the public.
3. The **Paleontology Collection** consists of fossils and geological specimens which are part of the natural history record of Stratford. The artifacts have been acquired from a range of sources including organized fieldwork and single item or spot finds by members of the public.
4. The **Architectural Fragments Collection** consists of objects removed from their original context during the course of restoration work undertaken to stabilize, protect, or reinterpret the historic built environment of Stratford.

Future expansion of this collection should be planned to include the historic structures built by the Association, including the Council House, Directors' Cabins, and other non-exhibition area structures, as well as other related objects that enhance our understanding of the built environment of Stratford and the Chesapeake region.

5. The **Non-Accessioned Collection** consists of interpretive props and objects for decorative use in Stratford buildings. Interpretive props include modern reproductions of period objects and other related goods. Fine and decorative arts objects used for decorative purposes in Stratford buildings such as the Council House, Cheek Guest House, Astor Guest House, Executive Director's Residence, Jessie Ball duPont Library, or administrative offices include non-accessioned prints and paintings as well as certain pieces of historic furniture and other furnishings. These items are not currently accessioned into the collections and therefore are not guarded by the same regulations as the other collections, but are tracked nonetheless due to their monetary or historic value. Periodic review of the Non-Accessioned Collection is necessary and items may be considered for formal accessioning if deemed appropriate.
6. The **Rare Book and Manuscript Collection** consists of published and unpublished materials from the 17th, 18th, 19th and early 20th centuries which enhance the interpretation of Stratford Hall, the Lee family and their contemporaries, and the administration of the Robert E. Lee Memorial Association. It includes rare books, atlases, manuscripts, journals, pamphlets, and other ephemera.
7. The **Archival Collection** consists of: photographs; slides; paintings; drawings; maps; blueprints; correspondence, reports and ephemera of the Robert E. Lee Memorial Association; digital and film media; and other iconographic materials, in original, non-original or microform versions dating from the mid-19th century to the present, that relate to the Lee family, Stratford Hall, and the administration of the Robert E. Lee Memorial Association.
8. The **Modern Reference Collection** consists of books, periodicals, audiovisual media and microform materials which relate to the Lee family and their contemporaries, Stratford Hall, fine and decorative arts, architecture, historic preservation, collection care and management, and history, with particular emphasis on the political, economic and social history of the Chesapeake Bay region. Materials in this collection are accessioned and cataloged, but, because of their transient nature, are not subject to the provisions and procedures of accessioning and de-accessioning stated in this policy.

III. COLLECTING PLAN

The most important initial criterion with which to evaluate a potential acquisition for the Stratford collections is the object's contribution to research, interpretation and exhibition at Stratford Hall.

Categories of objects are classified into three levels of priority based on their potential benefit to the collections. These categories are used to prioritize collecting activities for the collections.

First Priority:

Objects original to Stratford or its residents during the focus interpretive period of 1738 to 1822.

Objects related to the non-domestic life of the Lee family, including family members' roles as military leaders, politicians, and entrepreneurs.

Second Priority:

Objects original to Stratford or its residents outside of the focus interpretive period of 1738 to 1822.

Objects similar to those that were at Stratford or that replicate objects that were at Stratford during the focus interpretive period, for the purpose of enhancing the interpretation and understanding of the estate and its residents.

Third Priority:

Memorabilia, commemorative items, and other objects that relate to members of the Lee family after their death, to the Lee family's legacy, to the development of Stratford, or to the history of the Robert E. Lee Memorial Association.

Intellectual Freedom: The Library will acquire material reflecting all viewpoints on social, economic, political, artistic, scientific, ethical and moral issues. It supports and adheres to the American Library Association's Bill of Rights and its Freedom to Read Statement. Both documents are appended to this policy in its printed version.

IV. ACQUISITION POLICY: COLLECTIONS

Objects for the Stratford Hall collections may be acquired in the form of gifts, bequests, field collecting, exchanges with other museums, purchases, or other appropriate means.

Stratford Hall/RELMA will not directly or indirectly acquire or exhibit objects that are in violation of international, Federal, state, or local regulations; objects that have an unethical history of ownership; or objects which have been stolen, illegally salvaged, or removed from commercially exploited archaeological or historic sites.

