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**The Presidio Trust Art Collections Manual**

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## Statement of Purpose

The Presidio Trust (“Trust”) is a wholly-owned government corporation dedicated to preserving the Presidio as an enduring resource for the American public. Because the Trust is a federal corporation, art collections donated to or purchased by the Trust are held in public trust; their proper care is necessary to fulfill the Trust’s duty to the public. This Collections Manual (“Manual”) sets out standards that will establish the highest legal, ethical and professional standards for any art collections for which the Trust will have responsibility in the future (collectively, “Collections”). This Manual established protocols that will ensure the Trust fulfills its obligations to protect, manage, provide access to and maintain intellectual control over the Collections and their records. It also establishes legal and ethical protocols for the Trust to follow as it acquires objects for the Collections.

The Collections consist of those works of art that are located throughout the Presidio, which have been donated, commissioned or acquired to enhance the environment of the Presidio and documentation of temporal or ephemeral pieces that exist for a short period. The Trust may accept works of art as donations, for temporary exhibitions and on permanent or semi-permanent loan. The Collections have not been assembled for the same purpose as that of a museum, therefore the Trust reserves the right to address issues concerning the artworks on an individual basis according to its priorities, rather than strictly adhering to the procedures specified by the American Association of Museums. However, the procedures for the acquisition, deaccessioning and care of the Collections will be consistent with the guidelines set down for museum collections whenever possible. This Manual establishes how the Collections will be managed and sets out the criteria of how new pieces of artwork will be accepted for display or acquired in the future.

The purpose of the Collections is to introduce works of art that enhance the visitor experience, are relevant to the history of the Presidio or of California, or are uniquely suited to the Presidio (site specific).

## **Statement of Authority**

### Trust Management

The Trust is governed by a seven-member Board of Directors. An Executive Director reports to the Board and oversees staff with expertise in environmental restoration, historic preservation, operations and maintenance, landscape design, planning, resource management, real estate development, public affairs and programs, law and finance. More detailed information about the Trust and the Trust's managerial staff can be found online at <http://www.presidio.gov/trust/>.

### Collections Director

The Collections are overseen by the Trust's Director of Heritage and Cultural Programs ("Director") who reports to the Trust's Chief Planning, Projects and Programs Officer.

## **Scope of Collections**

The scope of the Collections may include works located throughout the Presidio both in the landscape and within buildings. The Collections may include, but are not limited to, paintings, works on paper, sculptures of all materials, mixed media, ephemera, photography, digital and other media (sometimes individually or collectively, "Objects"). Objects may be used by a variety of audiences including students, professional colleagues, scholars, interns and volunteers. Uses may include exhibitions, education and other outreach activities.

## Acquisitions

The Trust acquires and borrows Objects that further the purpose of and are within the scope of its Collections. For approval of acquisitions and loans, the Trust shall establish the following *Acquisition Procedure*:

- Creation of a review panel that includes Trust staff and art experts (“Panel”);
- Review of potential acquisitions by the Panel; Panel’s recommendation forwarded to the Trust Park Projects and Programs Committee (“Park Committee”);
- Park Committee votes on potential Objects recommended for approval by the Panel; and
- Park Committee recommendation forwarded to the full Board for decision.

All potential Objects are evaluated using the following *Criteria for Acquisition*:

- Objects must be relevant to the Collections;
- Objects must be of excellent quality;
- Objects must enhance the visitor experience;
- Objects must be appropriate for exhibition in a public place;
- The quantity and volume of Objects to be accessioned must be evaluated with regard to long-term Collections management concerns, including material stability, conservation requirements and cost of storage; and
- The donor has provided adequate funds to maintain the Objects in perpetuity.

### Methods of Acquisition

**Donation and Purchase:** Objects from personal collections or deaccessioned by other institutions or from an artist’s body of work. The following criteria apply to donated or purchased Objects:

- The donor must be able to demonstrate ownership;
- The donor must be able to provide clear documentation of provenance;
- The donor must agree to donate the Objects free of restriction, including future use, exhibition or deaccession; and
- Purchase of Objects must include clear documentation of provenance.

**Commission:** All Objects being considered for artist commission by the Trust shall be evaluated using the *Acquisition Procedure* and *Criteria for Acquisition* outlined above.

**Loan:** The following criteria apply to Objects loaned by individuals, institutions or artists:

- The donor must be able to demonstrate ownership;
- The donor must be able to provide clear documentation of provenance; and
- All Objects being considered for loan to the Trust shall be evaluated using the *Acquisition Procedure* and *Criteria for Acquisition* outlined above.

## **Deaccessioning**

The Trust may from time to time decide to deaccession Objects in its Collections.

