

Know Your Stuff: The Role of a Museum Board in Collections Policy
of Historical Societies

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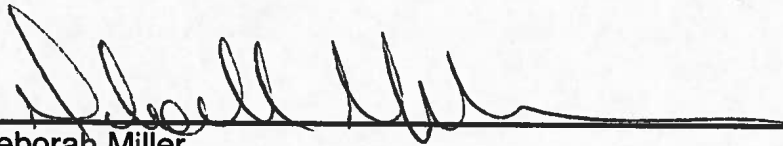
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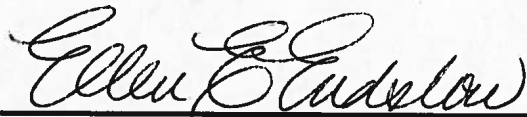
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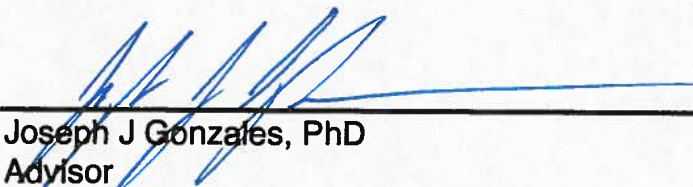
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Abstract

Boards of Historical Societies have an important job with regards to collections policy of their respective museum. These individuals may not be museum professionals and may not have the proper training to create a policy that effectively covers the important aspects of the collection in their care. With Historical Societies becoming less visible compared to their much larger counterparts, Boards must rely on volunteer members that may bring a different, needed knowledge base to the table (I.E. Law, Fundraising, or accounting). Nonetheless, these governing bodies should still have a sense of what makes for an effective Collections Management Policy in their museum. Information is key for the board to make informed decisions and provide effective guidance.

Dedication

I would like to dedicate this to my mother and father who supported me throughout my entire educational career and pushed me to be the person I am today!

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I would like to acknowledge first and foremost, my advisor, Joseph Gonzales. Without his help in figuring out where I wanted to take this thesis, I would still be trying to work out what exactly I wanted to focus on. Secondly, I would like to thank my committee members, Debbie Miller and Ellen Endslow, who have guided me down the right path by providing me with sound and insightful comments and suggestions. Without their help, I would surely be lost. Thirdly, I would like to acknowledge everyone who participated in my interview process: Margaret Johnson, Curator and Library Manager of the Delaware County Historical Society Research Library and Museum; Ellen Endslow, Director of Collections and Curator of the Chester County Historical Society; Mary Ann Jeavons, Retired Board member of the Delaware County Historical Society; and an Anonymous contributor from the Lancaster County Historical Society. Finally, I would also like to acknowledge my friends and family who have also provided me with assistance and encouragement throughout this process. They know who they are.

Table of Contents

| | |
|--|-----------|
| Copyright Page | i |
| Signature Page | ii |
| Abstract | iii |
| Dedication | iv |
| Acknowledgements | v |
| Table of Contents | vi |
| Nomenclature | vii |
| | |
| Introduction | 1 |
| Methodology | 5 |
| Literature Review | 7 |
| | |
| Section 1: History and Background | |
| - Historical Societies | 16 |
| - Boards | 17 |
| - Policy | 20 |
| | |
| Section 2: Why is the Boards Involvement in Collections Policy of Historical Societies Important? | 23 |
| Conclusion | 29 |
| | |
| Appendices | |
| 1. Flow of Collections Documentation | 31 |
| 2. Sample StEPs Program Workbook page | 32 |
| 3. Sample StEPs Brochure information page | 33 |
| 4. Fine Art, Jewelry, and Specie: Getting Beyond Legalese | 34 |
| 5. Important laws, regulations, and treaties affecting museum collections and collections management in the United States | 35 |
| | |
| Bibliography | 40 |
| | |
| Deliverable Attached: | |
| Know Your Stuff: Understanding Collections for Boards | |

Nomenclature

Accession: The process of taking legal ownership of an object or set of objects to hold in the public trust.¹

Board Bootcamp: Having the museum board immerse themselves in the daily activities of a museum in order to learn firsthand what they are meant to govern.²

Board of Directors/Trustees: The governing body of a museum

Collections Management Plan/Policy: Document, approved by the institution's Board, which specifies how collections will be acquired, accessioned, documented, stored, used, cared for, and disposed of.³

Collections Manager: One responsible for the planning and implementation of activities that ensures the long-term preservation outlook of the collection.⁴

Collections Staff: Those hired to care for a museum or library collection.

Curator: One who collects relevant works for the collection and interprets those works through exhibition, publication, and other means.⁵

Deaccession: The formal process of removing an accessioned object or group of objects from the museum's permanent collection.⁶

Duty of Care: Boards are liable for any gross negligence, even if care has been delegated to other staff.⁷

Duty of Loyalty: The Board has to hold the interests of the organization over any self-interest they may have.⁸

¹ Simmons, John E. *Things Great and Small : Collections Management Policy*. Washington, DC: American Association of Museum, 2013.

² Developed through personal interviews with Margaret Johnson, Mary Anne Jeavons, and Ellen Endslo.

³ Simmons, John E. *Things Great and Small : Collections Management Policy*. Washington, DC: American Association of Museum, 2013.

⁴ *ibid*

⁵ Fifield, Becky . "What is a Collections Manager?." *The Still Room*. 23 Apr. 2012.<<http://thestillroomblog.com/2012/04/23/museum-mond>>.

⁶ *ibid*

⁷ Malaro, Marie C., and Ildinko DeAngelis. *A Legal Primer on Managing Museum Collections*. Washington D.C.: Smithsonian Books, 2012.

⁸ *ibid*

Duty of Obedience: Boards have an obligation to make decisions that will benefit a museums mission and NOT stray.⁹

Ethics: A set of moral values or principles. For the sake of this research, ethics refers to the values for collections care and management established by field-wide consensus.¹⁰

Historical Society: A form of museum organization that collects, preserves, and researches items of historical significance, usually focusing on a specific geographical location.¹¹

Museum Collection: A collection of often unique objects that form the core of a museums activity¹²

Museum Professional: Someone who works, paid or unpaid, in a museum.

Native American Graves Protection and Repatriation Act (NAGPRA): a Federal law passed in 1990 that provides a process for museums and Federal agencies to return certain Native American cultural items (human remains, funerary objects, sacred objects, or objects of cultural patrimony) to lineal descendants, and culturally affiliated Indian tribes and Native Hawaiian organizations¹³.

Public Trust: A relationship in which the museum holds property that is administered for the benefit of the public¹⁴.

Registrar: An official keeper of collection records.¹⁵

Scope of Collection: A document used in planning that lays out the types of collections housed in a particular museum.¹⁶

Stewardship: The careful and responsible management of something entrusted to one's care.¹⁷ For the sake of this research, it refers specifically to the care of museum collections.

