

ACCESS POLICY

The Archives provides access to the Museum's records and manuscripts to the fullest extent possible on a fair and equitable basis. Certain materials are restricted by donors and others to protect individual privacy rights and proprietary rights of the Museum.

Access restrictions are clear, easy to enforce, and limited only to materials that can be identified as sensitive. Unreasonable restrictions are to be avoided, and most restricted materials are assigned an expiration date.

GUIDELINES

1) Archivists works 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 on donated materials are clearly prescribed in the Deed of Gift and transfer documentation, along with expiration dates for the restriction.

3) If restriction terms are not clearly prescribed, and it becomes apparent during processing that they should be created, the archivist will attempt to contact the donor to establish the appropriate terms. In the absence of a donor's input, the archivist may impose discretionary restrictions.

4) Restricted files are clearly documented or marked either in the corresponding finding aid, on the folder, and/or the container. If it is a temporary restriction, it is marked "Restricted until Year X." Restriction of entire record groups or collections is avoided; instead, access is limited to only the materials that can be identified as sensitive.

5) Only the donor and administrators designated by the donor have access to restricted files, unless terms of limited access are noted (see below). In certain cases, the archivists may use restricted files to answer research questions, extracting non-sensitive and pertinent information.

6) In determining access, the archivist takes into consideration a researcher's "need to know." For instance, a museum employee with a need to access materials in the course of doing their job demonstrates a high need to know, whereas an outside visitor making a casual inquiry does not.

7) Access to certain materials that are fragile or have high intrinsic value may also be limited, and the examination of such materials will be supervised.

8) Records in the Archives will unavoidably contain Personally Identifying Information (PII)¹. If a record is deemed to have high research value and contains PII, it is restricted with limited access at the discretion of the archivist or a copy made available with the PII redacted.

9) In general, the archivist avoids accepting materials that have permanent restrictions as our mission is focused on research and open access. Departments are encouraged to retain permanently restricted materials in their own files.

10) Disputes regarding restricted materials are settled in consultation with the Director/CEO of the Museum, who is the ultimate authority in such matters.

RESTRICTION CHART

Type of Record	Restriction Period	Notes
General institutional records, other than Executive Office records	10 years	Access to institutional records less than 10 years old is at the discretion of the Archivist.
Board of Trustee and Committee minutes	10 years	Access to institutional records less than 10 years old is at the discretion of the Archivist.
Director / Executive Office records	15 years	Access to institutional records less than 15 years old is at the discretion of the Archivist.
Any correspondence, research or documents (appraisal, invoice, auction record, insurance) stating the value of the work	60 years	Older valuations and provenance documentation such as dealer receipts are shared at the discretion of the curatorial department.
Conservation and condition reports	60 years	Conservation and condition reports are weeded out of archives collections. Conservation is the office of record.
Unprocessed collections	Limited access	Access to unprocessed collections is made available to staff and researchers at the discretion of the Archivist.

Confidential information about museum storage or security procedures	Permanent with staff access	Access to museum storage or security information is made available to staff at the discretion of the Archivist.
Legal actions	Permanent	Legal actions are weeded out of archives collections. Restriction does not apply to: (1) attorney writings w/o legal advice or opinions; and (2) documents filed w/Court (and thus public record) except if filed under seal. Executive is the office of record.
Personnel files	Permanent	Personnel files are weeded out of archives collections. HR is the office of record.
Art incident reports	Permanent	Art incident reports are weeded out of archives collections. Conservation is the office of record.
Private lender names and contact information	Limited access	Access to records with private lender names and contact information is made available at the discretion of the Archivist. Registration is the office of record.
Sensitive museum acquisition documents including purchase agreements, invoices, pledge agreements, Artist Questionnaire/Donor Questionnaire/Vendor Questionnaire, etc.	Permanent	These documents are weeded out of archives collections. Curatorial is the office of record.

Import and export information	Permanent	These documents are weeded out of archives collections. Curatorial is the office of record.
Personally Identifiable Information (PII) as identified below ¹	Limited access until death of individual or 100 years after their birth	Access to records with PII is at the discretion of the Archivist.

