Collections Policy
&
Procedures Manual
MISSION STATEMENT FOR THE FRIENDS COLLECTIONS COMMITTEE

The mission of the Friends Collections Committee is to support the Curator of Collections and staff of the Historical Museum at Fort Missoula in their task of acquiring and maintaining Museum collections through assistance with fund raising, grant writing, and networking with the community.

The Curator of Collections will keep the Committee informed of any immediate needs, important acquisitions, and/or donations and long range plans.

On large collections being offered to the Museum, the Curator of Collections will consult the Committee regarding possible acquisition, as large collections frequently require additional monies for processing.

The Curator of Collections will present objects that have a value of more than $2500 for deaccessioning in writing with reason(s) for deaccession to the Committee for their approval, based upon the Collections Policy & Procedure Manual, Section 3. Deaccessioning, 3.1. Upon approval, the Committee will then forward same to the County Museum Trustees for their approval.

July 12, 2000
HISTORICAL MUSEUM
AT FORT MISSOULA
COLLECTIONS POLICY & PROCEDURES
MANUAL

Revised October 7, 2008
By
L. Jane Richards, Assistant Executive Director / Curator of Collections
and
Kiersten Fussell, Collections Intern 2008

Revised March 25, 2009
By
Jason R. Bain, Curator of Collections

Approved on _______________, 2009
Missoula County Board of Trustees for Museums

By________________________________________
Chairman

Approved on _______________, 2009
Historical Museum at Fort Missoula

By________________________________________
Dr. Robert M. Brown, Executive Director
“There is a place for institutions that acquire and use collections of the rare and unique.

But there is also the need for Museums that correctly interpret the ordinary, Common-place objects.”

(from Museum News, AAM)
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1. MISSION STATEMENT, PURPOSE, & GUIDELINES

1.1 Mission Statement
The Historical Museum at Fort Missoula is dedicated to increasing the knowledge and understanding of the history of the county and city of Missoula, the history of Fort Missoula and the military presence in the area, and the history of forest management and the wood products industry in Western Montana. Through an aggressive program of collections, exhibits, educational opportunities, and special events the Friends and the Museum seek to stimulate creative thought and enhance the self-esteem of residents of and visitors to Missoula, providing a sense of place, time, and space for all. To that end, insofar as its resources permit, the Museum collects, preserves, and interprets objects and informational materials related to the exploration, founding, and evolution of the City and County of Missoula, the development and the myriad aspects of the military presence in the area of Fort Missoula, and the history of forest management and the wood products industry in Western Montana. The Museum collects, preserves, and interprets objects from the period of earliest exploration of the Missoula Valley to the present in order to present a coherent and total picture. These objects and informational materials are made available for study and enjoyment of all in a pleasant, secure, safe, and accessible setting. The Museum has in its collections an estimated 30,000 objects, ranging from three-dimensional objects to archival documentary and photographic materials. The Museum’s indoor galleries, with both long-term and changing exhibits, include topics of specific and general interest from the early exploration of the Missoula County area to modern times. These displays, taken together with the outdoor interpretive areas and a complex of original and relocated historical structures, present a picture of the life and material culture of the region. The Museum provides guided tours, special events, workshops, living history demonstrations, and other activities appropriate to these purposes.

1.2 Purpose
This document establishes policies and modes of implementation for the successful maintenance of collections held and managed by the Historical Museum at Fort Missoula. The collections include artifacts, documents/archival materials, photographs, historic structures, and other items maintained by the Historical Museum at Fort Missoula for study, exhibition, and other educational purposes intended to further the mission of the organization. Collections management may be loosely defined as the preservation, documentation, development, care, and use of said items. The Collections Policy & Procedures Manual, therefore, is a resource for proper and standardized utilization of the collections of the Historical Museum at Fort Missoula by Museum staff, volunteers/docents, and the general public.

1.3 Guidelines

1.3.A Ethics
The Historical Museum at Fort Missoula recognizes and accepts its fiduciary
responsibility to provide proper management, preservation, and use of the collections and associated information it holds in trust for the benefit of the public. The staff of the Historical Museum at Fort Missoula are charged with legal, ethical, and professional obligations to maintain high levels of honesty, integrity, and loyalty to the Museum. These standards of conduct are set forth in the Museum’s ‘Standards of Staff Conduct,’ to which all Museum employees are required to adhere. All other standards of professional conduct and practice not enumerated in this document must be adhered to where practicable, in order that Museum staff are operating within both the spirit and letter of the law, as well as those guidelines governing professional museum practice.

1.3.B Accounting For Collections
The Museum’s collections are held and maintained for the purposes of public exhibition, education, and research in furtherance of public service, rather than individual or collective financial gain. Collections are protected, kept unencumbered, cared for, and preserved. The Museum’s collections are also subject to the requirement that proceeds from sales of collections shall be used to acquire other items for the collections, or to meet the needs of conservation, treatment, or preventative care of existing collection items, rather than to meet other Museum expenses. The Museum does not treat its collections as assets for the purposes of reporting on its financial statements.