Criteria for Evaluation

Acquisition of objects into the Stratford Hall collections will be considered in accordance with the Collecting Plan and the mission and vision for Stratford. Consideration will be given to exhibition potential, current condition, quality, clarity of title, accuracy of provenance and documentation, and adequate storage and/or staffing to care for the object.

Curatorial Collection

A. General Provisions

1. Priority for acquisition is given in accordance with the Collecting Plan.
2. No object can be expected to be exhibited permanently.
3. Twice annually, at the meeting of Council, the Research/Collections Committee will be informed of collecting activities since the last meeting. Additions to the curatorial collection will be formally recognized by the Committee through the inclusion of a list of acquisitions in meeting minutes.
4. Appraisals of objects in the curatorial collection shall be updated every ten years or as needed.

B. Gifts

1. The Curator shall consider objects for acquisition and recommend acceptance or rejection. Approval for acceptance is given by the Executive Director.
 - a. Upon approval of a gift, a letter of approval and appreciation shall be sent by the Curator, Executive Director, appropriate committee chairman, or President of the Board.
 - b. Upon rejection of a potential gift, the Curator will graciously notify the owner or administrator.

2. Restricted/Unrestricted Gifts

- a. All donated objects are accepted with the understanding that they are unrestricted gifts, without limiting conditions as to their placement, exhibit, or disposition.
 - b. All rights of publication become the property of the Robert E. Lee Memorial Association, Inc. upon acceptance.
 - c. If an object of exceptional rarity or importance to the collection is offered with certain restrictions or provisions, the object may be considered by the Curator for potential acquisition. Any restrictions must be outlined clearly in a legal conveyance and must become part of the permanent object record.
3. A fully-completed and signed Deed of Gift must accompany any gift to the Association.
 4. No member of the staff or Board of Directors may appraise a gift for a donor. Appraisal is the responsibility of the donor.
 5. All donations are tax deductible to the extent allowable under the guidelines of the IRS code.

C. Bequests

1. The acquisitions procedures for bequests will follow those of gifts. With the approval of the Executive Director, the Curator reserves the right to refuse bequeathed objects or to accept only a portion of the bequest.
2. In lieu of a signed Deed of Gift, a copy of the will including all related codicils must accompany any bequest to the Association.

D. Purchases

1. The Curator shall consider objects for purchase and recommend acceptance or rejection. Approval for acceptance is given by the Executive Director and/or Board of Directors using the following standards:
 - a. The Executive Director may approve purchases up to \$50,000.
 - b. The Research/Collections Committee must approve purchases of more than \$50,000. In special circumstances between meetings, an object may be approved by the Chairman after polling committee members, provided funds are available.

E. Accessioning

Following approval of acquisition and transfer of title and physical custody, each object will be formally accessioned and cataloged according to professional museum standards.

Archaeology Collection

The archaeology collection of Stratford Hall consists of artifacts collected during active fieldwork in conjunction with the resulting documentation and assessment. The acquisition and documentation of artifacts is governed by the policies set forth in the Antiquities Act of 1906 (Amended), the National Historic Preservation Act of 1966 (Amended), and the [AAM Standards Regarding Archaeological Material and Ancient Art](#) of 2008. The Robert E. Lee Memorial Association, Inc. will abide by the legal and ethical standards set forth in these policies and will not accept for the collection or actively exhibit any items illegally recovered.

Excavation must be approved in advance by the Executive Director and must be conducted using professional methods and standards of documentation and assessment. The basic unit of acquisition includes artifacts collected, as well as associated documentary and contextual information submitted by the field team or other interested party. The entire acquisition unit will be recorded and maintained according to professional archival and archaeological collections management standards.

The Robert E. Lee Memorial Association, Inc. retains ownership rights to all artifacts excavated from the Stratford property. Per the discretion of the Executive Director, artifacts may be accepted into the archaeology collection from accidental single spot discoveries, but visitors or other parties are prohibited from digging for artifacts unless part of RELMA-approved field work.