### **Criteria for deaccession**

- Objects are found to be inconsistent with Trust's mission;
- Objects are redundant; and/or
- Objects are found to pose long-term collections management problems particularly conservation problems.

### **Procedures**

Funds realized from deaccessioning of an Object are normally designated for additional Object acquisition.

- Establish that there are no restrictions that prohibit disposal;
- Obtain an independent written appraisal of monetary value of the Objects; and
- Establish and maintain records of disposal in perpetuity.

## **Preservation**

Preservation of the Collections is a central tenet of the Trust's mission. Professional care of the Collections shall be managed by the Trust and carried out by trained personnel. Preservation of the Collections includes environmental control, integrated pest management, object conservation, disaster preparedness and art handling.

### **Environmental Control**

Selection of the storage facility shall take into account the need for environmental control. The Trust shall monitor temperature and relative humidity of Collections storage and exhibition areas where applicable.

### **Integrated Pest Management**

The Trust shall work with its pest control staff to develop an integrated pest management plan for Collections storage and exhibit areas.

### **Object Conservation**

Conservation needs shall be identified as new Objects are added to the Collections. Priorities shall be established for both preventive and remedial conservation needs. The Trust may work with the Trust Archaeology Lab to oversee specific conservation issues. However, most conservation needs will be met through contracts with outside vendors. Records shall be kept by the Director to document all conservation treatments.

### **Disaster Preparedness**

Ensuring proper care of the Collections is a crucial part of professional, ethical collections management. The Trust is situated in a major urban area and is also located in an environment where earthquakes and other natural disasters, such as flooding and tidal waves, are potential threats. The Trust Archaeology Lab has developed and shall maintain a disaster preparedness plan ("Plan") that establishes preventive measures for addressing natural disasters, and which provides procedures to follow in the event of a disaster, including mitigation measures to resolve threats to the Collections. The Plan shall be applied to the Collections as well. The Plan shall augment but not supersede other life, health and safety plans developed by the Trust.

## **Documentation of Collections**

The Trust is responsible for maintaining documentation relating to the creation, acquisition, character and management of the Objects. This documentation serves legal, research and educational purposes. The documentation maintained by the Trust establishes ownership and demonstrates proper stewardship of the Collections. The Collections management files maintained by the Trust shall document the following:

- Origin and nature of acquisitions;
- Description, condition and inventory of Objects upon accession; and
- Storage location for each Object.

Routine maintenance demonstrates and ensures:

- Professional collection management and collection stewardship.

### **Accession Records**

The permanent record of each Object shall include the following core information:

- Accession Number;
- Description of Object;
- Source and method of Acquisition: gift, bequest, purchase, transfer or exchange;
- Credit Line;
- Intellectual property rights – copyright;
- Location of Object;
- Movement of Object: loan etc.;
- Deeds of Gift for each donation signed by donor and responsible individual; and
- Value.

### **Inventory**

In order to document the Objects in the Collections, the Trust shall conduct routine inventories of its holdings biannually. These inventories establish accountability, ensuring the proper, professional care of the Collections. The inventory provides the Trust with up-to-date information about the Objects, where they are located and their condition.

## **Uses of Collections**

The Collections may be used for exhibition, information dissemination and education. Use of the Collections shall be balanced with the mandate for long-term preservation of the Collections.

### **Exhibition**

Objects may be used in Trust venues. Such internal exhibitions are not subject to the Loan of Objects section of this Manual, but are subject to all procedures of removal from storage. Requests for external exhibition shall be evaluated on a case-by-case basis consistent with the Loan of Objects section of this Manual and shall be approved or denied by the Executive Director.

### **Education and outreach**

Objects may be used for educational purposes.

### **Reproduction**

Requests to reproduce Objects by photographic or digital methods shall be evaluated on a case-by-case basis and shall be approved or denied by the Director. Reproductions shall be financed and arranged by the requester. All reproductions shall credit the Trust in accordance with the Intellectual Property Rights section of this Manual.

## Loans of Objects

Loans of Objects shall balance the need for the preservation of the Objects with the Trust's desire to benefit current and future generations through stewardship, education and research. Loans shall be granted to the extent possible to institutions, while ensuring that the requesting institution has proper procedures in place to ensure the safety of the Objects. Management of the loan process is the responsibility of the Director, who oversees all applications for and administration of loans.