1.3.C Exceptions
Prudent exceptions to the Museum’s established policies may be permitted in appropriate cases, where said exceptions are in the best interests of the Museum. In all cases, exceptions must be approved according to the process enumerated here. The Director shall report regularly to the assembled Board of Trustees on all exceptions to these policies, which have been duly authorized during the reporting period.

1.3.D Compliance
The Curator of Collections shall report annually, to the Executive Director, on the Museum’s ability to comply with the dictates of the Collections Policy & Procedures Manual. He/she shall also be responsible for ensuring that the highest museum standards are being met, and that these policies are being observed and implemented by the staff and those associated with the Museum. Furthermore, the Curator of Collections shall also be responsible for revising the Collections Policy & Procedures Manual every three years, or with greater or lesser frequency as warranted, and for presenting said revisions to the Executive Director for approval by the Executive Director and the assembled Board of Trustees. The Curator of Collections shall undertake the review process so as to correct any oversights in previous policy, as well as to account for any new circumstances which have arisen since the last review. Prior to the implementation of any revisions, both the Executive Director AND the assembled Board of Trustees must approve revisions to museum policy and procedure.
2. SCOPE OF COLLECTIONS & COLLECTING PLAN

2.1 Introduction
The collections of the Historical Museum at Fort Missoula are concentrated into three primary categories: the history of Missoula County and the City of Missoula, the military history of Fort Missoula, and the history of forest management and the timber products industry in Western Montana. Missoula County history is represented by a broad range of items from the County’s first century, including: furniture, farm tools, goods from the Missoula Mercantile (once the largest department store chain west of St. Paul), a certain amount of Missoula business ephemera, a 1918 fire engine, and a fine textile collection (clothing, quilts, accessories, etc.). The Museum does not collect office equipment, per se. Furthermore, the Museum no longer accesses unidentified photographs and albums. Because of the excellent K. Ross Toole Archives at the University of Montana, we do not actively collect archival materials unless they are specifically related to the military history of Fort Missoula (1877-1947). We see no need to duplicate effort or money. Our three largest document collections are the 640+ WWII propaganda posters, the over 1,200 turn-of-the-century Missoula playbills, and a 117+ piece poster collection by internationally-renowned artist, Monte Dolack (Monte Dolack Collection). The Dolack Collection is important for its environmental and ecological references to the Northwest area. This donation/collection is augmented via an ongoing agreement between the Museum and Mr. Dolack, whereby the Museum receives bi-annual donations of the latest Dolack poster prints. The Museum also developed a small vacation-related collection of maps, brochures, and other ephemera for an exhibit.

The early history of Fort Missoula is represented by some original buildings and architectural fragments remaining of the old Fort, as well as a number of military items (uniforms, insignia, firearms, and written records relating directly to Fort Missoula’s participation in the 1877 Nez Perce War, and the 25th Infantry / 25th Infantry Experimental Bicycle Corps (1880-1899)). The Museum also collects items pertaining to the Alien Detention Center (ADC, 1941-44). The Museum keeps a narrow collecting focus on clothing collections because of the cost of maintenance. Only a few uniforms per gender per war are collected, from the 1870’s through WWII, and generally only those used by Missoulians and/or Montanans.

2.2 Scope of Collections
The permanent collections at the Historical Museum at Fort Missoula may be best apprehended through several broad collection categories, to wit:

2.2.A Forestry & Timber Production
The Museum also maintains a vast collection of objects pertaining to forestry and the forest products industry in Western Montana, such as: chainsaws, hard hats, tools, fire finders, historic structures (Sliderock Lookout), etc. These objects derive from many sources, including: the United States Forest Service (USFS), local lumber companies, railroad firms, and service workers.
2.2.B Fort Missoula Items (History of military occupation of historic Fort Missoula during its use as an active military post)

Items in this collection category are largely stored as flat files, to be found in the Photo Document Room (Main Museum- Building 322), and include: Maps, drawing plans, blueprints, archival documents, photographs, and some small, three-dimensional objects. The Museum also possesses other three-dimensional objects pertaining to the Fort’s military history, including: Military uniforms, insignia and accessories, weapons, and items from the Bill Sharp Collection, as well as those originally belonging to Colonel Kobes. Furthermore, the Museum maintains a large volume of research files relating to the military history of the fort. This research may be broadly grouped, accordingly:

- 25th Infantry research (1888 – 1898);
- Alien Detention Camp (ADC) research (1941 – 1944);
- Branch Disciplinary Barracks (military prison research, 1945 – 1947);
- Civilian Conservation Corps (CCC) research, primarily by Bill Sharp;
- General research re. Fort Missoula (1877-1947), inclusive of 2 original daybooks from the early occupation of the post (i.e. late 19th C);
- WWI research (1914 – 1918), inclusive of Colonel Kobes’ papers;
- WWII research (1939 – 1945).