⁹ *ibid*

¹⁰ Merriam-Webster Dictionary. <www.merriam-webster.com>

¹¹ "Historical Society." *Wikipedia*. 3 Apr2013.<http://en.wikipedia.org/wiki/Historical_society>.

¹² "Collection (Artwork)." *Wikipedia*.<http://en.wikipedia.org/wiki/Museum_collection>.

¹³ "NAGPRA." *National Park Service*.<www.nps.gov/NAGPRA>.

¹⁴ Simmons, John E. *Things Great and Small : Collections Management Policy*. Washington, DC: American Association of Museum, 2013.

¹⁵ "Registrar." *Wikipedia*.<<http://en.wikipedia.org/wiki/Registrar>>.

¹⁶ "Scope of Collections Statement." *California Department of Parks and Recreation*.<<http://www.parks.ca.gov/>>.

¹⁷ Merriam-Webster Dictionary. <www.merriam-webster.com>

Organizations

AAM: American Alliance of Museums

AASLH: American Association for State and Local History

ICOM: The International Council of Museums

StEPs Program: A voluntary, self-assessment program developed by the Association for State and Local History for small and midsize museum, historic houses, historic societies, and other history organizations.¹⁸

¹⁸ Standards and Excellence Program for History Organizations." American Association for State and Local History. <<http://www.aaslh.org/steps.htm>>.

Introduction

“Good Governance is the foundation that enables a museum to succeed”

– AAM, National Standards and Best Practices¹⁹

What makes for an effective Museum Board? Odds are, the definition of an “Effective Board” will vary depending on whom you talk to. The effectiveness of a museum Board is dependent upon several factors including, but not limited to: knowledge, availability, dues paid, fundraising, and involvement. I understand this to mean a governing body that knows how to handle their museum in a proper and well-informed manner is present and involved in their daily operations. Unfortunately for many museums, which can often be the case for Historical Societies, their Boards may not possess all of the know how to provide effective leadership and guidance, especially for collections bases institutions.

What defines a Historical Society as a museum? Many may not have a physical or well defined area that they could call a “museum” per se, but the International Council of Museums, or ICOM, defines a museum as “a non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of

¹⁹ Merritt, Elizabeth E. National Standards and Best Practices. Washington, DC: American Association of Museum, 2008.

education, study and enjoyment.²⁰” Since Historical Societies primarily collect, preserve, and research the history around them, their definition as a “museum” is in line with that provided by the ICOM.

Historical Societies as museum organizations are usually small, understaffed, has limited funding, and is competing with other institutions for limited resources. To add to this challenge, visitation of Historical Societies has fallen in recent years and they are competing rigorously with each other for what little funding is available, with the recent financial crisis accentuating this issue²¹. This presents a problem that not only affects the Historical Society as a type of museum, but also effects the collection held in its public trust. By law, non-profit museums are the stewards of their collection, which means that they are meant to protect the objects entrusted into its care. This means that they have an ethical responsibility to the objects held in their charge. However, is this stewardship affected when the museums Board is less than knowledgeable in the nuances of proper Collections Management? Many, though not all, Board members do not have the training necessary to properly maintain an effective Collections Management Policy. If the policy suffers, the care, and subsequent state of the collection, could be in danger of disappearing or degrading.

Due to the voluntary nature of Board service, it is expected that Boards of organizations such as Historical Societies, are primarily made of individuals who

²⁰ "Museum Definition." International Council of Museums.<<http://icom.museum/the-vision/museum-definition/>>.

²¹ Debbie Doyle states this specifically in her article *The Future of Local Historical Societies* written for The American Historical Association.

have a passion or close connection to their chosen Society and are willing to put in the time and effort needed to be a part of the governing body. However, these individuals, as well intentioned as they are, may not be a museum professional, or someone who works in a museum, and could have little to no knowledge or experience of what is required to create and maintain an effective Collections Management policy.

Margaret Johnson, the Curator of the Delaware County Historical Society Research Library and Museum, commented that she feels that most Boards are disconnected from the goings on in their organization, though they are well intentioned, and suggested that the Board make time to come into the museum and learn about what it takes to care for the collection²². Ellen Endslow, the Director of Collections and Curator of the Chester County Historical Society, similarly, liked the idea of a “Board Bootcamp”²³. According to both interviewees, having the Board of Directors come interact with and learn about the collection is not only beneficial to the Museum, but also to the Boards’ advancement of their museum knowledge base. The idea presented here is that Boards should be aware of what type of collections the museum has, they should have a working understanding of the day-to-day activities of their collections staff, and additionally should be able to create a Collections Management Plan that best represents their Historical Society’s museum or library collection.

²² Johnson, Margaret, Personal Interview, August 31, 2013

²³ Endslow, Ellen. Personal Interview, September 13, 2013; Johnson, Margaret. Personal Interview, August 31, 2013

Hugh Genoways and Lynne Ireland state in their 2003 book, *Museum Administration: An Introduction*, “We conclude that not all people working in a museum (even some who have been employed by museums for long periods) are members of the profession.²⁴” This certainly extends to Boards knowledge of the museum collections and the policy used to govern them may be limited²⁵. Thus, working under the hypothesis that Board Members of certain Historical Societies are being utilized for other purposes based on institutional need (i.e. law, fundraising, or accounting). The issue could be a simple misunderstanding of what it takes to be on a Museum Board. Whether presumption, arrogance, or indifference, these misunderstanding could then lead to the aforementioned disconnects between a Historical Society Museum collections staff and the Board themselves.

The lack of Board knowledge with regards to collections policy and needs of the collection is, however, an undoubtedly fixable problem. Something as simple as providing Board Members with an easily understandable resource full of information they would find useful could make the difference in creating a secure place for the collections. The purpose of this thesis is to understand the role all museum Board Members play when creating collection policy, to highlight the basic information they should be aware of when deliberating on their museums collections in the form of a deliverable handbook to be attached at end of document, and to provide further resources for any Board Member or organization that may not be familiar with best

²⁴ Genoways, Hugh H., and Lynne Ireland. *Museum Administration: An Introduction*. Walnut Street, CA: AltaMira Press, 2003. Page 8

²⁵ This is not a universal assumption as it is completely feasible that a Board Member may be quite well informed in museum practice and the organizations collection is being maintained to the best possible standards.

practices. By creating a prototype handbook to be used as an educational tool for Boards to use to better understand their collection and what is expected of them with regards to safeguarding the objects under their stewardship, it is hoped to allow for more board education in the realm of museum Collections.

Methodology

Through extensive research into the museum policy, specifically types of governing models, and the history of Historical Societies in general, I have concentrated my focus on museum Boards, collections management, and collections management policies, with an emphasis on smaller Historical Societies. To enhance this research, I have also conducted interviews with members of the museum community. These interviews included: Mary Ann Jeavons, a former Board member of the Delaware County Historical Society; Margaret Johnson, current Curator of the Delaware County Historical Society; Ellen Endslow, Curator and Director of Collections at the Chester County Historical Society; and a Board member of the Lancaster County Historical Society who requested to remain anonymous.