Paleontology Collection

The paleontology collection of Stratford Hall is governed by the following policy, approved by the Board of Directors, April 2007:

Ownership and Disposition of Excavated Fossils

The Robert E. Lee Memorial Association, Inc. will retain ownership rights to fossils removed from the Stratford Cliffs. Permission from the Executive Director is required for any excavation of fossils, endangered or not, from the cliffs. Persons proposing to excavate fossils must file an excavation proposal for approval by the Executive Director and sign an insurance waiver before any digging commences. Fossils excavated under this Policy may be placed on loan to other institutions where they must be identified as being owned by RELMA.

Members of the public are allowed to access fossils washed onto the beach within a designated area. While a large majority of these specimens are common and not of scholarly use, Stratford Hall reserves the right to retain scientifically significant specimens for the museum collections. Finds will be credited to the member of the public or staff who makes the find and will be collected under the guidance of a consulting paleontologist.

Architectural Fragments Collection

The architectural fragments collection of Stratford Hall is governed by the *Williamsburg Resolutions on Architectural Fragments*, adopted by the Association for Preservation Technology International, 1995 (Appendix).

Non-Accessioned Collection

Objects for the non-accessioned collection are acquired through the discretion of the Curator in accordance with the Collecting Plan. Non-accessioned collection objects are given a distinct tracking number separate from the accessioned collections.

Rare Book and Manuscript Collection/Archival Collection/Modern Reference Collection

The Jessie Ball duPont Memorial Library is a non-circulating repository for published, non-published and archival materials relating to the Lee family, Stratford Hall, the Robert E. Lee Memorial Association, Inc. and plantation life of the 17th, 18th, and 19th centuries. The Library will be accessible, by appointment, to the public, Board of Directors, staff and volunteers for legitimate research purposes. Outside visitors must sign a register and be informed of special library procedures by a member of the staff.

Archival materials and rare book collection will be stored, conserved, processed, and inventoried in accordance with acceptable professional standards for the field. Anyone requesting microfilming privileges will provide the library with a duplicate copy.

Modern library materials will be accessioned, catalogued, shelved, and maintained in accordance with acceptable professional standards for the field. Lending privileges of designated modern reference materials and periodicals are extended for the Board of Directors, staff, and volunteers. Borrowers must follow established library lending procedures.

The Director of Library Collections is responsible for maintaining the rare book, manuscript, archival and modern reference collections and will perform the same functions regarding those collections as those of the Curator described in Sections V through X in this Collections Management Policy.

V. DEACCESSION

Deaccessioning is the process of removing permanently from the collection accessioned objects which do not meet the criteria of the acquisition policy. Utmost consideration and caution should be exercised in determining objects for deaccessioning. It is the intention of the Robert E. Lee Memorial Association, Inc. that any object(s) acquired for the permanent, study, and service collections shall remain in the collection in perpetuity as long as it retains its physical integrity, authenticity, and relevance to Stratford's mission. An object failing to meet these criteria may be considered for deaccession.

Before any object is recommended for deaccession, reasonable efforts must be made to determine that the Association is free to do so. Legal counsel will be sought should any questions arise

concerning restrictions.

The same committees that recommend acquisition may recommend deaccession.

Only members of the Board, Executive Director, Advisory Panels, and collections management staff may suggest to the appropriate committee that an object be considered for deaccession.

Deaccession may be made through sale, exchange, gift to another institution, or witnessed destruction, but all deaccessions shall have the approval of the appropriate committee and the Board of Directors.

The circumstances of an object's removal must be carefully recorded and placed in the permanent records.

A. Curatorial Information Provided For Deaccession

When an object is to be considered for deaccession, the collections management staff shall provide the appropriate committee with a **Recommendation for Deaccession** form which shall include:

1. Description of the object, including provenance and value.
2. Reason for deaccession.
3. Recommended means of disposal.

