Oregon Shakespeare Festival Archives
Access Policy

The Oregon Shakespeare Festival has the two-fold mission of documenting the history of the Oregon Shakespeare Festival (OSF) and providing access to these documentary collections. The Archives provides open and equitable access to its services and the records in its care without discrimination or preferential treatment, and in accordance with legal requirements, institutional policies, and donor agreements.

The Archives of the Oregon Shakespeare Festival contains original material in both paper and audiovisual formats primarily dating from the Festival's founding in 1935 to the present. Earlier items within the collections include primary-source records documenting the Chautauqua era on this site, which dates from 1893. The collections include information relating to both the business and the artistic side of the organization and many are one of a kind.

I. User Communities

1. The Archives Department makes its resources and services available to OSF employees the general public. No special permission or letters of introduction are required.

2. First-time researchers must fill out an "Archives Registration Form" (Appendix A.)

II. In-Person Access

1. Anyone wishing to visit the Archives must do so by appointment. They may do so by contacting any of the following Archives staff members:

   Debi Griffith, Records and Reference Archivist
   Phone: 541-482-2111 ext. 266
   kitl@osfashland.org

   Maria DeWeerdt, Lead Archivist
   Phone: 541-482-2111 ext. 243
   mariad@osfashland.org

   Gwyn Hervochon, Processing Archivist
   Phone: 541-482-2111 ext. 229
   gwynh@osfashland.org

   Archives office hours are from 9 a.m. to 5 p.m., Monday-Friday.

2. All requests for an appointment should include the following information: a description of your project, an idea of the materials you are looking for, and how the materials will be used. Requestors should provide complete contact information, including the preferred means of contact.

3. To protect and ensure the continued accessibility of its collections, all materials must be used according to the "Guidelines for Handling and Care of Collections" (Appendix B.)

4. Use of personal copying or photographic equipment is generally permitted, providing such use is discussed in advance with the staff, does not endanger the records being copied, and does not disrupt other researchers' quiet study. Use of all such equipment must be approved by the Archives staff.

5. The Archives may limit the access of an individual who has demonstrated such carelessness or deliberate destructiveness as to endanger the safety of its collections, or violated its policies and regulations.

6. The Archives reserves the right to deny access to originals whose physical condition or format makes them unstable. If the condition of the original is compromised, access is restricted to an existing duplicate. However, limited access to the original may be allowed if duplication is not possible.

III. Remote Access

1. The Archives will provide remote access to archival materials through mail, e-mail and the Web. Material may be provided through photocopies, digital scans, an attachment to email, and links to web pages.

2. The Archives facilitates the accessibility of its collections by informing researchers about their existence. This is accomplished through online catalogs, inventories and other finding aids, Web sites, and the assistance of staff members.

IV. Limitations on Access

1. The Archives is committed to preserving OSF records and manuscript collections and making them available for research as soon as possible after receipt. At the same time, OSF departments may have a legal, institutional, or other obligations to restrict access to some collections or parts of collections. The Archives will inform researchers of the conditions governing access to its collections.

2. OSF departments may specify whether records transferred to the Archives may be freely used by other persons or restricted in their use. The Archives will refer requests to access restricted departmental records to the relevant OSF department.

3. Donors may impose reasonable restrictions with specific time limitations on collections donated to the OSF Archives. Such restrictions must be documented in statements of gift. Donors are allowed to access collections that they have donated and restricted. Donors may also grant access to restricted materials to others; such permissions must be submitted in writing by the donor to the Archives staff.

4. Restricted records are closed for research purposes. The Archives will not redact restricted records unless it is expressly permitted to do so under terms specified in transmittal documents (in the case of organizational records) or statements of gift (manuscript collections).

5. Unprocessed archival and manuscript collections are generally considered open for research, provided they are not restricted. However, the Archives may need to delay access for a reasonable period of time to inventory the records or stabilize fragile materials.

6. Videos of OSF productions (commonly called "understudy videos") are restricted to OSF employees, and serious researchers whose project has been pre-approved by the Archives staff. These videos are for viewing only, and **copying is prohibited**. Production videos may be viewed by appointment in the Archives, in the Quiet Green Room, or another OSF location with suitable equipment. **They may not be taken off of the OSF campus.** If they are not viewed in the Archives, it is the responsibility of the company member/researcher to return them in the same condition in which they were taken.

V. Reference Services

1. Copying and Scanning Services – The Archives facilitates access to its collections and the information they contain by providing copying and scanning services. Resources permitting, the Archives will conduct a limited amount of copying on behalf of researchers, and reasonable fees will be charged for this service. All copies—whether made by department staff or researchers—must be made in accordance with copyright law, departmental procedures, and concern for the physical preservation of the records. Requests may be submitted using the "Request for Reproduction" form (Appendix C.)

   The Archives utilizes the following fee schedule:

Letter and legal-size photocopies	$.10 per copy
Computer printout	$.10 per printout
Computer printout, color	$1.00 per printout
Scan	$.50 per scan
Compact disc	$5.00 per disc
Fax, sending	$.05 for every two pages, plus the copy/printout cost

   * Please note that the Archives will bill for these services only if they exceed $2 for photocopies or printouts, and $5 for scanning.

2. Research Services – Resources permitting, the Archives will conduct a limited amount of research on behalf of researchers. The Archives reserves the right to charge a fee of up to $25 per hour for research it deems extensive.

3. Permissions for Publication and Exhibit – The Archives does not charge individuals for their personal use of copies from our collections (e.g., a photographic print acquired for home decoration). However, OSF requires written permission for any public use of its holdings or copies of our holdings. Permission for the publication, exhibit or other public use of Archives images, collection items, or copies thereof must be granted by the OSF Media &

Communications Manager. Requests may be submitted using the "Application for Permission to Publish or Exhibit" (Appendix D.)

4. Citation Format – The Archives will provide to researchers a suggested form of citation crediting the repository and identifying items within its holdings (see "Citation Guide for OSF Primary Sources," Appendix E.)

VI. Loan of Materials

1. Organizational records transferred to the Archives may be temporarily or indefinitely returned to the department of origin for administrative or legal use following established guidelines (example: an actor or designer returns to the company after many years; files pertaining to the employment of that particular person would then be returned to the Human Resources office.) Nevertheless, the Archives strongly encourages departmental staff to use records in the Archives' reading room instead of having them returned, or to create reference copies when the information is required for an extended period of time.

2. The Archives permits internal loans of materials to OSF departments or employees. Requests to borrow materials should contain the following information: the purpose of the loan, description of the material requested in as much detail as possible, where the material will be housed during the loan, and when it will be returned. Archives items should not be taken off of the OSF campus without the express permission of the Archives. We encourage the timely return to the Archives of these items.

3. Collections may be temporarily transferred from the Archives for research or exhibition under terms agreed to in a loan agreement between OSF and the borrowing organization. Requests for loan should be submitted to the Archives staff. All loans must be approved by the OSF Executive Director and the Director of Marketing/Communications in consultation with the Lead Archivist.