

# **Oregon Shakespeare Festival Archives Collections Policy**

## **I. Introduction**

### **A. Contents and Purpose of the Collections Policy**

This policy outlines the goals for further development and stewardship of the historical collections of Oregon Shakespeare Festival. It provides a glimpse of past collecting efforts, as well as a guideline for future development of usable and consistent historical collections. The plan and supporting policies articulate what is collected, along with the methods and criteria for collecting. The plan also outlines policies that are critical to managing the historical collections of the Oregon Shakespeare Festival.

The passage of time, evolving company strategy, and shifts in public interest generate new needs for and uses of historical research. Archives collecting and documentation efforts, though guided by existing policy and past experience, must respond to these shifts and the corresponding patterns of records use and requests for information.

In anticipation of these changing future circumstances, this collections plan is to be considered a living document. It is to be reviewed annually by the Collections Committee. Criteria to be detailed later in this document, however, will play a continuing role in developing and administering a usable and meaningful collection.

### **B. Oregon Shakespeare Festival Archives Mission Statement**

The Oregon Shakespeare Festival Archives preserves, protects and perpetuates the heritage, history and creative vitality of the Oregon Shakespeare Festival.

### **C. Oregon Shakespeare Festival Mission Statement**

Inspired by Shakespeare's work and the cultural richness of the United States, we reveal our collective humanity through illuminating interpretations of new and classic plays, deepened by the kaleidoscope of rotating repertory.

### **D. Oregon Shakespeare Festival Vision Statement**

OSF will balance its roles as a major arts organization, national leader and preeminent resource for the theater field, with being nimbly responsive to challenges and opportunities, both artistic and economic. Anchored by an inspired company creating exceptional art, we will be guided by thoughtful resource stewardship and a deep commitment to education and audience engagement.

### **E. Oregon Shakespeare Festival Goals**

Art Goal: We will create great art through extraordinary productions of Shakespeare and other world classics and contemporary plays, a multi-faceted new play development program and a well-supported environment for resident and guest artists.

Engagement Goal: We will engage and serve increasingly diverse new and returning audiences, students, teachers and emerging theatre practitioners, connecting them through compelling experiences to the transformative power of theatre.

Company Goal: We will all make the Festival a great place to work, collectively responsible for being a collaborative company united in its commitment to inclusion and a passionate belief in our mission.

Stewardship Goal: We will be thoughtful stewards of the Festival's available resources, lessening our impact on the planet and launching a major capital campaign to meet our financial and space needs.

## **F. Description of the Collection**

The permanent collection items are retained because of their relevance to Oregon Shakespeare Festival history and/or because they are of high value to the OSF mission (value is defined by the Society of American Archivists as "The ongoing usefulness or significance of records, based on the administrative, legal, fiscal, evidential, or historical information they contain, justifying their continued preservation.") The permanent collection is treated with the highest level of security, environmental protection and handling guidelines possible provided by Oregon Shakespeare Festival staff.

The Archives of the Oregon Shakespeare Festival collects material in the following areas:

- Photography – Photographs produced by Company photographers, or photographers under contract with OSF; OSF-related photographs. All photographic formats collected.
- Company-produced patron, member, public and employee publications - souvenir programs, company newsletters, *Stories of the Plays*, *Illuminations*, newsletters, annual reports, *Clarions*, weekly schedules, attendance reports, etc.
- Marketing ephemera – Production and event flyers, press releases, membership mailings, playbills, postcards, posters, education program materials, etc.
- Audio – Audio of plays, interviews, PSAs, broadcast specials, events, production cue tapes, special effects, concerts, music for the shows, etc. All audio formats collected.
- Moving imagery – Understudy videos, documentaries, news coverage, etc. All formats collected.
- Oral histories – Audio, video and print transcripts of interviews with firsthand witnesses and participants in key moments of the Oregon Shakespeare Festival.
- Production records – Production prompt books, text bibles, prop lists, costume bibles, sound cues, light cues, dramaturgical information, etc.
- Organizational records – The non-active business records of all OSF departments and affiliated organizations: meeting minutes, legal contracts, financial records, insurance records, personnel records, property and facilities records, correspondence, etc.
- Personal collections – The personal papers of OSF administrators, staff members, performers, directors, designers, etc. The collections should relate their involvement with OSF, or the span of their career when a substantial proportion involves OSF.
- External coverage – News clippings, reviews, journal articles, dissertations, books, etc.

## **II. Acquisitions**

Records and objects may be added to the collection by means of gift, purchase, exchange, bequest, or any other transaction by which permission for use of object is transferred to the Archives. All objects accepted into the collection become the property of the Oregon Shakespeare Festival.

### **A. Acquisition Goals**

The Archives and its ongoing collecting activities provide crucial material, research support, and research services to the Oregon Shakespeare Festival, key stakeholders, patrons, members and researchers. The Archives has two separate and equally important collecting goals:

- The OSF Archives seeks to acquire materials that support the Oregon Shakespeare Festival's mission and goals. Acquisitions should support OSF artistic endeavors, marketing, public relations, education programs, product development, fund raising, legal and financial interests, and exhibits.
- The OSF Archives also seeks to acquire materials that document the history and heritage of the Oregon Shakespeare Festival, with the goal of preserving and disseminating the overall historical record for posterity.

### **B. Acquisition Criteria**

A number of specific criteria are considered when a collection or item is made available to the Archives. The acquisition goal is not to acquire all items related to the Oregon Shakespeare Festival and Shakespearean drama, but to take the following various factors into account when considering the acquisition. These criteria are:

- Significance – the item(s) are important and have meaning for Oregon Shakespeare Festival.
- Authenticity – the item(s) are original as represented.
- Uniqueness – the item(s) are exceptional and distinctively characteristic of a class of materials or period, and/or not duplicated in the existing collection or readily available elsewhere; moreover, considered item(s) that already have *similar* specimens represented in the Archives' holdings in either characteristics or time period may be considered duplicative; this principle applies to documents, such as newspaper clippings and other secondary sources that are duplicated in numerous other holdings.
- Accessibility – there are no restrictions on the use of the item(s); the ownership, intellectual property rights, copyright or trademark do not impose limitations on access or fair use.
- Relevance – the item(s) are consistent with our collecting goals.
- Quality – the item(s) are superior examples of their type, class or condition, or the best possible examples available for acquisition.
- Informational value – the item(s) contain information, documentation, or visual imagery that supports Archives research or other areas of stakeholder support;
- Completeness – the item(s) are intact and as originally produced, or, if not, contain materials whose rarity or uniqueness argue for their acquisition;

- Condition – the item(s) are in reasonable and usable condition, or, if not, their rarity or uniqueness outweighs preservation or conservation concerns.
- Potential use – the item(s) have potential use for research, exhibition, loan, education or exchange.
- Care – adequate resources (space, staff and facilities) are available for providing proper storage, management and care of the acquisition without compromising the rest of the collection.
- Cost of upkeep – the cost of conservation, storage, and maintenance is equal to the benefits of having the item(s) in the collection.
- Purchase price – the purchase price is in line with current market values.
- Legal title – OSF is able to establish clear and legal title to the acquisition and can ensure that the acquisition is legally obtained, imported or exported.