This collection also contains a set of “land use” drawings completed by archaeological intern, Allen Burns, for the majority of the Museum’s property (32 acres). The base map utilized for this project is a 1944 (‘45?) blueprint, and the land use drawings illustrate as many buildings as were found/known at the time (1984), arranged in overlay by decade. These are stored as flat files in the Photo Document Room (Main Museum- Building 322). A major collecting goal for this particular category will be to complete similar land use/archaeological surveys for the remainder of the Alien Detention Camp (ADC) area. (note: the Fire Station / Guard House was actually built in 1938 (and is now used by the USFS), although the United States Army altered the façade to match the “New Fort,” Spanish-Colonial architectural style of the remaining buildings constructed in the 19’tens).

2.2.C “House” Collections

Sub-collections in this collecting category include domestic items which would comprise the furnishings and sundry items necessary to reproduce a period room of a “house,” accordingly: 1890’s / 1940’s Dining Room, 1900’s Bathroom, 1920’s – 1930’s Kitchen, 1930’s – 1940’s Bedroom, and a 1960’s Living Room. By utilizing different period rooms, all or a portion thereof could be used in an exhibit as a physical base to interpret the “words, thoughts and/or deeds of the story.” Since the Museum’s audiences typically find ‘flatwall’ exhibits insufficient, elements from these collections may be added to both in-house, and incoming, traveling flatwall exhibits to broaden their impact.

2.2.C.1 1890’s / 1940’s Dining Room

This sub-collection possesses the 1890’s china, as well as the china and glassware for the 1940’s timeframe. However, a primary collecting goal for this sub-collection involves the acquisition of the 1890’s silverware (plated is fine and cheaper), with settings for at least 6 people, glassware, and a pair of candlesticks.
2.2.C.2 1900’s Bathroom
The least complete of all such “house” sub-collections, the 1900’s Bathroom possesses only the original 1903 wood toilet from the Missoula Art Museum; a device that would have been found in a home of the same time as well. Primary collecting goals for this sub-collection involve the acquisition of the following: sink, mirror, bathtub, and accessories.

2.2.C.3 1920’s – 1930’s Kitchen
Although largely complete, a primary collecting goal for this sub-collection involves the acquisition of a long white porcelain sink with cloth skirt (plain color or pattern of that period).

2.2.C.4 1930’s – 1940’s Bedroom
As the “house” sub-collection that changes the least in families, this ‘period’ room is mostly done. That said, a primary collecting goal for this sub-collection involves the acquisition of vanity lampshades (either real or reproduction) in the Art Deco style.

2.2.C.5 1960’s Living Room
Among the largest of the “house” sub-collections, this ‘period’ room contains a 3-piece couch / chairs set which may displayed in multiple configurations (ideal for exhibits). Several wall items and knick-knacks round-out this time period, which was collected because the items were available, in good condition, usually free, and small enough to handle (1970’s furniture was often large, heavy, and would require more maintenance / people, etc.). Primary collecting goals for this sub-collection involve the acquisition of a “velvet Elvis” wall hanging, and new foam rubber interior for the couch / chairs set.

The foam needs to be replaced before it ruins the upholstery fabric, in addition to the fact that contact with the material ‘impresses’ the form upon the seats and/or backs leaving a permanent indentation.

2.2.D Huff Collections (Military dress and insignia)
Items in this collection category include approximately 59 framed lithographs (ca. 1905) by artists H.A. Ogden and Thomas Hunter. The lithographs feature individual subjects, although they primarily focus on U.S. Army uniforms and accessories from the mid-19th. through the early 20th. C.

2.2.E Laundry Collection
The Museum maintains a collection comprised of a wide variety of washing machines from the early 1800’s up through the 1940’s. Several types of wash boards and other related accessories round out this collection. Many of the items in this collection will require serious restoration.

2.2.F Medical / Dental
The Museum maintains an extensive medical / dental collection, including such items as: Dr. Evert’s examination table and other items (1920-40s), an older wooden exam table, a
variety of medicine bottles and related containers (stored in a locked cabinet in the Photo Document Room (Main Museum- Building 322)), several physician’s bags and impedimenta, etc. Although the bulk of the dental collection derives from one donor (Dr. Bell), the remaining medical items originate from several area doctors. This is a rather large, and well-represented collection.

2.2.G Missoula Businesses
Sub-collections in this collecting category involve a sampling of artifacts, photographs / archival documents, and business ephemera from specific businesses significant to the history of the City of Missoula, and general professions vital to the life and culture of citizens of Missoula County.