My research has taken me to some places that I had anticipated, such as an under-informed Board being present. It has also brought me to places I had not expected like the suggestion of a “Board Bootcamp” in order to have the Museum Board immerse themselves in the daily activities in order to learn first hand what they are expected to govern. I anticipated that it would difficult to be able to schedule

meetings with these individuals, but I was pleasantly surprised that I had little to no trouble and everyone was extremely accommodating.

Literature Review

In a museum, policy is as important to the sustainability of the museum as the museum itself. For all intents and purposes, the relationship of the Board, or the governing body of a museum, and the physical collection of Historical Societies will be highlighted. Museums are stewards of their collection, and Boards are the stewards of their museum. As stewards, they are managers of something in their care. This something for museum Boards is the sustainability and success of their museum, of which collections management is an important piece. But what happens when a museum such as a Historical Society, with a varied and sometimes expansive collection, has a board who may not be a museum professional, but is feasibly a lawyer or an accountant whose skills could be applied to other aspects of museum governance but have no correlation to the museums collection? What information should an otherwise uninformed Board of Directors know about this sometimes confusing feature of a museum?

Boards are meant to protect and lead a museum into the future by providing guidelines for their staff to follow. Preserving the material collections of these organizations through a well-informed Collections Management Plan should be high priority as an object-based museum is nothing without its collection. As well intentioned as they may seem, some Boards do not possess the adequate knowledge base to properly support them maintenance of the collection of these institutions. So, what should they know in order to better provide for their museums collection?

Part One: Why Historical Societies?

To begin with, Historical Societies as a category are unique in the museum spectrum and present unique challenges for the staff and Board. The modern Historical Society is defined as a form of museum organization that collects, preserves, and researches objects of historical significance. These types of museums are usually Non-profits and can be in historical houses, farms, or living history establishments as well as a focus on a specific geographical area or a specific subject (railroads, aviation, etc.)²⁶. Traditionally, Historical Societies have been underfunded and understaffed volunteer establishments.

Nonetheless, because these organizations are generally underfunded and understaffed, which is complicated by the fact that they are forced to compete with each other for a limited pool of resources, they are the ones in the most desperate need of technical and financial help²⁷. Historical Societies are somewhat archaic when compared to larger marquee museums and as a result, visitation has suffered. Historically, these types of organizations are not a new concept as they have been around since 1791.

Concerned elite citizens during the last decade of the eighteenth century and the first two decades of the nineteenth century formed the earliest historical societies in the United States. While European countries had many excellent libraries and were beginning to form historical societies during the eighteenth century, the libraries of the United States were relatively insignificant, and there were few places to deposit important documents and manuscripts pertaining to the history of the developing nation. Recognizing that valuable materials were becoming lost or ruined, private benefactors such as

²⁶ "Historical Society." Wikipedia. 3 Apr. 2013.<http://en.wikipedia.org/wiki/Historical_society>

²⁷ Doyle, Debbie A.. "The Future of Local Historical Societies." American Historical Association. Dec. 2012

Reverend Jeremy Belknap, founder of the Massachusetts Historical Society in 1791, donated collections and money to budding organizations designed to collect and preserve items that would help future generations understand their American heritage. One of the primary activities of early societies, also seen as a preservation activity, included reprinting manuscripts for wider dissemination.²⁸

However, because of the abovementioned lack of resources to this specific type of institution, much of the day to day operation and management falls on the shoulders of select passionate individuals, staff and volunteer, who hope to see these legacies of the past survive into the next generation. These individuals, perhaps not influenced by a Museums Studies program that would nurture their expertise, are not always museum professionals and are making due with the information that is available to them. They are elected to the Board in order to preserve the society and all it's about, but are not always educated in the ways of collections management. "It would appear that the odds are against the long-term survival and success of these small and/or rural museums, as their budget size impedes their improvement and professional development."²⁹

Part Two: Board Responsibility

To understand why the creation of a collections policy is an important aspect of Board responsibility, we must also understand the Board's responsibility as a whole. Boards are created to be stewards of the museum that is held in the public trust. Public trust, or simply trust, is a relationship whereby a trustee (the Board)

²⁸ Lawrence, Sara . "History of Historical Societies in the U.S.." The Public History Resource Center. 23 Jan. 2004.<<http://www.publichistory.org/features/HistoricalSo>>

²⁹ Mid Atlantic Arts Alliance. Hidden Assets. Research on Small Museums

holds property (the museum and all its aspects) meant to be administered for the benefit of others (the public)³⁰. Upholding public trust is a very crucial goal of a Board member of any institution. The public can make or break a museum if this trust, both literally and figuratively, is broken.

Just as Boards are responsible for the financial and administrative oversight and planning to maintain trust, they should take steps to make sure this trust is in good standing with regards to the collection. This means making sure they have a plan for every possible outcome, including, but not limited to: insurance, decay, preservation, conservation, cataloguing, and pest management. This applies also to the ethics surrounding the collection as unethical practices can have an extreme impact on the value and safety of the collection. Boards should be aware of the ethical repercussions poor collections management plans can provide. The American Alliance of Museums, or AAM, offers an entire series on the best practices and codes of ethics on their website and how these codes effect everything surrounding the museum. AAM states:

A museum's code of ethics is founded on public accountability, public trust, and public service. For museums and their staff, operating and acting ethically means making decisions with these fundamentals at the forefront and ensuring that no individual associated with the museum personally benefits (especially financially) as a result. It is important that museums not only have a code of ethics but foster a culture of ethical practice and behavior³¹.

³⁰ Malero, Marie C., and Ildinko DeAngelis. A Legal Primer on Managing Museum Collection. Washington D.C.: Smithsonian Books, 2012.

³¹ "What is Ethics?." American Alliance of Museums. <<http://www.aam-us.org/resources/ethics-standards-a>>.

Boards have a responsibility to assure they are working within the ethical parameters of acceptable museum practice. This means that they have three main duties to the organization that will ensure that they are acting in perpetuity of the museum as an institution. These are:

- *Duty of Care*³²: Boards are liable for any gross negligence associated with the institution, even if the instruction was delegated away to the Director.
- *Duty of Loyalty*³³: The Board has a duty to hold the interests of the organization above any self interests they may have. This is important especially when dealing in matters of policy as it is very easy to write a line in that allows for benefits that may not be to the museums benefit.
- *Duty of Obedience*³⁴: Boards have an obligation to make decisions that will benefit the museums mission and not stray. The mission is the driving force behind a museum; it states in a small description what there museum is all about. It dictates every aspect of the museum and its constituents.

Board structure can also effect how the organization is operating with regards to the collection. Boards typically dictate policy to the employees through annual, bi-annual, monthly, or weekly meetings where decisions from committees – specifically, in this case, the collections committee – are handed down to other members. The committee may include other Board members, a director, a curator, or other staff interested into the collections preservation and conservation committee³⁵. These

³² Ibid.

³³ Ibid.

³⁴ Ibid.