## C. Methods

1. Gifts - The Oregon Shakespeare Festival is a non-profit organization. Gifts to the Archives are considered to be charitable contributions, and therefore tax advantages are available to donors. The Archives will not make, arrange or pay for appraisals of donations. Archives staff may provide names of independent appraisers when asked; in this case, staff should provide at least two or more names without preference. Informal verbal appraisals may be shared with potential donors only under certain circumstances, at the discretion of the Lead Archivist. All donations are documented by the Archives' Deed of Gift form (see Appendix B.) Gifts and bequests should be unrestricted whenever possible. Archives may accept restricted gifts in the following two categories: 1) Archives staff may be allowed to use the item internally for research or reference with no commercial use allowed, and 2) Archives may enter into non-exclusive license agreements with donors of items who maintain existing copyright, as in the case of moving images, photography or some digital images. Any restrictions requested by the donor must be agreed upon by Archives staff before completion of the donation, and will be carefully recorded. Partial gifts and fractional gifts may be accepted only if a written statement of intent requires the donor to transfer the item within a specified period of time. Promised or deferred gifts will be accepted only under terms of a written contract.
2. Internal Company Documents and Artifacts - Oregon Shakespeare Festival Lead Archivist uses records management principles to ensure that desired items can be reviewed for potential acquisition after their retention period has ended. A records retention schedule is being developed, and will be reviewed on a regular basis to make sure that it is current and meets Archives' informational needs. The Archives is offered company records and artifacts by various departments on an on-going basis. Decisions for accepting this material into the collection will be made by the Archives staff.
3. Bequests – The OSF Archives is under no obligation to accession items that are bequeathed to it. The Archives will only accept bequests that conform to the collecting plan.
4. Purchases - The Archives staff may purchase items for the Archives collection. Acceptable vendors include private individuals who offer items for sale, the on-

- line marketplace (e.g. eBay,) and live public auctions. Archives staff will ensure that purchase prices are reasonable and in line with fair market value by comparison of similar sales in the collector market, or through consultation with third parties. This process ensures that Archives purchases do not unfairly inflate market values of theater and Oregon Shakespeare Festival documents and artifacts. When requested and agreed upon by all concerned, the Archives maintains seller/donor confidentiality.
5. Exchanges - The Archives may exchange artifacts with institutions or individuals. Exchanges are done on an extremely limited basis. Exchanges will conform to procedures described above for other acquisitions (Section II, C, #1-4.) A written agreement must be completed between the Archives and the other party describing what items will be transferred, the value of goods, statement of provenance, who will pay for packing and shipping, and time frame during which transaction will occur.

#### **D. Procedure**

The recommendation to accession shall be made by the Archives staff by means of a written Acquisition Proposal (Appendix D) that enumerates the justification for accessioning, based on the criteria described above. The recommendation must address the object's provenance, cost/value, and method of acquisition. All recommendations for acquisition should be forwarded to the Lead Archivist. In case of purchases, authorization will conform to established budget limits.

#### **F. Collections Committee**

The Collection Committee is a standing committee consisting of members of the Archives and OSF staff. This committee will convene biannually to discuss current and future acquisitions and collections management issues. It will also meet as needed to discuss unique issues that arise, such as loans to and from the Archives, insurance, or other special considerations (such as high-value purchases; acquisitions that may warrant unusual storage or preservation considerations; space and funding issues; and items that may not necessarily fit with the Collection Development Policy.) This committee consists of the following staff members:

- Lead Archivist
- Records and Reference Archivist
- Processing Archivist
- Director of Marketing and Communications
- Director of Development
- Other at-large OSF staff

#### **G. Policy on Unsolicited Donations**

Only Oregon Shakespeare Festival Archives staff has the authority to accept objects/documents for consideration. The Archives does not accept donations at the reception area, nor at Festival events. The prospective donor will be encouraged to contact the Lead Archivist preferably in writing, to establish a secure process for

handling the item and proceeding with the potential acquisition. Unsolicited donations that are waiting processing will be documented by Archives staff with a Temporary Custody Receipt form (Appendix C.) All unsolicited items received through the mail must be forwarded to the Lead Archivist. If it is decided that the unsolicited donation will be not be accepted into the collection, the donor will be notified via registered mail indicating that, unless other arrangements are made, the object will be returned in the same manner as received.

## **H. Documentation**

Each acquisition is documented and processed in a timely manner. The Lead Archivist is responsible for accessioning, processing and cataloguing items following written guidelines. Catalog entries will be made directly into the Archives database. The information recorded for each acquisition includes the date of receipt into the collection; method of acquisition; name and address of donor or vendor; description of item; volume/dimensions; value or purchase price; storage location; and any condition notes. Written documentation pertaining to legal status, provenance of items, condition and description (e.g. invoices, titles, deeds of gift, copyright agreements, photographs) is kept in the acquisition file. Digital images may be included in the database record.

## **III. Deaccessioning of Existing Collection Pieces**

### **A. Goals**

The term “deaccession” shall refer to the formal process by which an object is removed from the Archives permanent collection, and is separate from the method of disposal.

The OSF Archives maintains the position that the Archives must be free to improve the quality of its collection through prudent deaccessioning, with the understanding that deaccessioning must be undertaken with extreme caution in recognition of its seriousness and permanence. Deaccessioning must never be undertaken with the sole purpose of generating income. Deaccessioning will be limited and highly selective, and subject to serious consideration of the relative quality or importance of an object. Thorough deliberation and justification must be observed at each step of the process.

### **B. Criteria:**

An object under consideration for possible deaccessioning must meet one or more of the following criteria:

- The collection/item falls outside the current stated collection goals and mission of the Archives
- The collection/item duplicates another in the collection
- There exists an over-representation of the material/subject matter/type of item within the collection
- The collection/item lacks sufficient historic merit and it unlikely to be exhibited or used for teaching

- The collection/item has deteriorated to such poor physical condition that it is not possible or practical for it to be adequately conserved, or its restoration would be so extensive as to destroy its integrity
  - The collection/item is accidentally irreparably damaged
  - The collection/item poses a health or safety risk to the collection, staff, or public
  - A clear determination has been made that OSF Archives does not hold full and clear title to the collection/item
- The collection/item proves to be inauthentic
- The collection/item requires on-going collection care that is beyond the capability of the budget and/or other resources of the Archives.

### **C. Methods of Disposal:**

In selecting the means of disposing deaccessioned items, priority will be given toward maximizing the advantage to the organization without compromising the organization's values and ethics. Acceptable methods:

1. Sale - Sale at a well-publicized public auction or the Tudor Guild Gift Shop is favored over consignment to a reputable dealer, as fewer private interests are served, and the likelihood of favoritism or the public's perception of favoritism is minimized. Consignment to a dealer may be selected over public auction or Tudor Guild sale after examination of the advantages and yields of each method and the best interests of OSF.
2. Witnessed Destruction - The physical destruction of a collection/item is permitted when the physical condition is so severely deteriorated that the integrity is irrevocably compromised. The physical destruction must be witnessed and thoroughly documented.
3. Exchange – A collection/item may be transferred to another institution when the item would properly fit into their collection policy.
4. Transfer to a more appropriate department within OSF - When a collection/item is proposed for deaccessioning that is more appropriate to the mission of another department, it may be transferred to such department with the restriction provided that the object be offered back to the Archives prior to any subsequent reassignment.

### **D. Restrictions**

OSF Archives may not deaccession items in violation of terms previously stated in original deeds of gift without express written approval from the donor or through court action. A deaccessioned object may not be given or sold directly or indirectly to OSF staff, or outside experts whose opinions are sought in connection with the deaccession proposal, or their immediate families or representatives.