2.2.G.1 Missoula Mercantile (Bon Marche, Macy’s)
This sub-collection contains a host of business ephemera from the era of the Missoula Mercantile, such as: bags, button hooks, boxes, etc. The collection also contains “THE BON MARCHÉ” signage, and small three-dimensional items pertaining to that iteration of the store. The collection further features a range of photographs: early images of the Missoula Mercantile, views of The Bon Marche (ca. 1989), and some current shots of the Macy’s façade. Primary collecting goals for this sub-collection involve the acquisition of three-dimensional Missoula Mercantile and later Bon Marche items from the new Macy’s store manager, Brian Murray.

2.2.G.2 Blacksmith’s Shop
Virtually complete, this sub-collection contains the various implements required for the operation of a blacksmith’s shop, such as: hammer, anvil, tongs, etc.

2.2.G.3 Barber / Beauty Shop
These two sub-collections contain, respectively: a men’s and child’s chairs, a barber pole (glass is cracked and must be handled with great care), and two permanent wave machines (only one would normally have been acquired, however the second came with an important story re. the local fair that needed to be preserved). Primary collecting goals for these sub-collections involve the acquisition of a variety of impedimenta relating to the haircare industry.

2.2.G.4 Cabinetmaker / Carpenter’s Workshop
Although largely complete, this particular sub-collection possesses a number of duplicate items (specifically planes), which will require inventory, identification, and exchange of some surplus items with other museums to better enhance the collection.

2.2.G.5 Telephone Equipment
This sub-collection contains a variety of telephone equipment from various companies operating in the Western Montana region, notably Mountain Bell and Independent Telephone, among others.
2.2.G.6 Railroad
Items in this sub-collection pertain to the operation of railroads in Western Montana (particularly the Northern Pacific Railroad), and the role they played in the history of Missoula City / County. A small to medium size collection, the railroad items are mostly works-on-paper (to be found in the Photo Document Room (Main Museum- Building 322)), and consist of no small volume of railroad timetables.

2.2.H Missoula County High School / Golden ‘M’ Alumni Collection (Missoula County High School, 1905 – 1965, memorabilia)
A collection still in the process of being assembled, items in this category include three-dimensional objects and works-on-paper pertaining to the history of Missoula County High School (1905 – 1965). The Museum already possesses most of the trophies, yearbooks, and school newspapers, although other “school or related” objects round out the collection. On an annual basis, either the Curator of Collections or the Collections Assistant attends the Golden ‘M’ Alumni luncheon / dinner, with a small selection of items from the collections. Furthermore, the Museum completes a short-term exhibit for the Alumni each summer (mid-July through late-September) in the Orientation Gallery, timed to coincide with the 50-year reunion. This annual exhibit is scheduled around displays of the Museum’s Recent Acquisitions, which occur in the same space. This collection is of great importance to the Museum, based upon the impact that Missoula County High School (MCHS) had as a part of the social fabric of Missoula City / County. A primary collecting goal for this category involves acquiring “Bitter Root” yearbooks for those years which the Museum does not already possess.

2.2.I Monte Dolack Posters (Environmental issues of Montana and the Inland Northwest during the latter 20th Century)
The Museum maintains some 117 posters in this collection, initially donated in 2007. Via an agreement with the artist, Mr. Dolack will be donating a print of each new poster to the Museum. Upon notification through the artist’s mailing list, a copy of each new poster is made and placed on file. Approximately two times per year, the Curator of Collections then arranges a meeting with the artist to request our ‘prints’. Separate Deeds of Gift are drawn up for each such accession and a copy of the original Letter of Agreement is attached to the accession file. In addition to documenting the environmental issues prescient to Western Montana and cataloguing the work of a prolific local artist, the Museum also aspires to find a donor to purchase (for the purposes of donation to the Museum’s permanent collections) Mr. Dolack’s primary source materials (i.e. drawings, sketches, journals, etc.).

2.2.J Textile
The Museum maintains a very large textile collection, inclusive of: Quilts, dresses, hats, aprons, lace, gloves, stockings, socks, uniforms (military, Civilian Conservation Corps (CCC), Red Cross, Forest Service (USFS)), curtains, rugs, tablecloths, etc. This collection is extensive and very well represented, although a primary collecting goal for this category will be to improve our collections of “useful” quilts.
2.2.K  Theatre Playbills of Missoula City (Early 20th C Missoula theatre)  
The Museum maintains a large collection of early 20th C Missoula City theatre playbills, ranging from verbal to visual, and numbering approximately 1,200 individual items. A principal portion of this collection was given by a single donor (Huff), although the entire collection boasts multiple donors. A book containing copies of these playbills was assembled for donation to the University of Montana (Mansfield Archives) to complement their similar collections, and the Museum retained an additional copy in the Research Files.

2.2.L  WWII Propaganda Posters (Produced for the civilian home-front)  
The Museum possesses approximately 640+ WWII propaganda posters, produced to inspire and mobilize civilian support during the Second World War. A large selection of duplicate posters have been culled from the permanent collection, and are to be used to meet our collections goals by improving our holdings via exchange. One such goal involves acquiring smaller versions of two rare ‘Freedom’ posters by artist Norman Rockwell. The Museum, in fact, possesses all four posters in the Rockwell ‘Freedom’ set, although two of them are impractically large for the purposes of exhibition.