³⁵ Ibid.

committees, along with the Board, make collections related decisions where the Board has the privilege to make the final decision on big-ticket items (vehicles, large pieces, etc.) and the handing down of policy.

Yet, when Boards are created, pitfalls still exist and can affect the museums collection as a whole. During the *Virginia Museum Fundamentals Forum* held at James Madison University in 2004, some of these pitfalls were highlighted and include building a Board consisting of possible conflicts of interest that go completely against the Boards *Duty of Loyalty*. It is in the Boards, and ultimately the museums, best interest to avoid integrating the following types of individuals onto the Museums Board:

- Collectors: may have an avid interest in your museum but may not be able to make unbiased decisions concerning museums objects in their area of interest³⁶.
- Social Climbers: May only want the social recognition associated with serving on the Board³⁷
- Vendors: Those who could profit from doing business with the museum.
- Competitors who serve of competing Boards: These individuals may not be able to approach potential donors without showing favoritism³⁸.

³⁶ Virginia Association of Museums. Virginia Foundation for the Humanities. Virginia Museum Fundamentals Forum. James Madison University, 2004.

³⁷ *ibid*

³⁸ *ibid*

- Museum Employees: Refers to the division between Board and Staff. Assessment of that staff member's performance than becomes compromised³⁹.

Boards should also be aware of the laws inherent in their governing state. These laws can be accessed through their Attorney Generals Office, and be aware of federal and state laws regarding collections. This is to make sure that their responsibility is in accordance with recognized federal and state laws, which will better aid in the sustainability of the Historical Society as a whole.

Part Three: Collections Management Policy

Creating policies is an integral part of the museum Board responsibility. They must make sure there are effective and well-organized strategies to protect the collection. John Simmons states in his 2006 book, *Things Great and Small: Collections Management Policies*, "The Collections management policy is one of the overall institutional policies that guide the museum in fulfilling its public trust."⁴⁰ In essence, the author is stating that without an effective policy in place for the museums collection, there is a loss of confidence by the public. For the most part, collections are what people think of when they decide to visit a museum. It's not always a matter of what museum the visitor is visiting, but it is often a matter of what they are going to see that is driving them to the museum. Maintaining these objects, especially in a Historical Society, is crucial. However, because of lack of resources,

³⁹ *ibid*

⁴⁰ Simmons, John E. *Things Great and Small : Collections Management Policy*. Washington, DC: American Association of Museum, 2013.

these institutions are suffering. For example, “more than 50 percent of the 150 historical museums in the state of Utah have a budget of under \$25,000 a year, according to the Utah Humanities Council”⁴¹.

Because these small organizations are surviving on a severe lack of resources, the policy created for the collection is the best way to protect the material culture of the institution. These policies can range from large, drawn out how-to guides, or could be a simple, layman’s terms policy that highlights the important sections every policy should have. These policies should cover all of the important aspects of what protecting and conserving a historical collection means. (See Appendix 1)

What are the important aspects? *Things Great and Small* also states “Collections Management Policies sometimes include an overarching statement of commitment to collections stewardship that highlights the value the museum places on this part of its mission.”⁴² *AAMs Accreditation Commission’s Expectations Regarding Collection Stewardship* defines stewardship as “The careful, sound, and responsible management of that which is entrusted in your care.”⁴³

Before writing their collections plan, the Board should make sure to define the type of policy that will best fit their type of institution. After they have established this, defining other aspects of the plan is the next obvious step. These could include:

⁴¹ Doyle, Debbie A.. "The Future of Local Historical Societies." American Historical Association. Dec. 2012. <<http://www.historians.org/publications-and-directo>>.

⁴² ⁴² Simmons, John E. *Things Great and Small : Collections Management Policy*. Washington, DC: American Association of Museum, 2013.

⁴³ Quoted in Simmons, *Things Great and Small*. See also: "Collections Stewardship." American Alliance of Museums. <<http://www.aam-us.org/resources/resource-library/c>>

- Scope of Collections, a document used in planning that lays out the types of collections housed in a particular museum.⁴⁴
- The ethical responsibilities and standards surrounding the collection
- Collections Categories
- Authority: Delegation of decision making responsibilities among staff, committees, and board members
- Record keeping
- How the museums will handle objects found in the collection that may be abandoned property or an unclaimed loan;
- Access to the collection
- Rights and Reproductions⁴⁵

This document should provide the Board with the information and guidance to be able to make ethical judgment calls on all collections policy material.

Essentially, what is important for Boards to remember about their Collections Management Policies is that they should be making sure it follows the museums mission, which should already be well-defined, and that they comprehend what it means to be the steward of the collection. Boards should make sure that all responsible parties be provided any and all information created, and that staff is then able to reflect these policies when dealing with the handling and management of the museum collection.

⁴⁴ "Scope of Collections Statement." California Department of Parks and Recreation. <<http://www.parks.ca.gov/>>.

⁴⁵ "Information Center Fact Sheet: Writing a Collections Management Policy." American Association of Museums. 2004. Quoted in: Virginia Museum Fundamentals Forum, 2004

History and Background

Historical Societies

To understand why a Boards relationship to the collections of Historical Societies is a problem, we must first understand the background of Historical Societies as a whole and how they arrived at the type of organization they are today. Historical Societies have been around for more than a century and are an essential part of collecting and protecting knowledge. However, Because of lack of funding or lack of interest, these institutions have begun to suffer which is affecting aspects of the collections housed within their walls.

Beginning in the 1790's through the early 19th century, upper class citizens became concerned about the security of the manuscripts and documentation of the history of the new American nation. In order to preserve and maintain these important documents, many of these individuals created the earliest Historical Societies in the United States⁴⁶. "Recognizing that valuable materials were becoming lost or ruined, private benefactors such as Reverend Jeremy Belknap, founder of the Massachusetts Historical Society in 1791, donated collections and money to budding organizations designed to collect and preserve items that would help future generations understand their American heritage."⁴⁷

Because these types of institutions vary in area of interest, size, function, and motivation, they are particularly difficult to define. A working definition for a Historical

⁴⁶ Lawrence, Sara . "History of Historical Societies in the U.S.." The Public History Resource Center. 24 Jan. 2004.<<http://www.publichistory.org/features/HistoricalSo>>

⁴⁷ Ibid.

Society is “An organization that collects, preserves, and researches items of historical significance, usually focusing on a specific geographical location.”⁴⁸ These types of institutions are an important way to collect and preserve history. Functionally, these organizations provide a more open approach to the public by allowing them the opportunity to interact with their own history through more accessible means. Margaret Johnson, Curator of the Delaware County Historical Society Research Library and Museum, states that the primary audience of her organization is not coming to see the collection, but rather those coming to do research or genealogy⁴⁹. So, if these institutions are moving to a more research driven structure, where does that leave the museums collection? This may not apply to all Historical Societies, but if a trend begins to present itself, than a moving away from the collection as the main focus of Historical Society Museums presents a larger danger to the longevity of certain pieces of the museums physical material.