B. Procedures for Deaccessioning

After Board approval, object(s) may be deaccessioned under the following procedures:

1. If valuable, large or of many pieces, the object(s) shall be sold through a major international auction house, using the name of Robert E. Lee Memorial Association, Inc. or Stratford Hall Plantation, and included in a published catalog in advance of the sale. The Board of Directors may set a reserve price.
2. If small, insignificant, or not worthy of a major auction house, the object(s) may be sold after two professional opinions as to its value have been obtained, and the object advertised for sale to the public, either through a published catalog or newspaper.
3. An exchange may be arranged with another non-profit institution provided the appropriate committee approves the object to be received and the values of the exchanged objects have been determined.
4. Disposal by witnessed destruction of items presenting an immediate hazard to the rest of the collections and/or staff; items damaged beyond repair; or objects of insignificant value for which an appropriate trade, gift, or sale arrangement has not been made within one year of initial consideration by the appropriate committee.
5. Deaccessioned objects shall not be given, sold, or otherwise transferred, publicly or privately, to the Association's employees, officers, directors, advisors or their

immediate families or representatives.

6. A list of all deaccessioned objects and manuscripts shall be kept current by the collections management staff.

C. Procedures After Deaccession

1. Income from the sale of deaccessioned objects shall be deposited to the appropriate committee's account and used for the acquisition of new objects and the conservation (direct physical care) of existing objects in the collections. Proceeds from the sale of past gifts must be directed as stipulated in the donor's Deed of Gift, adhering to approved deaccession procedures as closely as possible.
2. The original donor or his/her heirs will be notified of deaccession at the discretion of the Board of Directors.

VI. LOANS

Loans are temporary physical transfers of objects without any transfer of ownership to Stratford Hall. Stratford Hall makes loans of objects from its collection to qualified borrowers, and may request loans from other organizations or individuals for exhibition or research purposes.

A. Loans - Incoming

1. Requests for loans to Stratford Hall are made by the Curator and are reviewed with consideration of the object's provenance, its condition, the clarity of rights and title, the presence of lender-imposed restrictions, and the associated costs of the loan. Special conditions or restrictions must be approved by the Executive Director in advance.
2. It is the responsibility of the borrower to ensure that necessary documentation, including required permits, is in place for loans involving objects covered by protective legislation and treaties. Stratford Hall will not borrow objects that are known to have been collected or imported in violation of state, Federal, or international restrictions, or which may otherwise place the Museum in a compromising legal or ethical position.
3. Stratford Hall does not accept incoming loans offered for the purposes of commercial exploitation of the object or to increase its value when sold, nor does it provide long- or short-term storage services.
4. All objects accepted will be covered by the Incoming Loan Agreement specifying the terms, use, insurance, care, and loan dates. The Incoming Loan Agreement must be signed by the lender prior to shipment.
5. It is the responsibility of the lender to provide the fair market value of the loan to Stratford Hall. Stratford Hall reserves the right to require the lender to provide evidence of the object's value in the form of a qualified appraisal. It is the responsibility of the lender to inform Stratford Hall if the stated value of the object changes during the period

of the loan. If requested, Stratford Hall will provide the lender with a certificate of insurance as evidence that insurance coverage is in place for the object on loan.

6. The lender is responsible for informing Stratford Hall in writing if their address or ownership status changes during the loan period. Stratford Hall will return the object to the lender listed on the incoming loan agreement and will only deliver the object to another party with written authorization from the lender.

7. Criteria for Incoming Loans

Requests for Incoming Loans to Stratford Hall must meet the following criteria:

- a. Objects are needed for display or use in educational programs; or for purposes of reference, research, or study. The Incoming Loan Agreement will specify use, estimated time period of the loan, special conditions for display, storage, or study, and insurance terms. Objects on loan to Stratford Hall shall not be loaned to another party without written permission from the owner.
- b. Stratford Hall will exercise the same care with respect to loaned material as it does in the stewardship of comparable property of its own collection. Objects shall remain in the condition in which they are received, and will not be repaired, retouched, or altered in any way except with written permission from the lender.

8. Incoming Loan Procedures

- a. The appropriate staff member, (Curator, Librarian, Director of Preservation, or Executive Director) makes a written request to the lender, with a copy to the Collections Manager.
- b. The Collections Manager is responsible for maintaining a current Standard Facility Report and will provide a copy to the lender upon request.
- c. If the loan is not approved, the Curator retains pertinent documentation in the exhibition file or, when appropriate, in the Stratford/Lee Unowned files.
- d. If approved, the Curator turns all documentation over to the Collections Manager, who executes a loan agreement with the lender, requests a certificate of insurance from the Finance Department, and arranges for packing and shipping.
- e. When the loan arrives, the Collections Manager coordinates condition reporting and photography.