### **E. Procedure:**

The recommendation to deaccession shall be made by the Lead Archivist. The Lead Archivist will propose a collection or item for deaccession using a "Record of Deaccession" form (see Appendix F) that enumerates the justification for deaccessioning, based on the criteria described above. The recommendation must address the object's

ownership status and propose a method of disposal. One individual must never make the decision to deaccession and the choice of a method of disposal. The Lead Archivist shall seek the opinion of at least one other staff member or outside expert, whose comments and recommendations will be included in the written deaccessioning proposal. The deaccessioning proposal shall be reviewed and consensus reached at a Collection Committee meeting. If a deaccessioned item that was acquired as an unrestricted gift is to be sold at public auction or the Tudor Guild, Archives staff will make every reasonable effort to notify the donor or heirs of the opportunity to purchase the item.

#### **F. Authority:**

The Collection Committee must approve all deaccessions.

#### **G. Use of Deaccessioning Proceeds:**

All funds realized in the sale of a deaccessioned object must be used for the purpose of acquisition of collection items or the care and management of the Archives collection.

#### **H. Documentation**

Detailed records will be maintained throughout the entire deaccessioning and disposal processes. Records on deaccessioned items will be kept permanently in the Archives.

### **IV. Loans**

The Oregon Shakespeare Festival Archives is working to create an incoming and outgoing loan program to encourage and expand research activities. These loans will play an important role in fulfilling the OSF mission to engage, educate, encourage scholarship, build community and pursue creative excellence.

#### **A. Incoming Loans**

Items loaned to the Archives will be consistent with its mission and activities and use of the permanent collection. The Archives will only accept objects on loan that will withstand the rigors of handling, travel and display without damage, and will meet the lender's environmental, security and legal requirements. Issues of provenance, copyright and rights of privacy will also be considered. All loans will conform to pertinent local, state, federal and international law.

The Oregon Shakespeare Festival Archives will also accept incoming loans of historical documents and artifacts for the purpose of reproduction for historical collection and research. Each incoming object will be treated in accordance with the general handling guidelines of the Oregon Shakespeare Festival Archives (see Appendix H.)

Decisions on incoming loans to the Archives will be made by the Archives staff as appropriate. The specific terms of each loan (such as duration, insurance responsibility, costs or conditions) to the Archives will be stated in a written loan agreement to be signed by both parties (the "Incoming Loan Agreement" is located in Appendix I.) The Lead Archivist is the authorized contact on behalf of SOF to finalize these arrangements.



All loans must be approved by the OSF Director of Finance and the Director of Marketing/Communications in consultation with the Lead Archivist.

No item on loan to or from Oregon Shakespeare Festival will have conservation actions taken on it without written agreement from both parties.

The Oregon Shakespeare Festival Archives departments do not accept “permanent” loans from outside parties.

## **B. Outgoing Loans**

The Oregon Shakespeare Festival Archives may loan original collections or items to outside institutions for exhibit, scholarly use, or educational use. All requests will first be placed with OSF’s Lead Archivist. See the Outgoing Loan Agreement (Appendix E) for specific criteria, approval procedures, and conditions. The specific terms of each outgoing loan (such as duration, insurance responsibility, costs and other conditions) will be stated in a written loan agreement to be signed by both parties (see Appendix E, “Outgoing Loan Agreement.”) The absence of the loaned item(s) must be deemed by Oregon Shakespeare Festival to have minimal impact on the research needs of OSF Archives stakeholders. All loans must be approved by the OSF Executive Director and the Director of Marketing/Communications in consultation with the Lead Archivist.

The Oregon Shakespeare Festival Archives will loan items to other departments within the Oregon Shakespeare Festival for display or research purposes. Arrangements for internal loans will be made by the Archives staff. Final approval for internal loans will be made by the Lead Archivist.

## **C. Unclaimed Loans left in OSF Archives Custody**

In the case of unclaimed loans left in the custody of the Oregon Shakespeare Festival Archives, the staff will make every effort to notify the lender to arrange the return of collection or item. Oregon Shakespeare Festival Archives staff will review collection records and other pertinent information to find the original lender or heir. If the Archives’ efforts to return loaned property within a reasonable period following the termination of the loan are unsuccessful, then the loaned property will be maintained at lender’s expense for a maximum of one year. If after one year the loaned property has not been claimed, then and in consideration for maintenance and safeguarding, the lender or any subsequent owner shall be deemed to have made the loaned property an unrestricted gift to the Archives.

## **D. Objects Left in Temporary Custody**

Examples of items left in the temporary custody of the Oregon Shakespeare Festival are items under consideration for acquisition or loan; research; or photography by Archives staff. Staff will issue a Temporary Custody Receipt (see Appendix C) to the owner in a timely fashion. Each incoming item will be treated in accordance with the general handling guidelines of the Oregon Shakespeare Festival Archives (see Appendix H.) Objects without a written loan agreement, deed of gift, or other negotiated contract will not be insured by Oregon Shakespeare Festival.

## **V. Preservation, Conservation and Collection Care**

### **A. General Preventive Collection Care**

The physical care of the collection will be maintained at professionally accepted standards. Staff will be expected to maintain procedures for periodic evaluation of the physical care of the collection. Oregon Shakespeare Festival activities will not jeopardize the collection.

### **B. Documentation**

Each acquisition entering the Archives is catalogued directly into the Archives database system by the archivists according to specific cataloguing guidelines; digitally photographed; tagged with a unique number; and moved to a specific storage location. Collection items will be processed and catalogued within six months of accessioning into the Archives. Storage locations for collections are kept in the database. All other activities related to the collections, including condition reports, processes, and conservation treatment reports, are documented in written or digital format and filed in permanent collection files. Condition reports will be maintained for all collection items on exhibit at OSF or another organization. Condition reports will be completed before and after an object is loaned, and before and after an object is given conservation treatment.

### **C. Handling**

Archives patrons and OSF staff will be allowed to handle Archives collections (see Appendix H, "Guidelines for Handling and Care of Collections.") Arrangements for packing and shipment of a collection or item will be made by the Lead Archivist and will be carried out according to professional archival and museum standards to ensure safety and security during all phases of handling and transit.

### **D. Storage Environment**

The collections are stored in a controlled environment with archival-quality temperature and humidity levels, and reduced lighting levels. Archival products are used whenever possible for housing items in storage. The primary storage areas have lockable doors. OSF facilities staff monitors the air handling units in storage. Visual inspection for pests is completed on a periodic basis by archives staff. The Archives may utilize off-site storage if necessary. Off-site storage, if utilized, must be stable in temperature, clean, secured, and accessible during regular work hours. Food, drink and living plants are not allowed in collection storage areas.

### **E. Inventory**

Physical inventories allow Archives staff to review the physical condition of objects and update location records. Inventories of Archives collections will be done every two years, beginning in 2011.

## **F. Conservation and Restoration**

Preventive conservation care (described in A-E, above) is the preferred method of care for the collection. However, it is acknowledged that cleaning, repair, restoration or digitization of collection items will be necessary in some cases to stabilize them or preserve their content.

Decisions for conservation treatment for collection items shall be made upon the recommendation of Archives staff and will take into consideration the object's condition, age, value (historic, exhibit, research, intrinsic, etc.) and cost of conservation. Conservation work will be undertaken by skilled professionals. The conservator shall provide a written treatment proposal that is submitted to the Lead Archivist for discussion and authorization. No irreversible actions will be done that will result in the detrimental alteration of the object's appearance or integrity. The Archives staff will document conservation proposals and treatments completed, as well as the rationale for proceeding with the work.