Boards

“The Governing Authority fulfills the basic responsibilities of nonprofit governance by: Determining the organizations mission and purpose; selecting chief executive and supporting and assessing his or her performance; ensuring effective organizational planning and adequate resources; managing resources effectively

⁴⁸ "Historical Society." Wikipedia. 3 Apr. 2013.<http://en.wikipedia.org/wiki/Historical_society>

⁴⁹ Johnson, Margaret. Personal interview. 31 Aug. 2013.

(including exercising good stewardship of collections and historic structures, if applicable)...”⁵⁰

It is tough to pinpoint the history of a Museum Board, or the governing body of a museum, as they are established when an institution is founded. Many Boards today used the method for board structure established by General Henry M. Robert who was born in 1837 and was a student of Parliamentary Law, which led him to publish *Robert’s Rules of Order* in 1876⁵¹. This historic book established the methods with which Boards meet and hand down policy. The book lays out the procedure for holding board meetings using the US government as a template. General Robert wrote his rules in response to his performance in a conflict at an Abolitionist meeting at the First Baptist Church in New Bedford, MA and vowed he would learn parliamentary procedures before attending another meeting⁵². He never intended these rules to be used in state or legislative meetings, but rather to be a guideline for the everyman.

Boards are responsible for keeping the museum up and running not only financially, but also providing an authorities leadership for the rest of the museum. They have specific, as well as implied, set of duties to carry out related to the museums sustainability and care. It is also important to note that Boards also have to use discretion in determining how to achieve these tasks⁵³ as there is no definitive

⁵⁰ Merritt, Elizabeth E. National standards and Best Practices. Washington, DC: American Association of Museum, 2008.

⁵¹ Robert III, General Henry M..Roberts Rules of Order: Newly Revised. Sarasota, FL: Da Capo Press, 1876-2011.

⁵² "Henry Martyn Robert." Wikipedia.<http://en.wikipedia.org/wiki/Henry_Martyn_Robert>.

⁵³ Malero, Marie C., and Ildinko DeAngelis. A Legal Primer on Managing Museum Collections. Washington D.C.: Smithsonian Books, 2012.

set of enforceable rules. This leads to the three duties that should motivate the collections policy creation and implementation of all Museum Boards, regardless of type of institution. They are the *Duty of Care*, *Duty of Loyalty*, and the *Duty of Obedience*⁵⁴.

These duties should drive all decisions made, especially with regards to the collection policy. Boards have a responsibility to maintain the collection through the setting down of guidelines to the collections staff in an informed and appropriate manner. Through them, the Collections Staff can then set out to preserve, interpret, and learn from the objects in their care.

It comes back to the idea of providing a possibly under informed Board of Directors with the tools to effectively create policies that allow the collection housed in these Historical Societies to be preserved, expanded upon, and thrive. Historical Societies do not have suffer as long as they are well taken care of, and the first step to sustainability into the future is to make sure its policy is sound, adjusted and improved upon annually, and well educated. Board of these institutions do not have to struggle to understand what goes on, collections wise, in the larger, more well funded institutions because there is information out there for them.

⁵⁴ Malero, Marie C., and Ildinko DeAngelis. A Legal Primer on Managing Museum Collections. Washington D.C.: Smithsonian Books, 2012.

Policy and Plans

The American Alliance of Museums is a world leader in the standards of practices in museums. The AAM annually amends its policies to reflect the changing world around it and relays this information to the museum professional around the United States and the World. Through their website, many museums have access to information that can help their museums thrive in the changing museum market.

Also, a more practical advantage that many Historical Societies have is the American Association for State and Local History, or AASLH. This organization focuses its attention on the small museums such as Historical Societies, and prides itself on providing these organizations with many up to date resources. The AASLH has also implemented the StEPs program, or the Standards and Excellence Program for history organizations. This program provides small museums with a tool to learn just what it takes to sustain a museum under national standards as well as focusing on stewardship and the collection, a useful guide for boards to be aware of⁵⁵⁵⁶(See appendix 2). Once a museum has enrolled in this program, they can gain valuable information for the staff and volunteers, as well as board members, including improved policies and practices⁵⁷. (See appendix 3)

It is safe to assume, at least in the United States, that the AAMs “National Standards and Best Practices for US Museums” is the prevailing information repository for nonprofit governing boards to follow with regards to policy and ethics.

⁵⁵ See appendix 2 for a sample of the StEPs Program workbook, Stewardship and Collections section

⁵⁶ "Standards and Excellence Program for History Organizations." American Association for State and Local History. <<http://www.aaslh.org/steps.htm>>.

⁵⁷ See Appendix 3 for a sample from the StEPs program Brochure.

Though these standards and practices are not legally enforceable, they are the best way for museums to gain and hold onto their public trust. Following the AAM standards with regards to collections is another way for Museum Boards to properly assemble their relating policy and safeguard the objects in their care.

But, why is having a collections plan and policy important to the collection? A collections management policy is a detailed written statement that features the museums professional standards regarding the collection in their care and could cover a broad range of relevant topics⁵⁸:

- The museums collection goals
- The method of acquiring and disposing objects from the collection
- Loan policies
- Object handling, care, and control
- Insurance
- Creation and maintenance of the collection
- Record keeping procedures

There are several guidelines for creating an effective plan and these can be greatly informed by having Board consulting with the collections staff. The Board should firstly clearly identify areas of responsibility and identify the staff member who has the final decision making authority when it comes to collections. Next, a detailed definition of what make up the collection sometimes referred to as a Scope of Collections or Statement of Purpose, should be drafted. Finally, the Board should

⁵⁸ Malaro, Marie C., and Ildinko DeAngelis. A Legal Primer on Managing Museum Collections. Washington D.C.: Smithsonian Books, 2012.

identify how the institution will handle loans, acquisitions, disposal, and insurance practices that best suit the type of collection housed in the institution. (See Appendix 4 for more information on Museum Insurance)

Why is the Boards' involvement in Collections Policy in Historical Societies Important?

“Yet Beneath this vast array of diversity, the Historical Society represents a common belief that our ideals and responsibilities as historians require renewal, that contemporary events threaten to compromise those ideals, and the burning question about the state of the profession must be engaged, even if we differ over the answers”⁵⁹

The modern Historical Society is in trouble, though many may not think this the case. These institutions are seemingly caught in a vicious cycle of survival and expansions where they cannot gain resources or grants from the decreasing pool provided by the federal government and other sources, which means they may not be able to expand their building space or storage, they cannot allow for new programming because the funding is not available, which drops the attendance of visitors, all of which effects grant proposals and the cycle starts again. Debbie Ann Doyle, the coordinator of committees and public history contact for the American Historical Association, states in her 2012 article, *The Future of Local Historical Societies*:

An informal poll on the AASLH LinkedIn page suggested that approximately 15 percent of local historical societies are staffed entirely by volunteers, 25 percent by volunteers and a part-time staff member, and only 25 percent have more than one professional staff member. This

⁵⁹ *Reconstructing History: The Emergence of a New Historical Society*. New York, NY: Routledge, 1999.