¹Personally Identifiable Information (PII) includes:

“(1) any information that can be used to distinguish or trace an individual’s identity, such as name, social security number, date and place of birth, mother’s maiden name, or biometric records; and (2) any other information that is linked or linkable to an individual, such as medical, educational, financial, and employment information.”

Examples of PII include, but are not limited to:

- Personal identification numbers: social security number (SSN), passport number, driver’s license number, taxpayer identification number, patient identification number, financial account number, or credit card number
- Name: full name, maiden name, mother’s maiden name, or alias
- Personal address information: street address, or email address
- Personal telephone numbers

The following examples on their own do not constitute PII as more than one person could share these traits. However, when linked or linkable to one of the above examples, the following could be used to identify a specific person:

- Medical information
- Financial information
- Date of birth
- Place of birth
- Business telephone number
- Business mailing or email address
- Race
- Religion
- Geographical indicators
- Employment information
- Educational information

Access Procedures

OVERVIEW

The Archives of the Philadelphia Museum of Art is comprised of corporate records, manuscripts, personal papers, ephemera, scrapbooks, photographs, and artifacts which chronicle the history of the institution and its collection since its founding in 1876.

Please note: when requesting materials, certain types of information may not be available because of restrictions, permanent or temporary, that protect the privacy rights of individuals, legitimate proprietary rights of the museum and other organizations, or for other reasons.¹ However, the bulk of the collections are unrestricted and are made available to researchers on a fair and equitable basis.

PROCEDURE

The Philadelphia Museum of Art is pleased to make its archival collections available to researchers, but requests their full cooperation in adhering to the following guidelines:

- 1) Personal belongings such as coats, briefcases, handbags, etc., should not be placed on the research table; items used for research (i.e. pencils, paper, laptop computers) are allowed.
- 2) Researchers will receive permission to examine materials after filling out a Researcher Registration Form once per non-consecutive appointment. This form includes an agreement to be signed that indicates that the researcher has read the Access Procedures and a warning concerning copyright law. The Researcher Registration Form will be kept on file by the Archivist.
- 3) Materials in the museum's Archives do not circulate, and can only be used in the reading room with Library & Archives staff present. Staff will remove and return all materials to storage areas for patrons.
- 4) Researchers should examine records one box at a time, one folder at a time, maintaining the order in which they were received. Researchers will notify the Archivist if anything appears to be out of order and will not rearrange the records themselves.
- 5) Materials may not be removed from the reading room and must be returned in the same condition as when they were received for research. The Museum reserves the right to inspect the researcher's belongings, and as a condition to obtaining access to the materials, the researcher consents to such search.
- 6) Please use a common sense approach when handling records:

¹ This may include but is not limited to: Board of Trustee and Board Committee minutes, personnel files, financial records, legal actions, donor or lender records, acquisition related records, addresses or phone numbers of Trustees, contracts or negotiations with donors, lenders, employees or others, and anything that would compromise the museum's security or operations.

- Do not consume food or beverages at the reading table
- Wash hands before handling materials
- Only use pencils
- Do not erase or make marks on the documents
- Do not trace or write on top of the documents
- Gloves should be worn only if examining photographic materials
- Do not bend or crease brittle paper; support it against a stable flat surface, such as a folder or table-top
- Always support fragile bound material, such as scrapbooks, correctly. Ask for a cradle if needed.
- Do not remove materials from plastic sleeves unless given permission by a staff member.

Any improper handling and/or damage will result in materials being taken away from the researcher, and their user privileges being suspended. Archives staff can provide a magnifying glass, gloves, and appropriate support for fragile material.

7) Digital images may be taken with a camera, cell phone, or tablet, as long as the flash is turned off. Researchers may also use the BookEye scanner for archival material with permission of a staff member.

8) In consultation with staff, items to be copied or digitized should be marked with paper inserts, which are available at the reading table:

- Place the flag perpendicularly in front of the desired document(s) in the folder, so when the folder is returned to the box, the flag is visible.
- Please tell staff if you would like documents scanned or photocopied, along with a time frame for reproduction. Staff will create copies or scans, within reason, for patrons as a free service.
- We may be able to copy or scan an order of a few items the same day. Please allow 1-2 weeks for requests of larger quantities.