9. Permanent or Long-Term Loans

Stratford Hall does not accept loans with indefinite loan periods. All loans received after this policy has been approved must be placed under an Incoming Loan Agreement with a stated

loan period not to exceed 2 (two) years. The loan term is renewable for additional 2 (two) year periods upon expiration of the initial loan agreement. In special cases, exceptions to this policy may be approved by the Executive Director on a case-by-case basis.

B. Loans - Outgoing

1. Outgoing Loans are only made to museums or related institutions and are never made for personal use or for commercial purposes. Non-museum educational organizations must certify that they are able to provide professional, museum-quality care for loaned objects. Loans will only be made for the purpose of display, study, or reference.
2. Stratford Hall does not make indefinite or permanent loans and the duration of the loan must be specified on the loan agreement. Loans will be made for a period to 2 (two) years or less. If extensions to the initial period are granted, they must be approved under the same stipulations as the original loan and written documentation of the extension must be provided by the Collections Manager. Stratford Hall reserves the right to recall loaned objects on short notice if necessary.
3. All Outgoing Loans are subject to the conditions set forth on the reverse of Stratford Hall's Outgoing Loan Agreement, which must be signed by the borrower prior to shipment of the object. Any special conditions, requests, or restrictions must be discussed with Stratford Hall staff in advance and documented on the loan agreement. Use of the borrower's loan agreement must be approved by the Collections Manager.
4. The borrower is responsible for the cost of any appraisal, conservation, packing, shipping, handling, and insurance costs associated with the loan. The Collections Manager may request a Standard Facilities Report from the borrower. Stratford Hall requires wall-to-wall insurance coverage based on the fair market value of an object for all outgoing loans. Insurance must be carried by the borrower and a certificate of insurance issued naming Stratford Hall as an additional insured or waiving rights of subrogation, or that Stratford Hall will maintain its own insurance at the borrower's expense. Stratford Hall reserves the right to require that the borrower provide written evidence of their ability to pay any deductible limits of coverage.
5. Appraisal values for insurance purposes are based on the fair market value of the object as determined by the Curator.
6. A copy of any relevant condition reports or treatment records and photographs of the object will be provided by the borrower. Damage to or loss of objects must be reported to the Collections Manager as soon as it is discovered. The Collections Manager will maintain related records and coordinate conservation treatment.

7. Criteria for Outgoing Loans

Requests for loans from the Stratford Hall collections must meet the following criteria:

- a. Removal from the collection will not diminish the interpretation of the Great House and out houses, the Library and permanent exhibits, or the grounds.
- b. The object is not judged too fragile to withstand the associated handling, shipping, and changes in climate.
- c. No object may be loaned to a third party by the borrower without written permission from the Robert E. Lee Memorial Association.
- d. The borrower complies with Stratford Hall's standards regarding photography of the objects and credit. Photography is allowed for creation of the public catalog, publicity, and condition documentation only. No commercial use can be made by the borrower or viewing public. Requests for electronic use of images must be submitted separately. Credit must be given to the **Stratford Hall, Robert E. Lee Memorial Association**. For library materials, additional credit must be given to the **Jessie Ball duPont Memorial Library**.

8. **Outgoing Loan Procedures**

- a. Requests for loans must be made in writing to the appropriate staff member (Curator, Librarian, Director of Preservation, or Executive Director) and include a recent AAM Standard Facility Report.
- b. If the object is not available for loan due to previous commitments, the appropriate staff member will inform the requesting party and forward the original paperwork to the Collections Manager.
- c. If the object is available, the Curator, will evaluate the proposed project. If the decision is negative, the appropriate staff member will notify the requesting party and the original correspondence will be forwarded to the Collections Manager.
- d. If the decision is to proceed with the loan, the Curator and the Collections Manager will review the facility report. The Curator will inform the requesting party of any special requirements or conditions, and of any associated expenses. Upon approval of the loan request, the Collections Manager will execute an Outgoing Loan Agreement or approve the use of the borrower's agreement, and will coordinate conservation, condition reporting, photography, packing, and shipping of the object.