*means both that staff resources are stretched thin and that many historical societies are run by people with little formal training in history.*⁶⁰

She Also States in the same article which highlight another growing problem:

*Recent financial crises have also impacted the field. Local societies that rely on grants or subsidies from the local and state government increasingly faced draconian budget cuts, while competing for an ever-shrinking pool of private and government grant money. As a result, many societies simply don't have the resources to update their exhibits or conservation practices.*⁶¹

Doyle highlights why these types of institutions are in danger. The Board of a Historical Society should be able to realize that the survivability and sustainability revolves around having things for visitors to “see” as well as research. Should an inexperienced board have issues creating effective policies for their staff, which, in Historical Societies are primarily volunteers with little to no experience as a museum professional⁶², then the policies meant to protect the collection may not get the attention they deserve from the staff. Genoways and Ireland state, “The collections not only give the museum its character, but also define the purpose of the museum.”⁶³ As the central aspect of why a museum exists, these collections should be maintained in the best and most efficient way possible. Unfortunately, with regards to Historical Societies, the Board may be under informed, through no fault of their own, on what it takes to protect these objects. As mentioned previously, I am working under the assumption that these Board members, though well intentioned,

⁶⁰ Doyle, Debbie A.. "The Future of Local Historical Societies." American Historical Association. Dec. 2012. <<http://www.historians.org/publications-and-directo>>.

⁶¹ *ibid*

⁶² *ibid*

⁶³ Genoways, Hugh H., and Lynne Ireland. Museum Administration: An Introduction. Walnut Street, CA: AltaMira Press, 2003.

may not have the museum background needed to create an effective policy. These individuals are those are likely but not guaranteed to have a passion for what the Historical Society stands for and are willing to put in the time an effort to govern the small institution, but may have no experience in the museum world or creating an effective policy for objects they may not completely understand. These members may also be utilized for other, non-museum professional abilities that they may possess (for example, a lawyer to provide legal advice, a bookkeeper to aid in financial record keeping, or an accountant to help with finance issues or taxes). Though there is nothing wrong with this practice, and may even be encouraged, it is reasonable to assume that an accountant may be a history lover and have an appreciation for an object, but not the experience necessary to properly maintain that piece.

Simmons says in *Things Great and Small*, “Museums have both a legal and an ethical obligation to provide proper care for their collections.”⁶⁴ Boards should know that a museums collection has a need to be as stable as possible, which means that provisions should be made to gather materials and space to provide for this need. Boards should also know that there are certain laws that protect certain aspects of their collection and should be mindful of these before considering acquiring an object or deaccessioning it. Boards should be responsible for any acquisition that is appraised over \$10,000 and make the final decision on

⁶⁴ Simmons, John E. *Things Great and Small : Collections Management Policy*. Washington, DC: American Association of Museum, 2013.

procurement⁶⁵. However, an inexperienced Board may not be aware of these examples of procedure.

One of the ways to solve this problem, as suggested by both Margaret Johnson⁶⁶ and Ellen Endslow⁶⁷, is to have members of the Museums Board spend time with the collections and staff. The idea behind this is to have the Board become accustomed to what is housed in their collection, understand what their collection staff does on a daily basis, and to recognize what the professional staff has recommended in new or revised policies and then improve these policies accordingly. Involving the Board with the collection is a great way to enhance their knowledge of the collections, but there is a drawback to this as well. The issue surrounds the board finding the time to come in and put in the time needed to gain an adequate grasp on the collection. Board Members have other jobs and lives outside of the museum world. Having them take the time to come in and learn a working knowledge of the collections process is something that sounds great on paper but is ultimately not a feasible way to go about educating them.

Also, because of many Board members lack collections knowledge, certain questionable practices could occur and go unnoticed. Inappropriate acquisitions or holdings of materials that do not align with the museums mission, a no-no in the museum world; violation of local, state, or federal laws such as the Native American Graves Protection and Repatriation Act (NAGPRA); appraising their own objects,

⁶⁵ Genoways, Hugh H., and Lynne Ireland. Museum Administration: An Introduction. Walnut Street, CA: AltaMira Press, 2003.

⁶⁶ Johnson, Margaret, Personal Interview, 31 Aug 2013

⁶⁷ Endslow, Ellen, Personal Interview, 13 Sept 2013

which is unethical within a museums collection; allowing too much or too little access to the collection; inadequate security for the collection that could result in damage or theft of collection components; inappropriate storage; unethical Deaccessioning of materials or using deaccessioning funds to pay for non preservation or collections material that relates to the mission⁶⁸. Boards should realize that although acquiring a collection is important, they should also consider the following:

*Taking an entire collection to get the one or two objects the museum really needs puts the museum in a complicated and costly situation...All of the objects that come in must be processed, which, if they are handled properly, takes staff time...The objects must be stored, and the storage space, since it is to be of museum quality, must be climate controlled and secure. HVAC systems and security personnel's salaries cost a great deal of money. The objects will not be stored for a week or a year but potentially forever. The decision to accept unwanted [objects] ultimately costs not just the initial staff time but also an escalating amount per year for storage and overhead.*⁶⁹

Policy can have a huge impact on the collection. If completed improperly, it could even lead to the permanent damage of objects, the loss of materials, and ultimately, the loss of public trust. This is why a museum Board should have a clear and concise collections management plan that highlights the procedures that surround the administration of the collection. A proper collections management plan should include:

- The collections mission and Scope of Collection
- Insurance needs

⁶⁸ Genoways, Hugh H., and Lynne Ireland. Museum Administration: An Introduction. Walnut Street, CA: AltaMira Press, 2003. page 175-194

⁶⁹ Buck, Rebecca A, and Jean Gilmore. Collection Conundrums : Solving Collections Management Mysteries. Washington, DC: American Association of Museum, 2013.

- Emergency planning and preparedness
- Accession and deaccession procedure
- Loans
- Collection access
- Care of the collection⁷⁰.

A Collections Plan can and should be informed by the collections staff (Curator, Collections Manager, and/or Registrar). However, because Historical Societies are smaller and usually underfunded institutions, it is quite possible that the collections staff could be comprised of one, two, three of these types of staff members. It's also possible that an institution could have one staff member doing the job of all three. This is why the Board of a Historical Society should arm themselves with as much information as possible.

Because Boards are meant to create and/or help revise the policy surrounding the collections, it's reasonable to assume that the policies can then have an impact on the Board themselves. Museums are held in Public Trust and when that trust is broken, it is the Board that suffers because it is the Board who should have known better. Having a working knowledge of what makes for an effective policy in order to have a strong public image is a paramount aspect of a Boards job.

