

The Grundy Archive
Collection Management Policy

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I. Introduction

A. Statement of Purpose

The Grundy Archive (GA) Collection Management Policy is set forth and approved by The Grundy Foundation Board of Trustees and governs all activities relating to the development and use of GA collections. The Policy defines professional standards adopted by the Grundy Foundation and its entities, Grundy Library and Grundy Museum, for the care, handling, registration, and access of objects in the archive and is intended for use by staff, volunteers, and the public.

B. General Responsibilities for the Collections

1. The Library Director provides administrative oversight for the archive and all archive-related staff.
2. The Archivist reports to the Library Director and is responsible for the day-to-day administration of collection-related activities including storage, preservation of objects, and accessibility for other staff, volunteers, and the public.
3. The collection objects are administered and cared for by archive staff in accordance to the policies, procedures, and guidelines outlined in this manual.
4. The Grundy Foundation is the acting custodian for the *Bristol Borough Municipal Records Collection*, tasked with its proper storage and preservation. Access to this collection is determined by the Bristol Borough Administrative Offices.

II. Mission and Collections of the Grundy Archive

A. Mission Statement

The Grundy Archive contributes to the understanding of our local heritage by preserving and making available materials pertaining to the history of Bristol, Pennsylvania and the surrounding communities, as well as the pursuit of local genealogical research to audiences of all ages and interests. In addition, the Archive preserves and maintains records belonging to the Grundy family (which have traditionally been overseen by the Grundy Museum) and the institutional records of the Grundy Foundation, as well as serves as custodian of the Bristol Borough Municipal Records.

B. Purpose and Use of the Collections

1. The collections of GA are maintained to further the mission and goals of the Grundy Library, Grundy Museum, and Grundy Foundation. They may be used in the following manner:
 - a. Study, research and scholarly purposes
 - b. Educational programs
 - c. Exhibitions

- d. Publications that have received permission to publish GA items from the Archivist or Library Director. (Please refer to *Permission to Publish Form* guidelines for more information).
 - e. Loans to other museums, educational, or cultural institutions
2. GA collections may not be used for any purpose that:
- a. Does not relate to the mission of The Grundy Foundation and its entities, Grundy Library and Grundy Museum
 - b. Actually, or potentially, places any object from GA collections in any venue in which the condition of the object is jeopardized, or in which the security of the object is unreasonably put at risk
 - c. Reproduces an object from the collections in a format or in a publication that conflicts with the mission of The Grundy Foundation and its entities, including, by way of example and not limitation, reproduces an object in a manner that is actually or potentially damaging to the public and/or professional image(s) of the Foundation, Library, or Museum.
 - d. Items may not be used for commercial or for profit purpose without prior written permission.
3. The Archivist and archive staff shall determine, in the first instance, whether a proposed use of an object in the collection falls within the above guidelines. In cases in which the archive staff cannot determine whether a potential use falls within the above guidelines, or when there is a disagreement, the Archivist shall refer the decision to the Library Director.

C. Scope of the Collections

The Grundy Archive was originally founded as the Grundy Library's Bristol History Collection to collect, research, document, preserve and share the history of Bristol. The archive fulfills the collecting function of its mission by acquiring artifacts, printed materials, audio-visual materials, and electronic media that relate to Bristol, its history, and its people. By acquiring these items, the Grundy Foundation accepts the responsibility to manage and care for them in the public trust.

While GA Bristol History Collections include objects from the 17th and 18th centuries, the vast majority of the collections date from the 19th and 20th centuries. The collections house materials in a variety of formats including, but not limited to: atlases, books, pamphlets, posters, diaries, letters, maps, photographs, scrapbooks, yearbooks, directories, microforms, records, minutes, memorabilia, ephemera, audio-visual materials, and electronic media. With the exception of a few artifacts already existing within the early collections, GA will not collect items with special housing requirements or three-dimensional objects, except for small, relatively flat objects, such as rulers, pencils, plates, tiles, and commemorative buttons or badges.

The GA also serves as the stewards of the Bristol Borough Municipal Records owned by the Bristol Borough Council. While the GA is not the owner of this collection, they are housed with the Bristol History Collections and kept under care by the GA Archivist.