C. **Loans – Internal**

- 1. An Internal Loan is a temporary transfer of no more than 1 (one) year of an object to a Robert E. Lee Memorial Association employee for use in their office and other special requests. Loan requests will be reviewed by the appropriate staff member and approved by the Curator.

2. Criteria for Internal Loans

Requests for loans from the Stratford Hall collections must meet the following criteria:

- a. The length of the loan will be specified at the time of the loan, and will generally not exceed 1 (one) year. Requests for extensions should be made in writing to the appropriate Collections staff member.
- b. Loaned objects may not be transferred to another individual or location within the institution without prior authorization from the Collections department. The Borrower will become familiar with all stipulations on the reverse of the Internal Loan Agreement.

VII. INSURANCE PROCEDURES

Coverage for Decorative and Fine Arts Collections

- A. Objects are insured under an all-risk wall-to-wall policy subject to standard exclusions.
- B. Objects are insured for 25% of their appraised value, except for stealable, breakable, and loaned objects which are insured for 100% of their appraised value.
- C. The collections management staff determines which objects are stealable and breakable, and assigns estimated values to objects without professional appraisals.
- D. The collections management staff is responsible for maintaining insurance records and providing copies of the Fine Arts Inventory and Insurance Document to the insurance carrier. The collections management staff must inform the carrier of loans to and from other institutions and removal of objects from the policy.
- E. If objects on loan to Stratford are to be covered under their owner's insurance policy, the owner must supply a certificate of insurance naming the Robert E. Lee Memorial Association, Inc. as the additional insured or waive rights of subrogation.
- F. The insured value of a loaned object is the sole recovery available to the lender in the event of loss or damage.
- G. The Robert E. Lee Memorial Association, Inc. will not be responsible for errors or deficiencies in information furnished by the owner to his insurer or for any lapse in coverage. The owner is responsible for updating insurance coverage in the case of long-term loans.
- H. If no insurance is to be carried, the signed loan agreement shall constitute the agreement of the owner to release and hold blameless the Robert E. Lee Memorial Association, Inc. from any liability for damage to or loss of loaned property.

IX. DOCUMENTATION AND CARE OF COLLECTIONS

The Robert E. Lee Memorial Association, Inc. is responsible for providing adequate fire protection, security, environmental controls, and emergency preparedness plans to protect its collections.

The collections management staff is responsible for the care and daily management of the permanent, study, and service collections. This includes physical records and computerized inventories which are maintained according to museum standards.

The appropriate committees must approve proposed conservation treatments recommended by the collections management staff. Any approved conservation treatment must be consistent with the Code of Ethics and the Standards of Practice of the American Institute for Conservation of Historic and Artistic Works (AIC). Records of conservation treatment will be made by the conservator and maintained by the collections management staff.

They shall maintain storage areas so that all objects and manuscripts are properly stored and preserved. Objects shall be moved in and out of storage areas under the supervision of the collections management staff.

The collections management staff shall supervise packing and arrange transportation of objects which are removed from the premises.

In all cases, the safety of an object will be the paramount consideration in requests for its use.

X. ACCESS AND USE OF COLLECTION

The Robert E. Lee Memorial Association, Inc. assumes a primary responsibility for safeguarding its collections and, therefore, may regulate access to them or records pertaining to them. Control of access to the general public, researchers, and Robert E. Lee Memorial Association, Inc. employees limits the opportunities for unauthorized use, damage, loss, theft, and/or destruction of collections. It also aids in the control of human traffic in collections housing areas.

A. Authority to Approve

Requests are subject to review by the appropriate collections staff member (Librarian, Curator, and Collections Manager as appropriate). Anyone requesting physical access must provide Stratford Hall with a written request explaining the reason for access, and specifying the collection items needed and how they are intended to be used.

B. Responsibility for Monitoring Access and Use

The Curator, Collections Manager, and Librarian are responsible for monitoring access and use of their respective collections.

Any damage done to objects or archives during a visit must be reported directly to the relevant collections personnel, particularly the Librarian for archival materials, and the Collections Manager for permanent collections. No attempt to repair the object should be

made.