⁷⁰ Genoways, Hugh H., and Lynne Ireland. Museum Administration: An Introduction. Walnut Street, CA: AltaMira Press, 2003, page 175-176

Conclusion

Finally, a museum Board is the governing body that creates and dictates procedure for every museum aspect including Collections Policy. The better informed a Board is about its collection staff and collections policy, the better it functions. As a governing body, these individuals have to use their own discretion to make sure they are putting into place practices that will best serve the museum and its mission. This is an effective way for boards to ensure the survivability and sustainability of their Historical Society. There is no need for these institutions or their collections to fade away.

Not all is lost to the modern Historical Society. Due to recent crises, steps have been talked to help educate those involved in the care and preservation of these small organizations and their collections:

*"The StEPS program of the AASLH is a series of workbooks and self-study guides that help societies assess their governance, interpretation, collections care, and management, and to develop an improvement plan. State humanities councils are also working to support the local groups through programs such as Utah's museum interpretation initiative, a series of workshops to train volunteers to research and document objects and design exhibits."*⁷¹

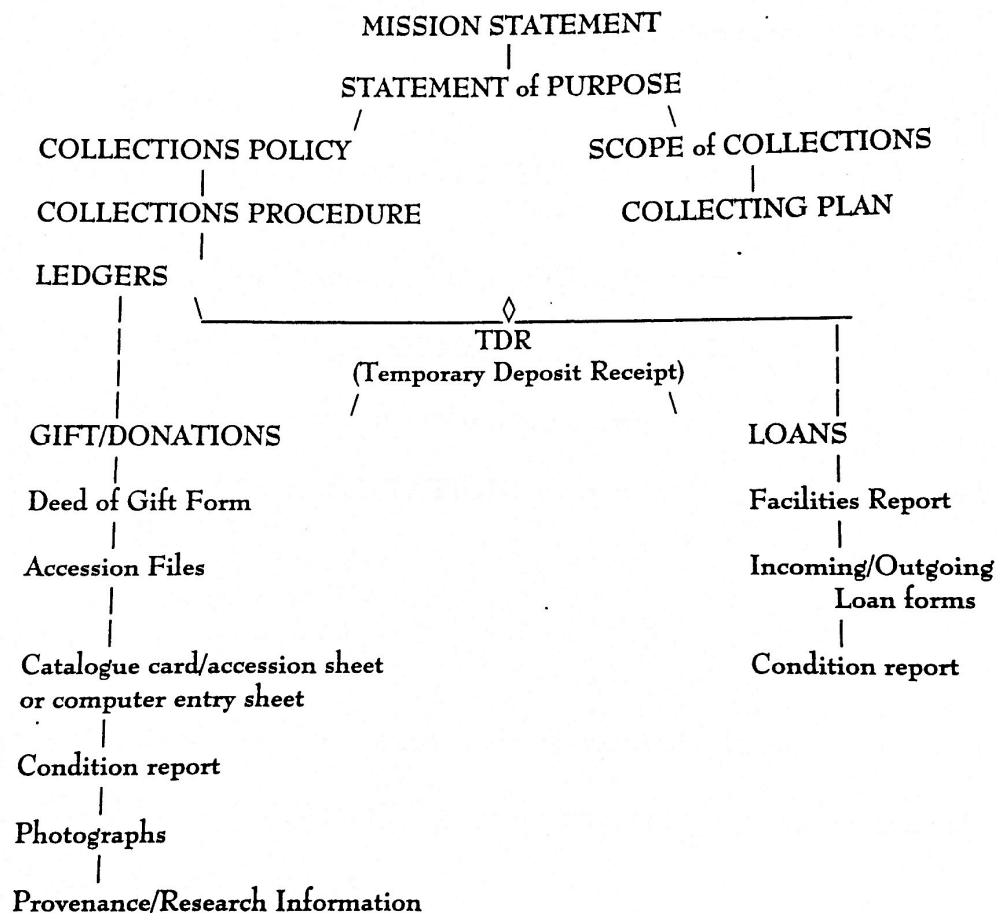
Attached to this thesis is a handbook of material meant to assist a Museums Board, much like Doyle lists in her article. It contains helpful information on dealing with collections policy, management, and procedure. It is meant to be a tool used by someone who is not a museum professional and is unfamiliar with the museum

⁷¹ Doyle, Debbie A.. "The Future of Local Historical Societies." American Historical Association. Dec. 2012. <<http://www.historians.org/publications-and-directo>>.

standards by highlighting the important aspects of a collections policy. These are relevant to most institutions, but are meant to be used by the Boards of a smaller organization such as a Historical Society.

Appendix 1⁷²

Flow of Collections Documentation



Llh/vls; 4/99; revised, 5/01

⁷² ⁷² Virginia Association of Museums. Virginia Foundation for the Humanities. Virginia Museum Fundamentals Forum. James Madison University, 2004.

Appendix 2⁷³

StEPs

MVG AUD INT **COLL** HSL MGMT

| Standards | Self-assessment Questions | Performance Indicators |
|---|--|--|
| COLL Standard 2: The institution legally, ethically, and effectively manages, documents, cares for, and uses the collections. | I. Are there written procedures for acquiring, borrowing, and lending collection items? | Basic <input type="checkbox"/> The institution uses a written donor form for artifacts and archival items accepted into its collections. <input type="checkbox"/> The institution uses a written loan agreement for each in-coming and out-going loan transaction that involves collection items. <input type="checkbox"/> All loans are for a specified time period. |
| | J. Are there written procedures for deaccession and disposal of collection items? | Good <input type="checkbox"/> There are written procedures for acquiring, borrowing, and lending artifacts and archival items included in the collections policy. |
| | | Better <input type="checkbox"/> The institution reviews and updates its procedures on a regular basis. <input type="checkbox"/> The institution requires condition reports for all in-coming and out-going loans. |
| | | Basic <input type="checkbox"/> The institution keeps records relating to the deaccession and disposal of artifacts and archival collection items. |
| | | Good <input type="checkbox"/> The institution has written procedures for deaccessioning and disposing of artifacts and archival items included in the collections policy. |
| | | Better <input type="checkbox"/> Procedures include a formal review process and transactions are documented in writing. |

⁷³ "Standards and Excellence Program for History Organizations." American Association for State and Local History. <<http://www.aaslh.org/steps.htm>>.

Appendix 3⁷⁴

StEPs is a voluntary, self-assessment program developed by the American Association for State and Local History for small- and mid-sized museums, historic houses, historical societies, and other history organizations. This new, self-study program uses assessment questions and performance indicators (Basic, Good, Better) to rate your policies and practices in six standards sections. Your organization will clearly identify and document strengths and areas needing improvement so you can begin taking steps to plan for positive change.

The six standards sections are:

- 1 MISSION, VISION, AND GOVERNANCE**
- 2 AUDIENCE**
- 3 INTERPRETATION**
- 4 STEWARDSHIP OF COLLECTIONS**
- 5 STEWARDSHIP OF HISTORIC STRUCTURES AND LANDSCAPES**
- 6 MANAGEMENT**



"The StEPs program is probably the greatest thing to come along for small museums in the last decade or so. As a service provider for small museums I am planning to incorporate StEPs into all of my programming from workshops, to assessments, to technical support."