Additionally, the GA consists of collections that belonged to the Grundy Family, primarily Grundy Foundation founder, Joseph Ridgeway, and his sister, Margaret. These items consist of genealogical, political, and personal records, and traditionally have been under the supervision of the Grundy Museum. Currently, they are closed to the public.

Finally, the GA also includes Institutional Repository Records for each institution within the Grundy Foundation: the Foundation Office, the Grundy Museum, and the Grundy Library.

1. Grundy Archive

The emphasis of this archive is historical and current information about the history of the Grundy Family, the town of Bristol, the surrounding communities of Bristol Township (Edgely, Croydon, and West Bristol), Tullytown, and Burlington Island in New Jersey. Subject areas include but are not limited to: early settlement, immigration, industrial growth and development, transportation, the Delaware River, ethnic groups, families, schools (yearbooks, class photographs, etc.), religious and other local organizations, hospitals, theaters, businesses, properties, and prominent individuals and events.

Please refer to the Appendix on page 15 for a visual breakdown of collection scope.

a. **Bristol History Collections (GA.BH)**

The archival collections of the Bristol History Collection are closed to the public and available by appointment only. They are largely comprised of two-dimensional objects primarily supported on paper that include, but are not limited to books, letters, maps, pamphlets, scrapbooks, deeds, prints, and photographs. There are also a small number of three-dimensional objects of various materials in the collection, including commemorative plates, flags, medals, yardsticks, and other ephemera. In addition to these, there is a small audio-visual collection that includes sound, film, and video recordings. Finally, there are digitized versions of collections and born-digital items made available to the public via Omeka on the following website:

<http://archive.grundylibrary.org>. These primarily consist of photographs. Other digital archives not publicly accessible can be found in the institution's Y-Drive.

- i. **Local History Library Materials:** The open Library collections regarding local, Bristol history are accessible to the public during Library hours and are largely comprised of duplicate material available for local history and genealogy research including: books, pamphlets, and directories. These are Library materials and are not archival. In addition to these items, there is a microfilm collection which includes newspapers and Bristol Borough Council Minutes. Please note that in the Bucks County Library catalog these items are identified within the location of "Local History."

b. The Bristol Borough Municipal Records Collection (GA.BH.1)

In 2006, the Borough of Bristol transferred stewardship of their municipal records including Council Minutes, Ordinances, Resolutions, Justice of the Peace dockets, and surveys, to the Grundy Foundation, Grundy Library, and Grundy Museum. Terms and conditions of the transfer are governed by the “Agreement Among the Borough of Bristol, The Grundy Foundation, and the Bristol Cultural and Historical Foundation, Inc., Concerning the Preservation and Storage of Historical Documents” signed and approved by the Executive Director of The Grundy Foundation on September 29, 2006.

c. Grundy Family Collection (GA.GFC)

The Grundy Family Collection is a closed collection pertaining to the Grundy Family’s genealogical, political, and personal records. Traditionally, these collections have been overseen by the Grundy Museum.

d. Institutional Repository Records (grouped with their respective institutions: GA.M [Museum], GA.L [Library], GA.F [Foundation Office])

The Institutional Repository Records is a closed collection and serves as the repository for inactive records belonging to the Grundy Foundation and its two sub-institutions, the Grundy Museum and the Grundy Library. These records consist of those related to the operational, business, and other functional activities of their respective institutions within the Grundy Foundation and serve as evidence related to such activities. The repository protects these institutions’ records throughout the life cycle, complying with state and federal laws and regulations.

III. Acquisitions

A. Authority

1. The archive staff is responsible for evaluating potential acquisitions for the collections and completing all administrative tasks relating to this process.
2. The Library’s Certificate of Gift form must be completed and signed by the donor and a Library staff member upon the receipt of the object(s).
3. The Archivist is responsible for the final review and approval of all acquisitions.

B. Criteria

1. Potential acquisitions will be accepted if the material directly supports GA’s mission.

2. Objects must have a documented association with Bristol or the surrounding communities, individuals, buildings, businesses, or organizations; or have been made or printed in Bristol or the surrounding communities and clearly marked as such if there is no documented provenance.
3. Objects must not excessively duplicate material already in GA collections.
4. Material collected must be in stable condition, or be able to be stabilized without undue expense.
5. GA must be able to provide adequate housing and care for an object as determined by established, professional standards.
6. GA must be able to provide adequate, ongoing professional care for an object and will not compromise its ability to care for other parts of its collections.