2.3  Collecting Plan  
The Museum collects the material culture of the people of Missoula County and its environs, and preserves it for the benefit of present and future generations. We look for objects, ordinary and extraordinary, whose stories and meanings are rich and complex, have inherent worth, both reflect and challenge the conventional wisdom, and invite us to look deeper or broader. These objects and their documented contexts illuminate and interpret the larger themes of our history. Our collections form the foundation for research, scholarship, exhibition, public programs, and outreach.

2.3.A  General Statements  

2.3.A.1  The role of objects is to serve as a form of evidence of the past, along with documents and visual records.

2.3.A.2  Objects have many meanings, and, over time, knowledge about the objects and the interpretations of the past will change.

2.3.A.3  In the future, as in the past, the Museum’s collecting will be guided simultaneously by current themes for exhibitions and public programs and by the larger goal of a comprehensive historic collection. Long-range collecting and current themes may not always be in accord (nor need be).

2.3.B  Intellectual Principles for Future Collecting  

2.3.B.1  The Museum’s collections should reflect the breadth, depth, and complexity of the experiences of the people of Missoula County. The Museum actively seeks items to illuminate under-represented stories and groups.
2.3.B.2 Objects will be chosen that have their own stories, and which make clear larger stories (particularly those of a local and regional character).

2.3.B.3 Museum staff will continue to re-examine collections in response to new scholarship and changing interpretations.

2.3.B.4 Museum staff consider it of the utmost importance that we strive to conserve and preserve our objects to the best of our abilities and resources. However, as a smaller museum, our staff and financial resources are limited. As such, careful consideration shall be given towards objects that may stretch these resources. Objects that require extreme conservation, or are in a state of disrepair or neglect, will be weighed very carefully prior to acquisition. Only those objects whose benefits to our mission (such as those of great cultural, artistic, or historical significance) outweigh the burden of their care, shall be considered for acquisition.

2.3.B.5 In acquiring objects, Museum staff will pay as much attention to intellectual matters (relevance, context, significance, provenance) as to procedures (shipping, registration, etc.).

2.3.B.6 Only objects that are deemed to be authentic shall be accessioned into the Museum’s permanent collections. Reproductions, duplicates, or forgeries will be added to the Educational or Exhibit Prop Collections, or will not be accepted at all.

2.3.B.7 In terms of cataloging, the intellectual content will be documented in an accessible manner. Research tools and documentary techniques (oral / video history, documents, photography, etc.) will be employed to provide context for the Museum’s acquisitions.

2.3.B.8 During the acquisition process, the Museum shall endeavor to garner as much supporting documentation as possible for the objects being considered. In order to support our mission, our goal is to learn the provenance, history, anecdotes, biographies, and any other factual (or mythical) information relating to our artifacts. The richer the documentation for an artifact, the more relevant it becomes to our collecting priorities.

2.3.B.9 The Museum will adhere to both the letter and the spirit of accepted ethical standards and principles adopted by museum and other relevant professional organizations.

2.3.B.10 With the approach of the 70th anniversary of WWII (2011) and the fact that the Museum has acquired the Post Headquarters building (Building T1) of that period for the Alien Detention Camp (ADC), the Museum is looking forward to actively seeking any and all items associated with that episode of Missoula County’s history. Fort Missoula, as one of only six Immigration and
Naturalization Service (INS) processing camps ever utilized, is unique in that it retains its fundamental historic integrity. The bulk of its buildings are still standing, whereas the majority of the other camps (both INS and ‘relocation’ camps) were demolished; leaving only a few foundations. The Museum is actively seeking to preserve the experiences of local people who remember that time here. Also to that effect, the Museum owns a collection of over 640 WWII propaganda posters (one of the largest outside of the National Archives), among other items. This is one of 2 time periods principally important to Historic Fort Missoula. Museum staff are applying for National Historic Landmark status to enhance the Fort Missoula National Historic District Designation.

2.3.B.11 Beginning in 2009, Museum staff will seek to develop the Homestead Cabin for the interpretation of living history between 1915 and 1920, focusing on family life.

2.3.C  Thematic Statement
The collections at the Historical Museum at Fort Missoula document the social, cultural, political, religious, military, medical, and technological history (as well as the daily lives) of people in Missoula County and its environs. These collections illuminate broad themes in our history, to wit:

2.3.C.1 Cultural Landscape
The Museum will strive to express the development and expression of cultural histories dealing with the invention of and changes in the forms and media of cultural expression, shaped by region, community, class, gender, religion, ethnicity, race and work. This collecting theme is concerned with how Americans create, learn, and express their cultural literacy, and more specifically their associations with Missoula County.

