

# THE PHILADELPHIA MUSEUM OF ART ARCHIVES

## Access Policy

### OVERVIEW

The ultimate goal of the Archives is to provide access to archival records on a fair and equitable basis. However, it is sometimes necessary to restrict certain materials to protect individual privacy rights and legitimate proprietary rights of the Museum.

The Archives, in accordance with legal and ethical guidelines, will inform Museum staff and donors when it is appropriate to impose restrictions on incoming materials.

Restrictions on access will be explicit, easy to enforce, and limited only to those materials that can be identified as sensitive. Unreasonable restrictions will be avoided, and most restricted materials will be assigned an expiration date, at which time their sensitivity is no longer an issue.

### PROCEDURE

- 1) The Archives will work with Museum staff and donors to determine appropriate restrictions for sensitive or confidential materials, using legal guidelines, established museum practices, the Society of American Archivists' *Code of Ethics*, as well as their "Standards for Access to Research Materials in Archival and Manuscript Repositories."
- 2) Restrictions will be imposed on access to certain materials, including but not limited to: the Board of Trustees' minutes, Director's files, personnel files, financial information, legal actions, donor confidentiality, insurance and appraisal records, conservation reports, unprocessed collections, or anything that would compromise the Museum's security or operations.
- 3) Exhibition records, insurance values, and condition reports of art objects will be permanently restricted for both incoming and outgoing loans. Private lender names and contact information will also be permanently restricted to protect privacy.
- 4) Restrictions on donated materials will be clearly prescribed in the transfer documentation. Terms for limited access (see steps 8-10 below) should be

determined at the time of transfer, along with expiration dates for the restriction.

- 5) If restriction terms are not clearly prescribed, and it becomes apparent during processing that they should be, the Archives will attempt to contact the donor to establish the appropriate terms. In the absence of a donor's input, the Archives may impose restrictions at their discretion.
- 6) A restricted file will be clearly marked "RESTRICTED" in red pencil on the outside of the folder, or a series will be entirely restricted, and marked on both folders and container(s). Information regarding the nature of the restriction will also be included with the materials as well as noted in the corresponding finding aid. Restriction of entire record groups or collections will be avoided; instead, access will be limited to only the materials that can be identified as sensitive.
- 7) Unless terms of limited access are noted (see below), only the donor, along with designated administrators, will have access to restricted files.
- 8) In determining limited access, the Archives should consider a researcher's "need to know." For instance, a Museum employee with a need to access materials in the course of doing his or her job demonstrates a high need to know, whereas an outside visitor making a casual inquiry does not. In general, the more serious and scholarly the nature of the inquiry, the more likely the researcher will be granted some degree of access.
- 9) In certain cases of limited access, the Archives may use restricted files to answer questions for researchers, extracting the pertinent but still non-sensitive, information.
- 10) In other cases of limited access, the Archives would consult with the donor to receive permission before allowing the researcher to consult certain groups of material.
- 11) Access to certain materials that are fragile or have high intrinsic value (such as the Museum's Charter) may also be limited, and the examination of such materials will be supervised.
- 12) Disputes regarding restricted materials will be settled in consultation with the Director/CEO of the Museum, who is the ultimate authority in such matters.