C. Terms and Conditions

1. The owner of the object must have clear and legal title to that object. Clear title must be transferred to GA with the object.
2. Objects must also meet legal and ethical collecting guidelines established by the American Association of Museums and the Society of American Archivists. GA will not knowingly or willfully accept any material when evidence exists that it has been stolen, copied, or illegally imported.
3. In general, GA seeks acquisitions to the collection without encumbrances or restrictions. Any proposed restrictions on donated articles must be approved by the Archivist in conjunction with Library Administration. If restrictions are to be accepted, they are to be clearly stated in the instrument of conveyance, made part of the accession record, and strictly observed by GA.

D. Acquisition Methods

GA acquires objects for its collections through donations, purchases, bequests, or transfers. GA staff is not permitted to provide a financial appraisal of any potential donations.

1. Purchases

Purchases for the collections shall be made from income from specially designated funds, current budget allocations, or specially designated monetary gifts. The following shall apply to all objects purchased for the collection:

- a. Anyone can make suggestions with regard to purchases for the collections.
- b. The Archivist will work in conjunction with the Library Director to approve purchases for the collection.

- c. The bill of sale shall constitute transfer of title for purchased items and will be filed in the accession folder along with supporting documentation.

2. Donations

GA accepts donations to its collections if they meet the established acceptance criteria for new acquisitions. A Certificate of Gift acknowledging transfer of title must be issued for all materials acquired by donation.

3. Bequests

GA encourages bequests, but reserves the right to renounce its interest in property bequeathed to the Grundy Foundation, Grundy Library, or Grundy Museum under a testamentary instrument. Bequests must meet GA acceptance criteria for new acquisitions. Any renunciation of interest must take place within six (6) months after the official notification of the bequest. The following shall apply to all accepted bequests:

- a. A copy of the donor's will and testament will be maintained in the accession folder in lieu of a Certificate of Gift.
- b. Materials donated by an executor from an estate that are not specified in a will are to be treated as a donation from the estate rather than as a bequest.

4. Transfers

GA may accept materials acquired by transfer from the collection of another institution. A Certificate of Gift must be filled out by a representative of the transferring institution.

The GA also accepts transfers of inactive institutional records to the Institutional Repository Collections once active records have reached the end of their life cycle.

5. Materials Found in Collection

Materials as defined as "found in collection" are considered part of GA collections but lack documentation or clear provenance. Any such items shall become property of GA if they have a documented history of being in GA collections for five (5) years or longer and reasonable documented attempts to track down the donor have been unsuccessful. GA may use these items for research and exhibit purposes while possible ownership is being researched. All efforts to establish the source of the materials will be documented in the accessions file.

IV. Deaccessions

A. Authority

1. The final authority to deaccession and dispose of objects from GA collections rests with the Archivist with approval by the Library Director.

2. Deaccessioning and disposal of objects from the collections must comply with all applicable local, state, and U.S. Federal laws in force at the time and must observe any terms and conditions set by the donor when the object(s) was acquired by the Library.

B. Criteria

Objects in GA collections may be considered for deaccessioning for one or more of the following reasons:

1. The material falls outside the scope of the acquisitions criteria or does not support GA's mission.
2. The material is a duplicate or excessively redundant copy of material already in the collection.
3. GA has acquired an example of the material that is in better condition and/or has better provenance.
4. The object has deteriorated beyond a point where it can be reasonably conserved.
5. GA can no longer properly maintain and care for the material according to current professional standards.
6. The material threatens the health or safety of staff, visitors or other collections items and this condition cannot be remedied.

C. Procedures for Deaccessioning

1. When deaccessioned materials are of historic value, GA will make every effort to place them with another library, museum or collecting institution where the material will be accessible to the public.
2. In certain circumstances, deaccessioned materials may be offered to the Library staff for use in programming if it can be clearly established that the items fill a specific need. However, possible usefulness in educational programming shall never be proposed or accepted as the sole reason for deaccessioning.
3. If possible, GA will attempt to return deaccessioned material that is deemed extremely deteriorated or a health hazard.
4. Proceeds from the sale of deaccessioned Grundy Archive collections must only be deposited in the Historical Collection account.
5. Deaccessioned materials will not be traded with, sold, or otherwise knowingly acquired by Grundy Archive staff, board members, collections committee members, or their representatives.