—Scott Carlee, Alaska State Museum, Juneau, Alaska

⁷⁴ "Standards and Excellence Program for History Organizations." American Association for State and Local History. <<http://www.aaslh.org/steps.htm>>.

Appendix 4⁷⁵

FINE ART, JEWELLERY & SPECIE GETTING BEYOND LEGALESE

PROPERTY INSURED/COVERED

Key areas of insurance for collections. Check that what you want covered – is covered.

A. "This policy covers all bona fide works of art, of rarity, historic value or artistic merit (scientific, technological, cultural value), including paintings, pictures (including frames and glass), prints, pastels, watercolors, engravings, etchings, photographs, rugs, tapestries, textiles, bronzes, marble and other statuary, potteries, porcelains...

being the property:

- of the Insured, (owned by you)
- the property of others, (on extended or temporary loan) for which the Insured may be liable or have been instructed to insure"

or

B. "This policy covers Fine Arts of whatsoever nature being that is owned by or in the care, custody and control of the Assured"

2 | COLLECTIONS INSURANCE BASICS: GETTING BEYOND LEGALESE

LEGAL LIABILITY

Covers the liability of the Insured as bailee of all loan properties (i.e. in your care, custody and control) on which the Insured has been instructed NOT to insure (in event of an action for loss or damage to such property the company is to deal – to the monetary extent of the interest in this insurance).

Check to see if your Legal Liability coverage is as broad as you expect and want

INSURANCE CLAUSE STATEMENT

Check that the perils you want the object insured against are covered. "This policy insures against all risks of physical loss or damage, except"

Note, this is very different from a named perils policy

PERILS EXCLUDED

Specialist fine art policy standard exclusions:
loss/damage caused by:

- wear, tear, gradual deterioration, moths, vermin, inherent vice, loss or damage sustained due to or resulting from any repairing, restoration or retouching process
- shipments by mail, unless registered first class
- war, government action civil war, (terrorism)
- nuclear reaction and radiation

VALUATION

Check that your valuation clause is appropriate for your needs.

- **Permanent collection** – (Your collection) current market value at time of loss
- **Loan collection** at an agreed amount between Insured and owners (specify in writing), otherwise, current market value.

BELLS AND WHISTLES

Coverage extensions offered by some carriers:

- business paper and records - costs to replace
- equipment and tools, packaging materials
- cost of preparing inventory
- debris removal
- recharge fire protective systems @ \$25,000

For these additional coverages, check to be sure that they are important. If NOT covered under your property policy, they become very important.

COLLECTIONS INSURANCE BASICS: GETTING BEYOND LEGALESE

⁷⁵ Willis of New York, Inc. Advertisement. Fine Art, Jewellery, and Specie: Getting Beyond Legalese.

Appendix 5: Important laws, regulations, and treaties affecting museum collections and collections management in the United States. (Simmons, Table C.1.)

A

Abandoned Shipwreck Act: Protects underwater archaeological treasures

African Elephant Conservation Act: Protects the importation of raw ivory and restricts the importation of worked ivory.

Antarctic Conservation Act: Prohibits taking native antarctic wildlife or plants

Antiquities Act of 1906: Protect historic and prehistoric ruins and monuments on public lands

Archaeological Resources Protection Act (ARPA): Prohibits the sale, purchase, transport, exchange, or receipt of archaeological resources removed without permission after 1979.

Architectural Works Copyright Protection Act: Protects architecture as a form of artistic expression by providing protection through the Copyright Act.

Arts and Artifact Indemnity Act. As Ammended: Provides museum artifacts immunity from seizure under certain circumstances.

B

Bald and Golden Eagle Protection Act: Act makes it illegal to take, buy, sell, purchase, or barter eagles or eagle parts.

C

Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property (UNESCO Convention): Parties to the convention oppose all "import, export, and transfer of ownership of cultural property."

Convention on Cultural Property Implimentation Act (CCPIA): Makes cultural treasures subject to seizure if imported into the US in violation of the laws of the country of origin.

Convention on International Trade of Endangered Species of Wild Flora and Fauna (CITES): Controls the international trafficking of species threatened by commercial trade.

Copyright Act: Protection for copyrighted works, published or unpublished.

Curation of Federaly Owned and Administered Archaeological Collections: Established standards of care of federally owned collections.

E

Endangered Species Act: Protects certain species of animals and plants

F

Fredom of Infromation Act: Established the standards for determining which records should be disclosed and which can be withheld.

H

Hague Convention for the Protection of Cultural Property in the Event of Armed Conflict: Protects cultural property during wartime.

Historic Sites Act of 1935: meant to strengthen the Antiquities Act of 1906, preserves historic sites and objects of national significance for public use.

I

Immunity from Seizure Statute: Provides artifacts with limited protecteion from serzure in particular circumstances.

L

Lacey Act of 1900: Prohibits the importation, exportation, transport, sale, acquisition, or purchase of any animal or plant that was obtained or transported in violation of any other laws or regulations.

M

Marine Mammal Protection Act: Bans the importation of marine mammals or marine mammal parts (including whale bone).

Migratory Bird Treaty Act: Prohibits killing, capture, possessing, buying, selling, import or export of migratory birds, including nests and eggs.

N

National Environmental Policy Act: Required consideration of environmental and cultural values as well as economic and technological in assessing proposed federal projects.

National Film Preservation Act: Established to preserve significant films.

National Foundation on the Arts and Humanities: Protects artists and artistic expression.

National Historic Preservation Act: Provides broad base of federal protection for significant domestic cultural resources.

National Stolen Property Act: Applied to encroachments on legitimate and clear ownership rights on imported objects (including stolen and looted materials).

National Trust for Historic Preservation: Established a private Non-profit corporation to receive donated sites, buildings, and objects significant to US history and culture to preserve and administer them for the benefit of the public.

Native American Graves Protection and Repatriation Act: Guides museums to deal

with culturally significant items belonging to Native Americans. These include human remains, funerary objects, sacred objects, or objects of cultural patrimony.

O

Old Loan Legislation: Legislation that allows museums to take possession of unclaimed objects (varies from state to state).

P

Pre-Colombian Art Act: Prohibits the importation into the US any Pre-Colombian materials without certificate of exportation from country of origin.

R

Rights of Privacy and Publicity: Prevents unauthorized commercial use of person's name, likeness, or other recognizable aspects. Gives the individual exclusive rights to the uses of his or her own identity.

S

State Preservation Laws: Various state-level legislations that vary in scope.

T

Tax Reform Act of 1984: Requires museums to notify donors and IRS when certain donated property is sold, transferred, or otherwise within two years of Date of Gift.

U

Unidroit Convention on Stolen or Illegally Exported Cultural Objects: Enforces the repatriation of cultural property. (i.e. Nazi-loot)

V

Visual Artists Rights Act: Protects artist rights of attribution and integrity.

W

Wild Exotic Bird Conservation Act: Prohibits the Importation of exotic birds in violation of other laws and regulations.

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