

# **Alternate Maths: How to Get the Most Out of Collections**

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The death threat was left as a voice mail message. The Historical Society of Pennsylvania had no business deaccessioning critical parts of Philadelphia's and the Nation's history. It had been given these artifacts and art works in good faith and needed to honor the intentions of the donors. Or else.

In the end, no one was killed. But the anger and outrage expressed in the voice mail were widespread despite the fact that everything in HSP's art and artifact collection remained in museums or, in one case, a theater lobby, and only three of the 10,000-plus items left Philadelphia.

Institutions often accession and deaccession collection items and real property in the context of decisions that Boards and staffs make about the functions, programs, and foci they either are adding, refining, or eliminating.

Donors rarely are troubled by the additions (except when they appear to redirect the priorities of the institution), but many contributors, as well as members of the community may become agitated by subtractions. These

judgments may be visceral rather than informed, but they nevertheless may have long-term, negative impact.

Over the past eight years, The Historical Society of Pennsylvania has made numerous, large-scale, mutually reinforcing decisions about what it should – and should not – collect and do. Sometimes these decisions have been made with sensitivity to the public and openness; sometimes not. As a result of the public’s responses, the Board and staff now always ask how best to help the public understand, not just how the institution, but also how the communities it documents and serves will benefit maximally from both any deaccessions and the targeted growth of collections. In the process, HSP has placed over 12,000 items in other collecting institutions, has sold or is in the midst of selling a handful of items to colleague institutions at more-or-less steep discounts and has sold or is preparing to sell at market rates approximately \$1 million worth of duplicate and out-of-scope materials.

Over the same years, through a merger, a strategic alliance, acquisitions, and gifts, HSP has added nearly a million items - 30% - to its holdings.

The roots of those collections are in the early 19<sup>th</sup> century. The precipitating event was the triumphal visit of the Marquis de Lafayette to Philadelphia in

1824. The visit thrilled Philadelphians, but it also troubled some of them. For all his vigor, elegance, and erect carriage, the Marquis was old—at 67, the age of George Washington at his death a quarter century earlier. Recognition of the fact as well as of the approaching fiftieth anniversary of the signing of the Declaration of Independence in Philadelphia moved a half dozen young men with deep roots in the commonwealth to propose creation of The Historical Society of Pennsylvania. At first, they imagined it as a heritage organization open to people like themselves—those with Pennsylvania antecedents. William Rawle, Jr., the man whom they recruited to be president, however, only accepted the position on the condition that membership would be open to men more generally. This made the Historical Society the first among the initial half dozen in the U.S. to be relatively inclusive in its membership and also, as it turned out, in its understanding of the history it should pursue.

The Penn family became the organization's patrons and began giving memorabilia and documentation of their ancestors' involvement in the creation and development of the commonwealth that bears their name. Increasingly, collecting became a chief focus of the organization.

By 1910 and the completion then of its new home at 1300 Locust Street, the Historical Society was unequalled in its documentation of the colonial era, and only the Library of Congress was doing more to document the nation's founding. African American history, the Civil War, politics in the region, and the published history of Pennsylvania and adjacent states were other centers of collecting strength. The institution was much better at collecting, however, than at preserving and providing adequate access to its holdings. Important art on the walls and artifacts in cases received almost no interpretation or public attention. As recently as 2001, staff concluded that only 3% of the 15 million items then in the holdings were processed to contemporary standards.

To address the challenge, the Historical Society decided in the early 1970s to claim public attention, earn gate receipts, and encourage private support by development of a state-of-the-art history museum with major permanent as well as rotating exhibitions. Remembering that almost a quarter of all Americans had visited Philadelphia in 1976, at the centennial of the Declaration of Independence, people in the region, including those on the Board of the Historical Society, had great hopes for the 1976 bicentennial. Those hopes were largely disappointed. Moreover, located as it was at the

gateway to Philadelphia's tenderloin district, the Historical Society found that the *succes d'estime* of its exhibitions did not translate into significantly increased visitation and support. Instead, the operation of the museum and the related, award-winning education programs put HSP in the red for 16 out of 20 years between 1976 and 1996.

Early in those decades, the Andrew W. Mellon Foundation gave challenge grants to help endow conservation, cataloging, and other core collection management functions, but the scale of the challenge overwhelmed initial brave efforts to meet the needs both of the collections and of their users. In the circumstances, not surprisingly, HSP's Board decided to revisit its earlier decision to develop the museum as a way to earn attention and support for the institution and its mission, to share Pennsylvania's histories.