Objects shall not be loaned by the Trust without a fully-executed loan agreement between the Trust and the borrower, except in the case of exhibition in other Trust venues (see the Uses of Collections section of this Manual for more information). All applications for loans must be submitted in writing to the Director at least 60 days prior to the requested initiation date. Applications must include detailed information about the borrowing institution, the purpose of the loan, a proposed loan agreement, the Objects requested, insurance information, and shipping and packing information. Loan agreements shall be approved or denied by the Director. The initial term of the loan shall not exceed one year in length. Loan extension requests must be submitted in writing 45 days prior to the original loan termination date. The Director shall approve or deny extension requests. Objects on extended loan may be recalled at any time with 60 days written notice. The Director shall be responsible for packing, shipping, unpacking, inspecting, preparing condition reports upon arrival and before departure of the Objects. Identification photographs must be made of each Object and retained by the Trust.

Loans Applications shall meet the following criteria in order to be considered for approval:

- The borrower must be a qualified institution. Qualified institutions include, but are not limited, to research organizations, museums and federal agencies;
- The purpose of the loan must be consistent with the Trust's mission and goals;
- The purpose of the loan must be consistent with the Uses of Collections section of this Manual;
- An exhibition plan with specific methodology for handling, transportation and exhibition must be included; and
- The borrowing institution must establish that it is trained in proper art handling.

Loan agreements shall, at a minimum, include:

- The borrower's agreement to comply with the Uses of Collections section of this Manual and follow any guidelines applicable to the intended use of the Objects on loan;
- The borrower's agreement to give credit to the "Presidio Trust" in all published or formally presented work, including exhibitions and conference presentations;
- The borrower's agreement to comply with the policies outlined in the Intellectual Property Rights section of this Manual;
- The borrower's agreement to insure the Objects at the limits specified by the Trust and to assume full responsibility for loss, damage or destruction of the Objects;

- The borrower's agreement not to, under any circumstances, clean, conserve, label or intentionally alter the Objects in any way; and
- The borrower's agreement not to loan the Objects to a third party for any purpose.

## **Intellectual Property Rights**

The Collections are owned and managed by the Trust, an agency of the federal government. The Trust, assumes responsibility for managing the Collections in a legal, ethical and professional manner.

Managing property rights associated with the Collections, including physical and intellectual property ownership, is a crucial step in the management process of the Collections. Appropriately-managed and understood property rights are necessary to provide public access to the Collections in a manner that is mutually beneficial to the public and to the Trust and which allows maximum accessibility to the Collections for public benefit.

The Trust shall attempt to make all Collections and Collections data as accessible to the public as possible, through the development of virtual access such as online catalogs, photo databases and other outreach and educational tools. Advance notice of publication shall be given to the Trust for all documents which make use of materials or data provided by the Trust, or which derive from projects permitted or facilitated by the Trust. "The Presidio Trust" shall receive credit in all documents involving the Collections.

## **Storage and Security**

In order to properly maintain and preserve the Collections, the Trust shall identify a building for storage of the Collections. This building shall have environmental controls, controlled access and an alarm and fire suppression system. In addition, because many of the Objects will be site-specific and located throughout the Presidio, signs shall be created to describe appropriate methods for interaction with Objects. If necessary, simple barriers may delineate appropriate proximity to the Objects.

## **Access**

In general, the Trust will accommodate reasonable requests from museum officials, scholars, researchers and other interested individuals for access to the Objects. Visitors to storage areas shall be accompanied by a Trust staff member. A log of all visitors shall be kept. Photography of Objects for non-publication purposes may be permitted but only under Trust staff supervision.

## **Insurance**

Objects in the Collections are not insured while in the custody of the Trust. When Objects are loaned to other institutions, they shall be insured while in transit and during the loan period. If the Trust agrees to use the borrower's coverage, the borrower shall supply a certificate of insurance naming the Presidio Trust and the United States of America as additional insureds and waiving the right of subrogation.

## **Ethics**

Ethical conduct is an important element of professional collections management, which is meant to complement purely legal conduct. All involved staff, interns, and volunteers (collectively, “Personnel”) shall be educated in and adhere to the following professional ethics regarding collections. Collections ethics education and monitoring is the responsibility of the Trust officer.

All Personnel shall:

- be trained in proper handling and care of collections.
- understand and enforce the security of the collections.
- understand the balance between public accessibility and preservation.
- not knowingly or intentionally damage, destroy, or endanger Trust collections.
- not, under any circumstances, provide authentication or appraisal services for non-Trust collections.

No Personnel shall seek personal monetary profit from any disposal or deaccession of Objects.

## **Financing Collections**

Financing for purchasing Objects can come from a number of sources – from the Trust budget, from grants and from individual gifts. In general, most Objects shall be secured without the use of Trust funds.

### Appraisals

Donations are tax deductible to the extent allowed by law; however, the Trust cannot appraise items for a private owner. Donors shall secure independent appraisals for works of art before making a donation.