## **VI. Access & Use**

### **A. Access to Collection**

Access to the collection is governed by the "Oregon Shakespeare Festival Archives Access Policy."

The entire Archives collection is an authentic and original historical record of the Oregon Shakespeare Festival, its employees, members and patrons. As such, no print record or artifact can be altered or permanently retrieved from the collection back into active use. Besides the legal and ethical implications this would raise, such action could also deny vital information to future users.

The Archives staff works actively to provide easy access to archival collections, and plays a key role in leveraging the assets of the collection for the benefit of OSF and external researchers. Archives collections are accessible on a pre-arranged, case-by-case basis. OSF staff and key stakeholders may check-out collection materials for use at another location on-site, with the approval of the Lead Archivist. External researchers will be required to use Archives collections in the Archives research areas, or at an institution with which the OSF has arranged an official research loan. Records will be kept on Archives patrons and what collection materials they use. All researchers working with original materials will be supervised and required to follow the Archives' handling guidelines (See Appendix H, "Guidelines for Handling and Care of Collections.")

Inspectors and contractors who need to enter collection storage areas must be escorted at all times by a member of OSF's facilities, security or Archives staff. Contractors may not be left unattended in collection storage areas.

The Archives staff conducts tours of the Archives for internal staff and select visitors upon request. Tour activity is documented.

Requests for access to Archives collections and records stored in non-public areas may be denied for reasons of inadequate staffing or space availability, confidentiality, or other reasons that may pose unusual risk or disruption to the environment or arrangement of the collection. The Lead Archivist has the final authority to approve collections access and use.

## **B. Digital Assets**

Access to images of digitized items in the Archives collection is available through Portfolio or through special arrangement with the Lead Archivist and the Photography staff. The Portfolio digital asset management system is a company resource that is available to all employees upon request, and allows internal stakeholders to view and order images of Archives collection items. The OSF Portfolio system is not available to the public. Plans are being made for the digitization of selected Oregon Shakespeare Festival publications; they will be scanned and converted to PDFs, and made available to OSF staff and researchers. Images are digitally water-marked to prevent inappropriate use.

## **C. Photographic Rights**

Non-flash photography by the general public will be allowed in all areas of the Archives.

The Archives allows reproduction of the majority of collection items, including photographs, documents, audio and video. The Archives will also, upon occasion, seek to secure permission to copy (in digital or analog format) materials owned by others in order to supplement the photographic collection (See Appendix G, "Permission to Copy Agreement.") Photography generated by internal Oregon Shakespeare Festival departments will be acquired into Archives collections with the proper documentation of full usage rights.

## **VII. Risk Management and Insurance**

The valuation of the collection is reviewed and updated annually by Archives staff in conjunction with the Finance and Administration departments to ensure adequate coverage. Outgoing loans must be insured at fair-market value while off-site. OSF will provide insurance coverage for loans to the Archives; however, OSF will generally not insure items in temporary custody unless otherwise agreed to between both parties. The Lead Archivist is responsible for working with Finance in securing and maintaining appropriate insurance coverage for works on loan and in transit, and for processing insurance claims.

The Archives is developing a Disaster Recovery Plan that outlines procedures and priorities for recovery and salvage of the collection in the event of an emergency. This plan will be integrated into the larger OSF facilities plan.

## **VIII. Ethics**

Oregon Shakespeare Festival Archives staff conduct their and related duties in accordance with the Oregon Shakespeare Festival Values Statement, and comply with OSF's rules of confidentiality. They also conduct themselves in accordance with the Society of American Archivists Code of Ethics for Archivists (see Appendix A.)

It is understood that Oregon Shakespeare Festival Archives employees are also patrons of the Festival. As such, Archives employees may decide to build personal collections of memorabilia. Staff members will not compete with the Archives' collecting activities and will conduct their personal collecting in an ethical manner. Staff members will refrain from using their position or privileged information to intentionally derive profit or gain to themselves, outside individuals, groups or businesses.

All employees who work in the Archives as well as those who come in contact with each department will maintain the confidentiality of donors, sellers, lenders, and other stakeholders.

The Archives staff refrains from competitive activities against other institutions for objects or collections where the integrity, ownership and preservation of collections might be compromised.

Oregon Shakespeare Festival Archives staff members refrain from irresponsible criticism of other archives, library or museum professionals and institutions.

## **IX. Revision and Review**

The collections policy document and supporting documentation is to be reviewed and revised annually by the Archives staff and the Collections Committee.

# APPENDIX A

## Society of American Archivists Code of Ethics for Archivists

### Preamble

The Code of Ethics for Archivists establishes standards for the archival profession. It introduces new members of the profession to those standards, reminds experienced archivists of their professional responsibilities, and serves as a model for institutional policies. It also is intended to inspire public confidence in the profession.

This code provides an ethical framework to guide members of the profession. It does not provide the solution to specific problems.

The term “archivist” as used in this code encompasses all those concerned with the selection, control, care, preservation, and administration of historical and documentary records of enduring value.

### I. Purpose

The Society of American Archivists recognizes the importance of educating the profession and general public about archival ethics by codifying ethical principles to guide the work of archivists. This code provides a set of principles to which archivists aspire.

### II. Professional Relationships

Archivists select, preserve, and make available historical and documentary records of enduring value. Archivists cooperate, collaborate, and respect each institution and its mission and collecting policy. Respect and cooperation form the basis of all professional relationships with colleagues and users.

### III. Judgment

Archivists should exercise professional judgment in acquiring, appraising, and processing historical materials. They should not allow personal beliefs or perspectives to affect their decisions.

### IV. Trust

Archivists should not profit or otherwise benefit from their privileged access to and control of historical records and documentary materials.

### V. Authenticity and Integrity

Archivists strive to preserve and protect the authenticity of records in their holdings by documenting their creation and use in hard copy and electronic formats. They have a fundamental obligation to preserve the intellectual and physical integrity of those records.

Archivists may not alter, manipulate, or destroy data or records to conceal facts or distort evidence.

### VI. Access

Archivists strive to promote open and equitable access to their services and the records in their care without discrimination or preferential treatment, and in accordance with legal requirements, cultural sensitivities, and institutional policies. Archivists recognize their responsibility to promote the use of records as a fundamental purpose of the keeping of archives. Archivists may place restrictions on access for the protection of privacy or confidentiality of information in the records.

### VII. Privacy

Archivists protect the privacy rights of donors and individuals or groups who are the subject of records. They respect all users’ right to privacy by maintaining the confidentiality of their research and protecting any personal information collected about them in accordance with the institution’s security procedures.

### VIII. Security/Protection

Archivists protect all documentary materials for which they are responsible and guard them against defacement, physical damage, deterioration, and theft. Archivists should cooperate with colleagues and law enforcement agencies to apprehend and prosecute thieves and vandals.

**IX. Law**

Archivists must uphold all federal, state, and local laws.