When arriving at equivalent decisions about fundamental realignments of programs and collections, other institutions in the Philadelphia area – for instance, the Franklin Institute – had decided to sell those collections that no longer were to be part of their mission and future. HSP, however, did not want to put parts of the patrimony of the city and the region on the block in this way. Instead, it sought a partner to assume responsibility for, and to

exhibit out of, the 10,000-plus items in its museum holdings. At the same time, HSP determined to focus on sharing its massive library and archival holdings. To help underwrite the consequent reengineering of its facilities and operations, it decided to offer a handful of items to colleague institutions that had related collections. In this way, the outsized statue of Edwin Forrest was given to the Walnut Street Theatre, where Forrest often had performed; the splendid double portrait of Governor and Mrs. Mifflin went to the Philadelphia Museum of Art, at a steep discount, and three Jefferson items were bought by Monticello, where they had been during Thomas Jefferson's lifetime.

To get permission for these sales, HSP had to petition Orphan's Court. It did so, and the press got wind of the fact from people who did not agree with the decision to sell the four items and to decommission and transfer responsibility for HSP's museum functions and collections. The community quickly leapt to the conclusion that HSP was trying to pull a fast one and was about to deprive Philadelphians of key parts of their heritage. Nearly a decade later, there is still a substantial amount of residual anger as well as lack of understanding about HSP's purposes and motives in regard to its museum collections.

The Historical Society learned its lesson. When The Balch Institute for Ethnic Studies approached HSP in 2001 about merging, both the joint board and the joint staff merger teams spent significant time considering how best to explain the benefits of the merger and also how to interact with Balch donors and about those collections on loan to the Balch or, in the case of museum objects, outside of the future, merged institution's collecting policy. It has taken more than five years to research all the Balch collections, get in touch with as many of the donors and lenders as possible, to find intuitional homes for as many of the Balch artifacts as possible, to return loaned items that lenders would not give, and to weed and sell duplicates out of the combined Balch-HSP collections. Shortly, some 1,800 items from the Balch museum holdings that HSP could not place at museums will go up at auction locally. (See the attached press release.)

The merger led to a new collection policy that combined elements of both the Balch's and HSP's prior policies. (See the copies distributed.) The policy appeared in the membership news magazine and, since its approval by the board, has been used to identify out-of-scope materials. To gain shelf space, staff is deaccessioning large groups of these, mostly printed materials. When staff can find other collecting institutions to accept the material, HSP

gives them. With a few exceptions, the institution has been selling the balance to dealers, together with duplicates. A few incunabula, received in the 1860s from the Royal Library of Munich in exchange for American imprints, and an illuminated medieval manuscript went up at auction in London. The board decided that these items could be handled in this way, as they did not relate to the region's history.

The board and staff keep this point about relevance to the region very much in mind. That is why HSP is currently negotiating a steeply discounted sale of its second copy of the Leland-Boker edition of the Emancipation Proclamation, signed by Abraham Lincoln, to a colleague institution in the area. Even though HSP and four other area institutions also have copies, the board felt strongly that, as a chief custodian of the region's history, it needed to calculate the value to the public of access to the document in determining how and under what terms to sell a duplicate that HSP did not need.

On the other hand, yesterday the board had its first discussion of the sale at auction of several hundred thousand dollars worth of "orphaned" covers – that is envelopes with valuable postal markings that had been alienated from their contents by processing archivists over many decades. In this, HSP is



following the examples of, and the protocols used by, UNC-Chapel Hill, Yale, UVA, Duke, and a number of other institutions. In the future, HSP will sell more philatelic material and other ephemera, using the careful guidelines and procedures developed with board review. (See copies distributed.)

The catalog for the auction will indicate that the sales are for the benefit of the collections of The Historical Society of Pennsylvania. This does not mean paying for the light bill. Neither does it mean adding to the collection – normally, the preferred use of such monies. HSP's board instead has decided that the needs of the existing collections must be addressed, and the use of these funds for conservation equipment, grants matching, and the like will advance that agenda best.

As preparation for these deaccessions and sales go forward, HSP continues to add substantially to its holdings. The recently concluded strategic alliance with the Genealogical Society of Pennsylvania is bringing in thousands of printed titles and thousands of reels of microfilm, as well as roughly 400,000 manuscripts. As a result, HSP's collections will have grown by 2.5% in the current, 2006-2007 fiscal year.

Such growth would be irresponsible if HSP were not progressively addressing the needs of its collections and their users, concentrating its attention and resources accordingly. Staff estimates that it has \$12 million more work to do on the collections. The philatelic and other sales are a small step in that direction. The support being given by the Genealogical Society in order that HSP will be open additional hours is another incremental improvement in access.

In making these collecting, deaccessioning, sales, and other strategic decisions, HSP is asking always how best to fulfill its abiding mission to share the histories of Pennsylvania and its people. Clarity about the question and awareness of public concern are helping HSP answer this question with increased transparency and forethought. It is in these ways that HSP is at once seeking to maximize, share, and leverage the value of its collections, including those items it deaccessions after careful staff review and board consideration.