6. Deaccessioned materials destined for sale must only be sold through competitive process at the recommendation of the Archivist and with the approval of Library Administration.
7. All records pertaining to the deaccessioned material will be marked “deaccessioned” along with the date of deaccessioning. The Archivist will maintain these records for GA collections.

V. Loans

GA loans out and accepts loans of material on a temporary basis to support its mission and broaden public awareness of its collections. GA does not usually accept long term loans, nor does it offer materials from its collection for permanent or indefinite loan. Exceptions to this policy must be discussed and approved by the Archivist in conjunction with Library Administration. Loan policies are designed to ensure the safety of all loaned items.

A. Incoming Loans

1. Authority

The Archivist, and if necessary, the Library Administration approves all incoming loans and these loans are administered by the archive staff.

2. Criteria

GA may borrow material from individuals or institutions for the following reasons:

- a. Exhibition
- b. Research, examination or identification
- c. Documentation and publication
- d. Digitization

Items will be borrowed primarily for temporary (up to three months) exhibition purposes and will be returned to their owners in a timely manner at the close of an exhibition. In accepting materials on loan, GA agrees to treat them with the same professional care and consideration that it applies to its own collections and will not attempt to borrow items deemed too fragile to withstand handling and transportation.

While donation of a physical item is always preferred, in the event a donor refuses to permanently donate the original item, the Library will borrow items for digitization purposes if the donor agrees to us making a complete digital version of the item for use in GA’s mission. In this circumstance, the donor is still required to complete a Certificate of Gift form, signing over permission of unrestrained use of the digital version of their item by the Library. If the original item is left with the Library for any period of time beyond the patron’s visit in order to be properly digitized, a loan agreement must also be completed for the time it is in the Library’s custody.

3. Terms & Conditions for Incoming Loans

- a. It is the responsibility of the lender to notify GA promptly and in writing if there is any change of address or ownership with regard to materials on loan.
- b. The Library does not provide insurance coverage for items on loan. The lender may be required to maintain his/her own insurance; each loan will be reviewed on a case by case basis.
- c. If insurance is required, the lender will agree that, in the event of a claim, recovery will be limited to the amount paid by the insurer.

B. Outgoing Loans

1. Authority

The Archivist and, if necessary, the Library Director will act as representatives of the Library in all matters relating to loans from the collection.

2. Criteria

Objects from GA may be borrowed for the following reasons:

- a. Exhibition
- b. Conservation
- c. Research, examination or identification
- e. Documentation and publication

3. Terms & Conditions for Outgoing Loans

- a. All loan requests or renewals will be evaluated on an individual basis and may be accepted or declined by GA for the following reasons:
 - Prior commitment to use the material in a Grundy Archive exhibit
 - Condition of the material
 - Length of loan period
 - State of the exhibition space or environmental conditions at the borrowing facility
 - Other considerations as warranted
- b. The borrowing institution may not undertake any cleaning or restoration work without the express written consent of GA.
- c. The borrowing institution is responsible for monitoring the condition of each item for the duration of the loan.
- d. If deemed necessary, objects on loan will be insured under The Grundy Foundation insurance policy. The Archivist shall determine the value for insurance through research and consultation; if an outside appraisal is required all costs are the responsibility of the borrower.
- e. The borrower will credit GA as the owner of the material on exhibit labels and on any associated exhibit literature.
- f. Approval of any outgoing loan does not include rights to reproduce, publish, or distribute images of Grundy Archive material. The borrowing institution must obtain Grundy Archive permission before any photography, scanning, uploading to the internet, or publication can be undertaken. GA does not grant rights to exclusive use

and reserves the right to publish copies of material from its collections or authorize others to do so.

- g. The maximum loan period for Grundy Archive collection items is one year. Any extensions/renewals must be evaluated on a case-by-case basis.
- h. GA reserves the right to recall items on loan at any time.

VI. Photographic Services

A. Authority

The Archivist is responsible for authorizing and processing all photographic service requests from GA collections.