*Approved by the SAA Council, February 5, 2005.*

**APPENDIX B**

**Oregon Shakespeare Festival Archives  
15 South Pioneer Street  
PO Box 158  
Ashland, OR 97520  
Phone: 541-482-2111  
Fax: 541-482-0446**

**DEED OF GIFT**

I, the Donor named below, confirm and warrant that I am the sole owner of, and have good and marketable title to, the materials described below. I hereby voluntarily donate these materials to the Oregon Shakespeare Festival Archives, free and clear of all liens, encumbrances and security interests, for the use or disposition by Oregon Shakespeare Festival Archives and its affiliates in any manner. I hereby transfer and assign all right, title and interest, including all financial interest, which I possess in these materials to Oregon Shakespeare Festival Archives, including without limitation all copyright, trade dress and trademark rights and all other intellectual property rights, except as otherwise specified below. I also represent and warrant that the use of these materials by Oregon Shakespeare Festival Archives or its affiliates will not violate any copyright, trademark or trade dress rights, or any other intellectual property rights of any third party. I acknowledge that, because Oregon Shakespeare Festival Archives is a tax-exempt organization, contributions or gifts to Oregon Shakespeare Festival Archives are deductible as charitable contributions for Federal income tax purposes. I understand that Oregon Shakespeare Festival Archives will not make, arrange, or pay for appraisals of donations.

Description of materials (attach a separate sheet if necessary):

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Credit line to read: Gift of \_\_\_\_\_  
This will determine how your gift is acknowledged when it is exhibited, lent or published.

\_\_\_\_\_  
Signature of Donor or Donor's Agent

\_\_\_\_\_  
Oregon Shakespeare Festival Archives

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Donor:  
Address:  
Phone:



# APPENDIX C

## Oregon Shakespeare Festival Archives

### Temporary Custody Receipt

The object(s) listed below has been received by the Oregon Shakespeare Festival Archives and is subject to the terms and conditions set forth.

**Date Received:** \_\_\_\_\_

**Via:** \_\_\_\_\_

*Hand, mail, other*

**Received from:**

\_\_\_\_\_  
*Name*

\_\_\_\_\_  
*Owner's Name (if different)*

\_\_\_\_\_  
*Street Address*

\_\_\_\_\_  
*Street Address*

\_\_\_\_\_  
*City State Zip Code*

\_\_\_\_\_  
*City State Zip Code*

(\_\_\_\_\_) \_\_\_\_\_  
*Business telephone*

(\_\_\_\_\_) \_\_\_\_\_  
*Business telephone*

(\_\_\_\_\_) \_\_\_\_\_  
*Home telephone*

(\_\_\_\_\_) \_\_\_\_\_  
*Home telephone*

(\_\_\_\_\_) \_\_\_\_\_  
*Fax*

(\_\_\_\_\_) \_\_\_\_\_  
*Fax*

\_\_\_\_\_  
*E-mail*

\_\_\_\_\_  
*E-mail*

**For the Following Purpose:** Consideration for gift  or Purchase  or Loan  or Study

**Scheduled Date of Removal of Object(s) is:** \_\_\_\_\_ (\*\*\*\*add in anything pertaining to loan agreement about limit on days to hold loan)

<b>Description of Object(s)</b> (title, maker, materials, date)	<b>Owner's Valuation</b> (US \$ amount)
--	--

\_\_\_\_\_  
**Received by:**

*Signature for OSF Archives*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Department*

**When Completed  
Sign & Date:**

I have read and agree to the conditions on reverse of this receipt. I certify that I have full authority to agree thereto.

\_\_\_\_\_  
*Signature of depositor*

\_\_\_\_\_  
*Date*

## Conditions Under Which Objects are Received for Temporary Custody

### CARE AND HANDLING

1.

The Oregon Shakespeare Festival Archives (the Archives) will give objects left in its custody the same care as it does to comparable property of its own, but will assume no additional responsibilities in regard to such objects. It is understood by the Depositor that all tangible objects are subject to gradual inherent deterioration for which the Archives is not responsible.

2.

The absence of condition notes on this receipt does not imply that the objects were received in good condition.

3.

The Archives will not clean, restore, reframe, or otherwise alter the objects without a written agreement from both parties. If such work has been authorized, the responsibility for the cost will be detailed in the written agreement.

4.

Attributions, dates, and other information shown overleaf are as given by the Depositor. Any valuations or prices shown are those stated by the Depositor and are not to be construed as appraisals by the Archives. The fact that the objects have been in the Archives' custody shall not be misused to indicate the Archives' endorsement.

5.

The Archives will not provide transportation for objects deposited with it unless special arrangements are agreed to in writing by the Archives. When objects are returned to the Depositor pursuant to such arrangements, failure to sign and return the official Archives outgoing receipt within 30 days of shipment of said objects shall release the Archives from any liability for the said objects.

### INSURANCE

1.

The Depositor hereby releases the Archives, and its agents and employees, from liability for any and all claims arising out of loss or damage to such objects. Unless a signed loan agreement stating terms of the loan and insurance exists, the Archives is not responsible for insurance coverage of the deposited objects.

### PHOTOGRAPHY

1.

Unless the Archives is notified in writing to the contrary, the Depositor agrees that the objects covered by this receipt may be photographed for record, publicity, or educational purposes. Such photographs will not be published or sold to the public without written consent of the Depositor.

### RETURNS

1.

The Archives will give reasonable notice in writing if it desires to return any object to the Depositor; and the Archives will make reasonable efforts to return the object to the Depositor.

2.

If such efforts are unavailing for any reason, the right of the Archives to require the Depositor to withdraw the said object shall accrue absolutely on the date of mailing a notice to the address listed overleaf via certified mail. Unless other arrangements are made, the object will be returned in the same manner as received.

3.

In the event that an object, the ownership having meanwhile passed by sale, bequest, or gift, is not to be returned to the original Depositor, the new owner or recipient must establish, in advance of such return, his/her authority to receive it to the satisfaction of the Archives' counsel.

### WARRANTY OF TITLE

1.

The Depositor warrants that he/she is the owner of the object; that the object is not subject to ownership claims of any other person, institution, or domestic or foreign government; and that he/she has complied with all applicable domestic and foreign customs and export/import regulations. If the Depositor is not the owner of the objects, the Depositor warrants that he/she has full authority to enter into this deposit transaction on behalf of the owner, and the owner is fully found hereby as the Depositor's principal. The Archives may require written evidence of the Depositor's agency by proof satisfactory to the Archives' counsel.

# APPENDIX D

## ACQUISITION PROPOSAL

DESCRIPTION OF ACQUISITION:

Date: \_\_\_\_\_

ACQUISITION EVALUATION/CRITERIA (include comments when appropriate):

Authenticity \_\_\_\_\_  
Significance \_\_\_\_\_  
Uniqueness \_\_\_\_\_  
Accessibility \_\_\_\_\_  
Relevance \_\_\_\_\_  
Quality \_\_\_\_\_  
Informational value \_\_\_\_\_  
Completeness \_\_\_\_\_  
Potential use \_\_\_\_\_  
Item on hit list \_\_\_\_\_  
Care/cost of upkeep \_\_\_\_\_  
Purchase price in line with market values \_\_\_\_\_  
Legal title obtainable \_\_\_\_\_

Acquisition Method (check one): Gift\_\_\_\_ Bequest\_\_\_\_ Exchange \_\_\_\_ Purchase\_\_\_\_

Donor Name and Address:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Vendor Name and Address:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Condition:

Location:

In-house (Informal) Appraisal:

Asking Price:

Terms, Conditions, and/or Restrictions:

ACQUISITION APPROVED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
(Marketing/Communications Director)

ACQUISITION APPROVED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
(Lead Archivist)

Comments:

# APPENDIX E

Oregon Shakespeare Festival Archives  
15 South Pioneer Street  
Ashland, OR 97520  
Phone: 541-482-2111  
Fax: 541-482-0446

## Outgoing Loan Agreement

The Oregon Shakespeare Festival Archives (Lender) agrees, subject to the terms and conditions printed on all pages of this Agreement, to lend the following object(s) (Loaned Property) as described below to:

**Borrowing Institution (Borrower):** \_\_\_\_\_

**Name of Representative:** \_\_\_\_\_  
First Last

**Address:**

\_\_\_\_\_  
Street City State Zip Code

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **Email:** \_\_\_\_\_  
- - - - - - - - - -

**Loan Dates:** (as determined in agreement with the Oregon Shakespeare Festival Archives)

From: \_\_\_\_\_, 20\_\_\_\_ To: \_\_\_\_\_, 20\_\_\_\_  
Month Day Year Month Day Year

**Purpose of Loan:** \_\_\_\_\_

**Exhibition Title:** \_\_\_\_\_

**Credit Line:** "Objects for this exhibit were provided by Oregon Shakespeare Festival in conjunction with the Oregon Shakespeare Festival Archives."

**Exhibit Text Requirement:** If photos are exhibited, the exhibit text must include the name of the actors in the photos, and the photographer.

**Description of Loan Property (attach a separate sheet if necessary):**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**OSF Collection ID#:** \_\_\_\_\_

**Dimensions:** \_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_ or \_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_  
H W D (centimeters) H W D (inches)

**Special Conservation Needs:** \_\_\_\_\_

**Condition Report attached** (required)  **Photograph attached** (required)

**Environmental Conditions Required:** \_\_\_\_\_

**Insurance Value:** \$ \_\_\_\_\_  Insurance to be carried by Borrower named above.  
 Insurance to be carried by OSF.

**Method of Shipping:** \_\_\_\_\_

**Special handling instructions:** \_\_\_\_\_

Deadline to return this Agreement and collateral documents: \_\_\_\_\_, 20\_\_\_\_  
Month Day Year

**Signature:** The Borrower acknowledges that he/she has full authority and power to enter into this agreement, that he/she has read the conditions above and on the third page of this form and that he/she agrees to be bound by them.

\_\_\_\_\_, 20\_\_\_\_  
**Borrower:** Print Signature Month Day Year

\_\_\_\_\_, 20\_\_\_\_  
**For OSF:** Print Signature Month Day Year

**Borrower and Oregon Shakespeare Festival, Inc. d/b/a/ the Oregon Shakespeare Festival Archives (the Lender) agree to the following terms and conditions and cannot change them without written consent:**

**General**

1. It is Borrower's responsibility to become familiar with stipulations covering this transaction.
2. No loans will be made until all necessary documentation has been received by Lender, and this Agreement has been signed by both parties.
3. Borrower is not permitted to make third party loans of the Loaned Property or to use the Loaned Property as collateral. Any third party loan requests shall be treated as an independent outgoing loan and negotiated directly with Lender.
4. It is the responsibility of Borrower or Borrower's authorized agent to notify Lender promptly in writing if there is any change in the identity or address of Borrower.

**Insurance**

1. The Loaned Property shall be continuously and fully insured at Borrower's expense for the amount specified on this Agreement, unless waived by Lender and so noted on this Agreement. Insurance shall be "special causes of loss form" against all risks of physical loss or damage from any external causes while in transit and on location for the entire duration of the loan. Borrower must also provide commercial general liability coverage. Borrower shall provide proof of insurance to Lender. Lender must be notified in writing at least 20 days prior to any cancellation or meaningful change in Borrower's insurance policy. Lender must receive from Borrower a copy of the certificate of insurance naming Lender as loss payee and an additional insured and provide a waiver of subrogation.
2. Any lapses in coverage or any failure to secure insurance and/or any inaction by Lender regarding notice will not release Borrower from liability for loss or damage.
3. Dollar values provided are confidential and are for insurance purposes only. Lender reserves the right to increase the amount of insurance coverage required on the Loaned Property, if reasonably justified and documented.
4. Borrower agrees to waive all claims and recourse against Lender for loss or damage to persons or collections arising from this Agreement. Borrower agrees to defend, indemnify, and save harmless Lender from all liability, loss, cost, or obligation on account or arising out of any injury to any person or property of any kind, from any cause whatsoever, in any way connected with Borrower's use of Loaned Property, including acceptance and redelivery thereof.

**Condition, Alteration, and Conservation**

1. The Loaned Property is considered to be in stated condition (as stipulated in attached Condition Report) unless otherwise noted.
2. Loaned Property borrowed shall be given proper care to insure against loss, damage or deterioration. Borrower agrees to meet any special requirements for installation and handling.
3. Loaned Property may not be cleaned, repaired, retouched or altered in any way without the express written permission of Lender.
4. Loss, damage or deterioration must be reported to Lender immediately followed by a full written and photographic report. If damage occurs, it is understood that any necessary conservation treatment will be arranged for or handled by Borrower as agreed to in writing with Lender, and that Borrower or its insurance company is liable for all costs resulting from damage, including the cost of conservation, for any reduction in value or replacement. Lender reserves the right to have its archivists do the repairs and Borrower shall reimburse Lender such repair costs.
5. Should a discrepancy exist from that of the condition indicated on this Agreement by Lender, notification shall be sent to Lender within 5 business days from this date of receipt with a written conditions report.

**Security and Environmental Controls**

1. Borrower must provide at all times, adequate security in order to protect Loaned Property against risk of damage, loss or deterioration due to theft, vandalism, fire, smoke, and water. Adequate protection against insects, vermin, fungi, mold and pollutants must also be provided.
2. Loaned Property must be protected at all times against damage caused by exposure to direct sunlight, ultraviolet light, excessive humidity, or proximity to heating or cooling sources. Temperature and relative humidity levels should be monitored on a daily basis. Levels must be controlled to minimize short-term fluctuations and to avoid harmful extremes.
3. If these conditions cannot be met, Lender must be advised in writing. The amended conditions should be attached to this Agreement and noted on the face of this Agreement prior to execution by both parties.

**Access**

1. Access to the Loaned Property by individuals for purposes other than those identified on this Agreement must receive prior approval by Lender and must be supervised by Borrower. Use of Loaned Property must be restricted to a supervised area. Researchers will be subject to the Lender's current user rules and restrictions. Borrower will be responsible for any misconduct by persons "using" materials.
2. Loaned Property will be handled only by experienced personnel.
3. Borrower must provide access to Lender's staff or representatives during regular hours of operations for the purposes of inspections, inventory, re-packing, research, condition reporting and audit.
4. Borrower agrees to provide access to original material only when all other options, such as photographs or reproductions, have been exhausted.

**Extension and Recall**

1. The loan is made with the understanding that the Loaned Property will be on view during the entire exhibition period for which it has been requested.
2. Any extensions of the loan period must be requested by Borrower. Lender will prepare extension documents to be completed and signed by Borrower and received by Lender at least 30 calendar days prior to the original loan expiration date shown on this Agreement. All additional insurance will be extended by Borrower and proof of insurance will be provided to Lender by a copy of the certificate of insurance naming Lender as an additional insured, and provide a waiver of subrogation and dated with the new termination date of the loan.
3. Lender reserves the right to inspect or audit the Loaned Property on loan at any time. Should Lender desire to recall any of the Loaned Property for its own purposes, it may do so by giving at least 30 days notice to Borrower. Loaned Property may be withdrawn by Lender without prior written notice to Borrower if it is determined it is receiving improper care.
4. Borrower agrees to give at least 30 days written notice to Lender if electing to cancel this loan prior to the term of this Agreement.
5. Should Borrower be unable to continue care for the Loaned Property it must be returned to Lender or Lender's designee.