2.3.C.2 Daily Life
The domestic and business environments and the intersection and tensions between public and private life will be explored by the Museum. The collections examine the changing notions of home, family and women, and how individuals have used the domestic and business spheres to reinforce or challenge accepted ideas of family, gender roles, community, age, religion, and the division of labor.

2.3.C.3 Ethnicity
The collections of the Museum also seek to understand and evaluate the important questions of who are we, where are we from and why, how we got here, where we live and why, and how we interact with one another. Key concepts to this collecting theme are diversity and complexity of the American people, the shaping and reshaping of communities over time, and the changing roles of communities in American life. Also of interest are the manner in which Americans identify themselves as members of various groups, and how the very concept of “peopling America” is informed by issues of race, gender, class, ethnicity national origin, and religious affiliation. Within this vision, the actions
and interactions of Native Americans, and other minority-based histories will be explored in both public and private life by the Museum.

2.3.C.4 Environment
A strong focus of the Museum’s collections explores the relationship between people and the natural environment, our cultural responses to the natural world, how our history and lives have been shaped by the geography, topography, climate, and natural resources of the region, and how we have shaped and reshaped places and spaces (with a particular emphasis upon the role of fire on public lands, since Montana has a high percentage of public lands). Within this collecting theme, the actions and interactions of Native Americans and other minority-based histories with the natural environment will be explored in both public and private spheres.

2.3.D Collecting Priorities
The following priority levels shall be utilized by responsible staff (principally the Curator of Collections) in determining what collections shall be actively sought, acquired, and accessioned for the purposes of research, exhibition, and preservation. At all times they are to be informed and guided by the overall needs of the collections, the availability of similar materials via bequest, exchange or purchase, the significance of potential acquisitions to the mission-driven objectives of the institution, the legal and ethical guidelines of the museum profession, and the general statements, intellectual principles, and collecting themes outlined in Sections 2.3.A – 2.3.C above.

2.3.D.1 As a matter of first priority, the Museum shall endeavor to collect items of virtually all material types pertaining to those collections categories outlined above in Sections 2.2.A – 2.2.L. Within these categories, paramount importance shall be placed upon items related to the Alien Detention Camp (ADC) and other eras of Fort Missoula’s military history.

2.3.D.2 Of secondary priority to the collecting activities of the Museum shall be the acquisition of items pertaining either directly or indirectly to the history of Missoula County, the City of Missoula, and the forest products industry in Western Montana.

2.3.D.3 Of tertiary priority to the collecting activities of the Museum shall be the acquisition of items which serve to emphasize the broader regional or national themes and stories which those items embody.

2.3.E Recommendations For Future Collecting Activities

2.3.E.1 The Museum will endeavor to collect those items which will round-out the collections categories outlined above in Sections 2.2.A – 2.2.L, namely: land use / archaeological surveys for the ADC Camp (specifically) and for the remaining Fort grounds (generally), furnishings and accessories to complete the Museum’s “house” and its associated “period” rooms, items relating to the Missoula Mercantile store, objects and impedimenta to complete the barber and
beauty shops, items obtained via exchange from the duplicates of the cabinetmaker / carpenter’s shop, “Bitter Root” yearbooks encompassing those years of Missoula County High School (MCHS) not already represented in the collections, the latest editions of Monte Dolack poster prints, and two smaller versions of the rare ‘Freedom’ WWII propaganda posters by artist Norman Rockwell, obtained via exchange from the duplicates of the Museum’s extensive WWII poster collection.

2.3.E.2 The Museum will also seek to acquire items that provide a much clearer representation of the minorities that live (and continue to live) in Missoula County, such as Native groups like the Salish and H’mong (non-NAGPRA items), as well as the black community (and associated AME Church) displaced by the loss of the lumber mills and related industries, service in WWII, and relocation to nearby urban centers, i.e. Seattle, in search of employment.

2.3.E.3 Finally, the Museum shall seek to acquire some three-dimensional objects and related documentary material from the Missoula business icon Stoverud’s Jewelry, which closed in December 2008 after 65 years in operation (opened in 1945 on Higgins Avenue).
3. **STAFF CONDUCT STATEMENT**

3.1 **Definition**
The term “staff” is herein defined as referring to all individuals engaged or employed directly by the Museum in conduct undertaken in the furtherance of its mission, as formally approved and adopted by the Board of Trustees. Both volunteer and paid employees are to be considered staff, and all such individuals are thus obligated to conform to the Standards of Staff Conduct laid out herewith.

3.2 **Mandate**
Staff members are expected to understand and to conform all professional activities to the Museum’s mandate, as outlined in the Mission Statement. Any and all programs, procedures, or goals outlined for the department, unit, or Museum as a whole must respect both the letter and spirit of the mission while promoting conduct in full accordance with it.

