

## HISTORICAL SOCIETY OF HELOTES COLLECTIONS POLICY

### CARING FOR COLLECTIONS

Of all the services that local historical societies perform, none is more important than that of saving from destruction historical records, photographs, and artifacts that document the past. In innumerable cases, only the presence of a local historical society has prevented locally significant historical materials from being carted off to the landfill or scattered in all directions by the auctioneer's gavel. Large institutions, like the Texas Historical Commission, collect many aspects of Texas history, but they cannot collect all the important documents for each region, county, or town.

By saving historical records, historical societies are helping to preserve the collective memory of their communities. We cannot fully understand who we are as a community or as individuals if we don't understand who we were as a community, and what it once meant to be a member of that community. Historical documents can help us to understand and appreciate not only who we are but also how we interact with each other.

Collecting, maintaining, and providing access to historical records involves significant costs. These costs may be incurred in staff time, available space, money, or all of the above. As state-of-the-art conditions are often beyond the limits of many local historical society budgets, our goal is to adhere to minimal best practices, while striving toward ideal practices.

### MINIMAL BEST PRACTICES

1. What the Society wants to collect.
2. What the Society doesn't want to collect.
3. Learning what are already being collected by neighboring libraries, historical societies, genealogical societies, and private collectors.

### IDEAL PRACTICES

1. Create a written collection development policy and update it regularly.
2. House records in secure, safe, separate, space.
3. Have enough funds to acquire, maintain, and make the records available now and in the future.
4. Have a way to reproduce rare or fragile items that can't survive repeated handling.

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**Section 1. PURPOSE AND SCOPE**

- A) Our collections reflect our mission statement: The Historical Society of Helotes is a nonprofit organization with the mission to **collect, study, and preserve the history of Helotes, Texas, the surrounding area and the people who are a part of this area**, as stated in the Society's Certificate of Formation. The geographical area referred to above is limited to the City of Helotes, its Extraterritorial Jurisdiction or ETJ, and the City of Grey Forest and its ETJ. The Society's focus shall be on educating present and future generations on the importance of history and heritage.
- B) The Society will collect historical materials in a variety of formats including, but not limited to: manuscripts, books and other written and printed materials; photographs, prints, paintings, and other visual materials; tapes, recordings, and other oral history materials; equipment, furnishings, clothing and other natural, commercial, institutional, and personal objects of the past.
- C) The Society will accept memorabilia only if it represents important themes or episodes from the community's past. Since the Helotes area was settled by a variety of ethnic groups, records in other languages than English will not be refused. The Society does not collect materials in the following formats: motion picture film, video recordings, and computer files.
- D) The Society may choose not to accept items which are in poor condition, which duplicate similar items in the collection, which are not contemporary with the time period they depict, or which are beyond the scope of this collecting policy. It may also have to turn away donations due to lack of space.

**Section 2. ADDITIONS TO THE COLLECTION**

- A) The Society's historian shall assume responsibility for temporary approval of donations offered to the Society, presenting a report and recommendation to the Board for final approval. In most cases, approval of the report and its recommendations will be routine business similar to the approval of the treasurer's report at a Board meeting. Nonetheless, Board approval of collection acquisitions and disposals demonstrates responsible oversight of the Society's tangible assets just as action on a treasurer's report signifies oversight of financial assets.
- B) All items accepted for the collections must be cataloged and purchases over \$250 must be approved by the Board of Directors. Donations will be accepted only when accompanied by a signed Deed of Gift form (see Section 7) that legally transfers ownership of the materials to the Historical Society of Helotes. Forms must be signed by the donor and an authorized official of the Society. Both the donor and the Society will receive signed copies of the form for their files. Donations are tax deductible under

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Section 501c(3) of the U.S. Internal Revenue Code. Donors are responsible for arranging and paying for their own appraisals.

### **Section 3. UNWANTED MATERIALS**

- A) Items that do not have a historical significance related to Helotes, Texas. An example of an item that would not be included: Long-time Helotes resident Betty Doe wants to donate her late husband Frank's Hawaiian postcard collection. The Society is unable to accept this donation. The Society's collection policy does not allow for items that were owned by local residents, but document other areas of the world.

### **Section 4. REMOVAL AND/OR SALE OF ITEMS**

- A) Disposal of collection items represents the reversal of previous decisions made on behalf of the society. A simple majority of the Board may vote to dispose of items from the collection. In case of disposition of cataloged collection items, any funds generated must be used to benefit the collections.
- B) A record should be created for each item or group of items removed. Included on the deaccession record should be a brief description of the material, the reasons for removal, and information on its new location (if applicable).
- C) Items may be accepted by a majority vote of the Board of Directors solely for the purpose of sale or exchange, provided that the donor is informed of that purpose.
- D) The Society's Board of Directors will have final approval on acquisitions and disposals.

### **Section 5. LOANS**

- A) Loans to the Society are accepted only for a limited time period and only for the purposes of exhibition or research. Loans from the Society are made only for a limited time period, only to non-profit organizations of similar purpose, and only for exhibition or research. Documentation for the loans, including all items, time limit, and signatures of both parties is required.

### **Section 6. RESEARCH REQUESTS**

- A) Inasmuch as the Historical Society of Helotes has no office facilities or research room, researchers cannot be offered access to the Society's collections. In the future, once funds

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and staff can be secured for its implementation, the Society's historical records collection may be available online.

### **Section 7. ACQUISITION -TRANSFER OF OWNERSHIP**

- A) Each transfer of private property should be clearly documented in writing. The written documentation should record the particulars of the transaction, such as the date of the gift and the donor's address for future reference. The documentation, called a Deed of Gift Form, should establish that the historical society has become legal owner of the materials it has accepted.
- B) Deed of gift forms must clearly state that the donor gives the materials listed to the Historical Society of Helotes as an unrestricted gift. This means that the donor cannot determine how the materials will be exhibited, stored, organized, or used in the education mission of the Society. As an unrestricted gift, the Society may retain or dispose of the materials according to the best interests of the organization.
- C) The deed of gift form should always include language stating clearly that the materials being transferred are the legal property of the donor. Such a statement reinforces the intent of the historical society and the donor to enter into a legal and ethical transaction. The form must provide a space for the donor to sign and date the document and a corresponding area for an authorized representative of the historical society (its President) to enter a signature and date.
- D) Two copies of the form should be completed, signed, and dated. The Society keeps one copy for its files and the donor receives the other. The society's copy should be placed in a file organized alphabetically according to the name of the donor. While the donor copy of the form acknowledges the legal transaction, the historical society should always send, in addition, a personal letter signed by the president or director expressing thanks to the donor for the contribution of historical materials.

### **Section 8. DOCUMENTATION**

- A) An inventory list of the Society's collections should be kept by the Society's historian and updated as items are acquired.

*This document was compiled from information obtained by the National Historical Publications and Records Commission and tailored to the needs of the Historical Society of Helotes.*

**APPROVED:** Historical Society of Helotes Board of Directors, October 12, 2021