**Packing and Shipping**

1. Packing and transportation must be by safe methods designated and approved in advance by the Lender and noted on this Agreement. Borrower must comply with shipping and packing instructions provided by Lender. Lender certifies that the Loaned Property is in condition to withstand ordinary strains of packing, transportation, and handling.
2. Lender will pack the Loaned Property and will provide packing materials for the loan. All Loaned Property will be shipped and packed at the expense of the Borrower unless otherwise noted.
3. Unpacking and re-packing must be done by experienced personnel under competent supervision. The Loaned Property must be repacked in the same manner as received and with the same packing materials if possible, unless otherwise mutually agreed upon by Lender and Borrower. All packing materials should be stored, if possible, during the loan period in a place fully conditioned to the same temperature and relative humidity as those under which the Loaned Property itself is stored or displayed. All packing materials that are to be reused must be protected from contamination by insects, mold, dust, and airborne pollutants.
4. Government regulations will be adhered to in international shipments. Borrower is responsible for adhering to its country's import/export requirements.

**Reproduction and Credit**

1. Lender will make available, through an outside service, photographs of the Loaned Property, which may be used for catalog, routine non-commercial educational uses, publicity and registration purposes. No further use of such photographs can be made and no other reproduction of the Loaned Property can be made without the written permission from Lender.
2. Each object of the Loaned Property will be labeled and credited to Lender in the exact format provided on the face of this Agreement, both for display labels and publication credit.

# APPENDIX F

## Oregon Shakespeare Festival

### Record of Deaccession

The deaccession section of the Oregon Shakespeare Festival Archives Collections Policy should be consulted when recommending that an object be deaccessioned.

The following item(s) are recommended for deaccession:

DESCRIPTION: Accession/Acquisition #: \_\_\_\_\_

DOES ARCHIVES HOLD LEGAL TITLE? YES \_\_\_\_\_ NO \_\_\_\_\_  
If no, please explain.

METHOD OF ACQUISITION: DATE \_\_\_\_\_

#### DEACCESSION CRITERIA:

- \_\_\_ Collection/item falls outside the collection goals and mission of the Archives;
- \_\_\_ Collection/item duplicates another in the collection;
- \_\_\_ There exists an over-representation of the material/subject-matter/type of collection/item within the collection;
- \_\_\_ Collection/item lacks sufficient historic merit and it unlikely to be exhibited or used for teaching;
- \_\_\_ Collection/item has deteriorated to such poor physical condition that it is not possible or practical for it to be adequately conserved, or its restoration would be so extensive as to destroy its integrity;
- \_\_\_ Collection/item is accidentally irreparably damaged;
- \_\_\_ Collection/item poses a health or safety risk to the collection, staff, or public;
- \_\_\_ A clear determination has been made that OSF Archives does not hold full and clear title to the collection/item, or that it has been illegally exported and/or imported;
- \_\_\_ Collection/item proves to be inauthentic.

RECOMMENDED METHOD OF DISPOSAL

- Public auction
- Witnessed destruction
- Exchange or trade with another archives, museum or private party
- Transfer
- Other

DEACCESSION APPROVED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
(Marketing/Communications Director)

DEACCESSION APPROVED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
(Lead Archivist)

Comments:

Please attach photograph(s) if applicable.



**APPENDIX G**

**Oregon Shakespeare Festival Archives**

**Permission to Copy Agreement**

I, the undersigned, authorize the Oregon Shakespeare Festival Archives (hereinafter referred to as the Archives) to copy the materials listed in this agreement. I also authorize the Archives to reproduce, publish, and/or broadcast these materials at will as it deems appropriate, without restrictions. Any restrictions to be placed on the use of these materials must be agreed upon, in writing, before this form is signed. Finally, I agree to hold the Archives, the Oregon Shakespeare Festival, its subsidiaries, licensees and vendors harmless from all claims of violation of copyright and rights of privacy.

**The materials covered by this agreement are as follows (attach list if necessary):**

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**Owner of the original materials:**

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Representing (firm): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone : \_\_\_\_\_ Fax: \_\_\_\_\_

\_\_\_\_\_  
Signature - Oregon Shakespeare Festival Archives  
or authorized representative

\_\_\_\_\_  
date

## APPENDIX H

**Oregon Shakespeare Festival Archives**  
**15 South Pioneer Street**  
**Ashland, OR 97520**  
**Phone: 541-482-2111**  
**Fax: 541-482-0446**

### Guidelines for Handling and Care of Collections

- 1) Archival collections are removed from storage by Oregon Shakespeare Festival Archives staff only. No exceptions are made.
- 2) No food or beverages are allowed in the Archives, except bottled water, which is not allowed near archival materials. If working with archival materials outside of the department, no food or drinks are to be placed on or near the materials.
- 3) **Use pencil only when writing in the vicinity of original archival materials.** Please do not use pens, markers, or any other types of permanent ink on or near the materials.
- 4) Do not leave any materials exposed to direct sunlight. Also, the materials should be in an environment in which the temperature range is approximately 60 to 75 degrees Fahrenheit and as close to 45 percent relative humidity as possible.
- 5) Make sure your hands are clean. Particularly, if you have just eaten or handled dirty or oily materials, do not handle archival items until you've had a chance to wash your hands.
- 6) Please wear gloves when handling photos that are not in protective plastic sleeves. Gloves will be provided by the Archives staff. You do not need gloves to handle photos that are in protective plastic sleeves.
- 7) If you encounter any items that are folded where no fold should exist, please do not backfold the item to correct the problem; notify the Archivist when you are finished with the item. Never backfold any bound volumes, catalogs, pamphlets or any other folded or bound items. Take particular care with damaged or severely weakened materials.
- 8) **Archives materials may not be copied or reproduced without the consent of the Archives staff.**
- 9) If you find that you need to photocopy any bound or folded items, do not place undue stress on bindings by placing pressure on the bindings or folds. Never place original archival documents in the photocopier auto feeder.
- 10) Neither Archives materials nor their images may be altered in any way without prior written permission from the Archives staff.
- 11) Do not loan any archival items without first consulting with the Archives (x243 or x266).
- 12) If any materials in your care disappear or are stolen, contact the Archives immediately (see phone numbers listed in #11).
- 13) Under no circumstances may archival materials be removed from the Archives without prior approval and the subsequent proper handling and transporting procedures being implemented.

The Archives staff appreciates your cooperation with these guidelines. Questions about this policy should be referred to:

Maria DeWeerd  
Lead Archivist  
Oregon Shakespeare Festival Archives  
15 South Pioneer Street  
PO Box 158  
Ashland, OR 97520  
Phone: 541-482-2111 ext. 243  
Fax: 541-482-0446

# APPENDIX I

**Oregon Shakespeare Festival Archives**  
**15 South Pioneer Street**  
**PO Box 158**  
**Ashland, OR 97520**  
**Phone: 541-482-2111**  
**Fax: 541-482-0446**

## Incoming Loan Agreement

The Oregon Shakespeare Festival Archives intends to borrow, subject to the terms and conditions printed in this Agreement, the object(s) (Loaned Property) as described below from:

**Lending Institution:** \_\_\_\_\_

**Name of representative:** \_\_\_\_\_

**Address:**

\_\_\_\_\_

Street	City	State	Zip Code
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**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Loan Dates:** (as determined by Oregon Shakespeare Festival Archives)

From: \_\_\_\_\_, 20\_\_\_\_ To: \_\_\_\_\_, 20\_\_\_\_  
Month Day Year Month Day Year

**Purpose:** \_\_\_\_\_

**Acknowledgment Line:** \_\_\_\_\_

Please state exactly how Lender's name should appear for exhibit purposes.