3.3 **Background / Collections**
This document is informed by the American Association of Museums’ (AAM) Code of Ethics for Museums, the International Council of Museums’ Code of Professional Ethics, as well as the standards and policies of ethics and professional practice adopted and endorsed by any and all organizations by which the Museum is accredited and/or otherwise affiliated.

The acquisition, preservation, care, use, etc. of its varied collections lies at the heart of the mission of the Museum, and represents the foundation upon which its very existence depends. These collections serve as the essential intellectual basis for scholarship, education, and research among the Museum’s public beneficiaries.

Among the Museum’s collections are invaluable examples of City of Missoula and Missoula County history, essential to the study of the social and cultural heritage of local Missoula and the greater North American West. The Museum’s collections represent a diverse range of materials and disciplines, including: rare vintage photographs, archival materials, historic structures, a vast collection of three-dimensional objects, as well as their associated documentation. The scope, depth, and unparalleled quality of these collections make it imperative to ensure that they are properly preserved and made accessible for current and future generations to behold, enjoy, and study.

3.4 **Principles**

3.4.A **Ethics**
The Museum recognizes fully that its continued success depends, in large part, upon maintaining the confidence and trust of all those whom the Museum intends to serve, as well as those whom the Museum comes into contact with in the course of its affairs.
Therefore, the Museum requires of its staff adherence to the highest standards of ethical integrity, legal accountability, and thorough competence in professional training and experience (such expectations of training and experience being appropriate to the level of responsibility and nature of employment within the Museum). In all actions, activities, and relationships the Museum, its Friends of Fort Missoula Board, Board of Trustees, and staff will act with the highest standards of integrity by:

3.4.A.1 Discharging the public functions of the Museum responsibly and according to all relevant law in the applicable jurisdiction(s) in which Museum operations take place, respecting international laws and treaties governing cultural properties and related materials, and by respecting and abiding (whenever practicable) by the provisions of all trust-enabling documents of the Museum.

3.4.A.2 Recognizing and abiding by the ethical standards governing the various professions with which Museum operations bring it into contact.

3.4.A.3 Discharging duties on behalf of the Museum honestly, and in good faith.

3.4.A.4 Making decisions impartially, based upon sound scholarship, while fully adhering to the mission of the Museum and acting (in all regards) in its best interests, and those of its beneficiaries.

3.4.B Care
The Museum accepts fiduciary responsibility to provide overall management, including, but not limited to: storage, preservation, care, handling, exhibition, use of, and access to the collections, facilities, and supporting documentation in activities connected to the Museum, in accordance with the highest precepts of museum professional standards and practices. In order to assure the accomplishment of such goals relating to the care of Museum collections, staff will:

3.4.B.1 Ensure proper care and management of collections by following the established guidelines detailed in the Collections Policy & Procedures Manual and associated documents and directives, and by adhering to those professional practices maintained by organizations through which the Museum is accredited, such as the American Association of Museums (AAM).

3.4.B.2 Designate information integrity as a priority of the Museum. Collections documentation, accession and disposal records, written communication, publication, exhibition, and electronic data and images (among other forms of information) shall be maintained responsibly and updated regularly. This information shall be made accessible to the public and the Museum’s beneficiaries in accordance with all legal standards in the applicable jurisdiction,
and as is deemed appropriate by the Executive Director, or within the discretion of his appointees.

3.4.C Obedience
Staff members must be mindful of, and faithfully adhere to the Museum’s mission at all times, particularly when:

3.4.C.1 Making decisions regarding collections acquisitions / accessions, deaccessions / disposals, loans, exchanges, etc..

3.4.C.2 Making decisions regarding exhibitions, endorsements, sponsorships, marketing, etc..

3.4.C.3 Engaging in professional activities either on behalf of the Museum, or directly related to its operations, and/or intellectual sphere.

3.4.C.4 Disseminating knowledge and information about the Museum’s collections.

3.4.D Accountability
Senior staff members (appointed thusly) are expected to clarify the general policies outlined in this document to those personnel under their purview, via specific written directives of Museum procedure. Lines of personal accountability and responsibility must be thereby fixed and understood by all staff.

3.4.E Purpose
The objectives of this document are to establish a clear and concise set of ethical policies and related directives, as well as to enumerate the standard of conduct applicable to all Museum staff and associated individuals, including (but not limited to):

3.4.E.1 All Museum staff currently in the paid employ of the Historical Museum at Fort Missoula, its trust, subsidiaries, and affiliated institutions or units; &

3.4.E.2 The Museum governorship, namely the Board of Trustees; &

3.4.E.3 All co-op, part-time, volunteer, internship, and other less-than full-time unpaid individuals directly engaged in professional activities on behalf of the Museum.