C. Access Control

Access to areas other than public spaces is restricted to RELMA staff, students, and volunteers. Security measures are in place for access and reducing harm to the collections.

1. Controlled access includes:
 - a. Notifying the appropriate collections staff member when access is needed to collections areas (Collections Storage, Archives, Historic Area and museum exhibits).
 - b. All collections staff and visitors must sign in and out of Collections Storage in the Visitor Center. The Collections Manager is responsible for maintaining these sign in/sign out sheets in the appropriate files.
 - c. The issuance of keys.
2. The Curator, Collections Manager, and the proper maintenance staff only are issued keys to Collections Storage; the Librarian and the proper maintenance staff only are issued keys to the Archival Closet and rare book cabinets.
3. Transferring or loaning keys to Collections Storage or Archive spaces is prohibited.
4. The appropriate collections staff member must be notified prior to all admittance of non-museum personnel to an area housing RELMA collections.
5. The public portions of the museum may be accessed during regular business hours. Access to non-public portions (collections, research areas, etc.) of the Museum is limited to those persons needing access to carry out their duties. Visitors, scholars, and students who require access to the collection material shall be accompanied at all times by collections staff.
6. All keys must be returned to the appropriate collections staff member at the conclusion of the access period or termination of employment. The collections staff is responsible for ensuring the timely return of keys.
7. Loss or theft of keys is to be reported immediately.

D. Levels of Use

1. Research and Scholarly Access

Physical access to the collections is granted for legitimate research, inquiry, examination by responsible parties, and educational purposes. Access is limited to established hours, professional staff availability, conservation considerations, and exhibit and loan requirements.

Robert E. Lee Memorial Association, Inc. requests copies of any publications resulting from use of the collections. The use of photographic images of the collections is governed by the existing *Photographic Reproduction Rights Agreement*.

2. Archival Collections

Archival records, including catalog and accession records, are the property of the Robert E. Lee Memorial Association and will be treated as public information within the following restrictions:

- a. Requests for anonymity by donors will be honored, but only if this does not obscure the provenance of the artifacts.
- b. Individuals requesting access to acquisition records must so state the purpose of their inquiries. Access will be limited to legitimate and legal inquiry. The Museum is under no obligation to facilitate random searches of the records that are for an illegitimate gain.
- c. Subject to the approval by the Librarian, archival material may be accepted with restrictions on access, when such restrictions are necessary to protect individuals or communities from harm or distress that might be caused by public disclosure of the contents of the documents. All restrictions must conform to accepted standards for public archives and must include reasonable termination dates that do not exceed ten years.
- d. Particular records in the Archives, under the authority of the Board of Directors, are closed to public access and search for an established period of time, usually twenty (20) years. When this period of time is done, it is the responsibility of the Librarian to open these records to research by the general public.
- e. A fee to reproduce documentary materials and photographs will be charged to requestors. No distinction in charges shall be made on the basis of the value or rarity of the original materials. Methods of reproduction may be limited to protect the originals from damage. Policies and fees are outlined in the *Photographic Reproduction Rights Agreement*.
- f. Royalty fees will be charged when deemed appropriate by the Librarian. Conditions related to the copyrights and royalties will be observed for reproductions and reflected in the existing *Photographic Reproduction Rights Agreement*.

3. Exhibition

The Robert E. Lee Memorial Association places original, reconstructed, and duplicated objects from the collections on public display under the following restrictions:

- a. The Curator must approve the use of an object from the permanent collection, must be consulted on the method of installation for the object, and must approve the completed installation of the object in the exhibit. Objects may be removed from exhibit upon the recommendation of the Curator. Proper paperwork, such as a *Request for Object Movement*, must be filled out by the Curator and given to the Collections Manager to facilitate the removal of an object from display.
- b. The Collections Manager maintains responsibility for the care and preservation of objects originating from the collections while on exhibit including the monitoring during movement, environmental controls, objects on loan, security, and pest management.

4. Public Access

Tour groups, members of the public, and the press shall not normally be permitted in collection storage/processing areas. The appropriate collections staff member shall approve in advance and accompany educational tours or classes in collections storage/processing areas.