**Description of Loan Property:** \_\_\_\_\_

**Item ID #** (if applicable):

**Dimensions:** \_\_\_\_\_ x \_\_\_\_\_ x \_\_\_\_\_ **or** \_\_\_\_\_ x \_\_\_\_\_ x \_\_\_\_\_  
H W D (centimeters) H W D (inches)

\_\_\_ **Condition Report attached** (required) \_\_\_ **Photograph attached** (required)

**Insurance Value:** \$ \_\_\_\_\_  Insurance to be carried by Borrower named above.  
 Insurance to be carried by OSF.

**Method of shipping:** \_\_\_\_\_

**Special handling instructions:** \_\_\_\_\_

**Deadline to return this Agreement and collateral documents:** \_\_\_\_\_, 20\_\_\_\_  
Month Day Year

**Signature:** The Lender acknowledges that he/she has full authority and power to enter into this agreement, that he/she has read the conditions above and on the third page of this form, and that he/she agrees to be bound by them.

\_\_\_\_\_  
**Lender: Print**                      \_\_\_\_\_  
Signature                                      \_\_\_\_\_  
Month                                      \_\_\_\_\_, 20\_\_\_\_  
Day                                      \_\_\_\_\_  
Year

\_\_\_\_\_  
**For OSF: Print**                      \_\_\_\_\_  
Signature                                      \_\_\_\_\_  
Month                                      \_\_\_\_\_, 20\_\_\_\_  
Day                                      \_\_\_\_\_  
Year

**Lender and Oregon Shakespeare Festival (from here on in referred to as OSF) agree to the following terms and conditions and cannot change them without written consent:**

#### **Insurance**

1. The Loaned Property will be insured by OSF for the amount specified by Lender herein under its "wall to wall standard all risks coverage" policy subject to standard exclusions including but not limited to: wear and tear, gradual deterioration, insects, vermin and inherent vice, repairing, restoration and retouching process; hostile or warlike action, terrorists, insurrection, rebellion, nuclear reaction, nuclear radiation, or radioactive contamination.
2. Lender should be careful to specify an amount that reflects fair market value of the Loaned Property. If Lender fails to indicate an amount, OSF will set a value for purposes of insurance for the period of the loan. Lender understands this value is not to be considered an appraisal.
3. The amount payable by insurance, secured in accordance with this Agreement, is the sole recovery available to Lender from OSF in the event of loss or damage.
4. If Lender elects to maintain insurance coverage, OSF must be supplied with a certificate of insurance naming OSF as an additional insured and waiving rights of subrogation. This certificate must be received by OSF prior to Lender shipping the Loaned Property. If Lender fails to provide this certificate, this failure shall constitute a waiver of insurance by Lender. OSF shall not be responsible for any error or deficiency in information furnished by Lender to the insurer or for any lapses in such coverage.
5. If insurance is waived by Lender, this waiver shall constitute the agreement of Lender to release and hold harmless OSF from any liability for damages to or loss of the Loaned Property.
6. Insurance coverage for the Loaned Property should begin at the time the Loaned Property leaves Lender's control.

#### **Condition, Alteration, and Conservation**

1. Lender certifies that the Loaned Property is in stated condition (as stipulated in attached Condition Report) and will withstand ordinary strains of packing, transportation, handling and exhibition.
2. It is understood that OSF will not clean, restore, repair, or otherwise alter the Loaned Property without the written consent of Lender and a written agreement as to costs and responsibilities for payment of same.
3. OSF will give to the Loaned Property the same care it does objects in its permanent collections.
4. Lender acknowledges that a Condition Report will be generated by OSF upon receipt of Loaned Property. Should a discrepancy exist from that of the condition indicated by Lender, notification will be sent to Lender within 5 business days from this date of receipt. Should damage occur in transit, the carrier will also be notified and all packing materials saved for inspection.
5. If damage during the loan is noted, Lender will be notified at once.
6. OSF assumes the right, unless specifically denied by Lender, to examine the Loaned Property according to standard curatorial practices.
7. Lender agrees that OSF may display, transmit by means of electronic transmissions and/or internet or any other medium now in existence or hereinafter known, photograph, digitize, telecast or reproduce the Loaned Property, or derivations thereof, for educational, publication, and publicity purposes. Unless otherwise

instructed in writing, OSF will give credit to Lender as specified on the face of this agreement.

8. Lender understands that visitors may photograph the Loaned Property while in OSF.

#### **Security and Environmental Controls**

1. Precautions will be taken to protect the Loaned Property from fire, theft, mishandling, dirt, insects, and extremes of light, temperature and humidity while in OSF's custody.
2. It is understood by Lender and OSF that all tangible objects including the Loaned Property are subject to gradual deterioration for which neither party is responsible.

#### **Return of Property**

1. The Loaned Property will be returned only to Lender, or Lender's duly authorized agent at the address stated on the reverse unless OSF is otherwise instructed in writing.
2. It is the responsibility of Lender or Lender's agent to notify OSF promptly in writing if there is any change in ownership of the Loaned Property (whether through death, sale, insolvency, gift or otherwise) or if there is a change in the identity or address of Lender. The new owner will be required to establish the legal right to receive the Property by proof satisfactory to OSF, prior to any shipment of the Loaned Property.
3. OSF assumes no responsibility to search for Lender (or any subsequent owner) who cannot be reached at the address of record.
4. Unless otherwise agreed in writing, a loan terminates on the date specified in this Agreement. Upon termination of the loan, Lender will be notified that a return or renewal must be effected.
5. When Loaned Property is returned, OSF will send Lender a receipt form. If the form is not signed and returned within thirty days after mailing, OSF will not be responsible for any damage or loss.
6. If OSF's efforts to return Loaned Property within a reasonable period following the termination of the loan are unsuccessful, then the Loaned Property will be maintained at Lender's expense for a maximum of one year. If after one year the Loaned Property has not been claimed, then and in consideration for maintenance and safeguarding, Lender/or any subsequent owner shall be deemed to have made the Loaned Property an unrestricted gift to OSF.

#### **Extension and Recall**

1. OSF retains the right to determine when, if, and for how long Loaned Property will be exhibited. OSF retains the right to cancel the loan upon reasonable notice to Lender.
2. Any loan extensions require written permission from Lender, which shall not be unreasonably withheld in the event an exhibit is extended.

#### **Transportation and Packing**

1. Loaned Property will be returned, packed in the same or similar materials as received, unless otherwise authorized by Lender.
2. OSF coordinates transportation, and bears the cost of packing and shipping, except for circumstances governed by other arrangements.
3. Any special handling instructions must be agreed upon by both parties in writing.
4. Government regulations will be adhered to in international shipments. As a rule, Lender is responsible for adhering to its country's import/export requirements and OSF is responsible for adhering to its country's import/export requirements.