B. Criteria

Images from GA collections are available for research and publication to the public, non-profit and commercial organizations with permission from the institution.

C. Terms and Conditions

1. Permission to reproduce materials for publication from GA must be secured in writing prior to publication. The *Permission to Publish Form* defines the contract between the client and GA.
2. All reproductions must be credited properly. The general credit line is: "From the Collection of The Grundy Archive."
3. Images supplied by GA may not be altered without special permission.
4. The reproduction of images from printed, analog, digital formats or any existing photographic material not directly supplied to the client by GA is strictly forbidden. GA does not grant permission to publish materials from its collection copied from other published or unpublished sources.
5. In authorizing the publication of any image of any collection or parts of collections, GA will not surrender its right to publish or to grant permission for others to do so.
6. GA reserves the right to limit the number of materials copied, to restrict the use of reproduction of rare and/or valuable material, and to charge a higher fee than specified for materials requiring special treatment.

VII. Insurance

A. Authority

The Grundy Foundation works in conjunction with the Library Director to evaluate all matters relating to the insurance of GA.

B. The Grundy Archive

1. GA currently insures its collections under The Grundy Foundation insurance policies.
2. The Archivist and Grundy Foundation Office staff manage all issues relating to the insurance policy. Maintenance of all records relating to the insurance of the collection is the responsibility of the Grundy Foundation Office.
3. GA does not insure objects placed on deposit for consideration as a gift or potential purchase, nor does it assume any responsibility for the insurance of unsolicited objects left in the temporary custody of the Library staff.

VIII. Access

A. Authority

Access to GA collections is administered by the Archive staff in conjunction with this Policy as adopted by the Trustees of The Grundy Foundation. The Grundy Foundation acts as custodian to the Bristol Borough Municipal Records Collections, and as such, all access requests for that collection must first be approved by Bristol Borough Officials.

B. Terms and Conditions

1. The Grundy Foundation makes every effort to grant access to objects in GA and information about objects in the collection's records. Access is provided to the public through exhibition in the Library's exhibit spaces, electronic exhibits via the Grundy Library website, loans to other educational institutions, and in printed publications.
2. Researchers, scholars, students, and interested members of the public may request to examine or study items in the collection by completing an *Archival Research Consultation Form*. In reviewing requests, the Library balances dual responsibilities for providing access and safeguarding the collection.
3. Patrons unable to come to Grundy Library may request obituaries or newspaper articles in the collection by completing an *Archival Research Request Form*. The Library has indexes for select years of the *Bucks County Courier Times/Bristol Courier*, as well as for several other regional newspapers. If no index is available for the time period of interest, the Library requires a specific date and will search up to two weeks before and two weeks after that date for the obituary/article.
4. There is a non-refundable research fee for certain remote, archive research requests that is determined by staff based upon research time. Additionally, a fee is required for remote obituary requests that need to be completed via microfilm. These fees cover postage and all other related activities for the research request. Research results will not be released until receipt of payment. Number of photocopies and other limitations may apply.

5. The Archivist and, if necessary, the Library Director approves requests for access and are responsible for access to the collections and information contained in collection records. To protect the confidentiality of donors and the security of the collection, access to certain information may be restricted. Individuals given access to the collections and their records must comply with the Library's conditions regarding examination, handling, photography, and the use or dissemination of collection information.
6. Unlimited access to GA and collection records is authorized only to the Foundation Director, Library Director, Community Services Manager, and the Archivist. All Trustees, other members of the staff and authorized visitors may only enter storage areas when accompanied by the Foundation Director, Library Director, Community Services Manager, or the Archivist
7. No food, beverages, or smoking are permitted in any collection storage or exhibition areas, with the exception of official events and receptions held in the Story Room, Learning Center, Exhibit Room, and public areas of the Library. Proper handling of archival materials as dictated by the Archivist must be applied when viewing materials. Only pencils are permitted near archival materials while doing research.
8. Grundy Museum staff who receive approved access to the Grundy Family Collections (GA.GFC) must comply with the rules and restrictions set in the Confidentiality and Nondisclosure Agreement set by the Grundy Foundation.

X. Appendix:

Grundy Archive Collections Scope by Department