These principles are intended generally to standardize operations and to promote the highest degree of professional conduct within the Museum, thereby providing Museum collections and holdings with the greatest care possible, in addition to protecting the best interests of our visitors, staff members, and trust beneficiaries.
3.4.F  Interest
While actively engaged in the discharge of their duties, and/or while representing the Museum directly or indirectly, staff owe their primary professional and academic allegiance to the Museum. By entering into a contract of employment with the Museum at any level, staff members are expected to act, at all times, in the best interests of the Museum. In particular, in instances where a conflict-of-interest is likely to occur between the Museum and the staff member, the best interests of the Museum must always take paramount and singular importance. Staff members are expected to make known any personal conflicts-of-interest to supervisory personnel or the Board of Directors (as procedure dictates) as soon as they become aware of the conflict, to recuse themselves from any debate, discussion, or decision-making process related to said conflict-of-interest, and to ameliorate this conflict by whatever means recommended and approved by the Board of Trustees and/or senior supervisory personnel.

3.4.F.1  Personal Collecting
In the interest of the Museum’s mission, any private collections held by staff members or transactions related to the sphere of interpretation of the Museum conducted by staff members shall be made known to the Board of Trustees, or supervisory personnel as procedure dictates. The existence of such collections / transactions must be disclosed when an individual first enters into association with the Museum. An inventory of the collection should be presented to the appropriate official, and be updated in a timely fashion as circumstances change. If objects are acquired after association with the Museum has been undertaken, the individual may be required to allow the Museum to purchase the item at the individual’s cost. An individual may not act to build a larger or more comprehensive collection in areas which are enclosed by the Museum’s sphere of intellectual interpretation and collection. Individuals associated with the Museum may not act in competition with the Museum in acquiring objects, and no staff member (including: unpaid individuals connected in any fashion with the Museum, Board of Trustee members, and relations of any staff personnel) will be permitted to purchase items deaccessioned from the collections of the Museum in any event. Staff members shall endeavor, in their personal collecting activities, to uphold the letter and spirit of all local, national, and international laws, treaties, and agreements. More specifically, staff certify to strictly adhere to all applicable legislation governing issues of particular concern to museums; i.e. intellectual property rights, cultural property, repatriation, unlawfully expropriated archaeological or cultural items, and various regulations governing the disposition / handling of threatened and/or endangered species of flora and fauna, among others.

3.4.F.2  Profit
Staff members are forbidden to profit from the sale of their services or collections while employed by the Museum in cases where their profit, or the public perception thereof, is adjudged to be in conflict with the interests of the Museum. Any staff member, who by virtue of his/her experience, training, and/or affiliation with the Museum receives a request to:
1. Participate in any professional, external body; or

2. Provide any professional service; or

3. Teach, broadcast, or author any work in any media; or

4. Value or authenticate any object in a personal capacity

shall only be permitted to accept said request after first receiving permission from duly appointed Museum personnel. Such permission shall only be granted in a circumstance where the profit from said activity does not, and the performance of such activity would not, create to a disinterested third party the appearance of a conflict-of-interest. Staff members must never use the name or reputation of the Museum for personal profit in any manner. Dealing (buying or selling for a profit) in objects similar to those held by the Museum is prohibited to all staff members, unless duly authorized in writing by the Executive Director of the Museum. In addition, third parties are not permitted to engage in such activities on the staff member’s behalf while the individual is formally affiliated with the Museum.

3.4.F.3 Appraisals / Authentications
Staff members are forbidden to give appraisals to anyone outside the Museum, or for any other than internal registrarial, collections, or loan-related functions (unless otherwise authorized to do so upon authority pre-determined by procedure). If so requested, representatives of the Museum may identify multiple suitable outside appraisers to potential donors, although Museum staff must take due care never to endorse a single appraiser or organization. In such unusual cases as outside appraisals are provided, staff are absolutely forbidden to provide written appraisal values. As concerns the authentication of objects at the request of third parties, Museum staff will strictly confine themselves to their areas of expertise. Furthermore, staff will, under no circumstances, take physical possession of an object from a third party for the purposes of authentication (unless specifically authorized to do so). All subsequent evaluations of collections objects shall be carefully construed as opinions of intellectual interpretation, and all applicable limitations made readily known to the receiving party. As with appraisals, no written estimate of authenticity will be provided. Staff are permitted to share basic information on objects in the collections for the purpose of dissemination of knowledge, in full accordance with the policies and limitations enumerated herein and elsewhere; in pursuance of the mandate of the Museum, while preserving all necessary constraints of confidentiality.

3.4.F.4 Gifts, Favors, Dispensations, etc.
Staff members must never accept gifts or services of more than a negligible value or nature from commercial interests with whom the employee interacts on behalf of the Museum. Staff members should avoid any appearance of being influenced
by commercial contacts or vendors; basing all decisions on behalf of the Museum upon the principles of sound scholarship, and the best interests of the Museum, its public, and beneficiaries.

3.4.F.5 General Deportment
The Museum does not seek to proscribe limits upon the manner in which staff conduct their private affairs on their own time. However, Museum personnel must be aware that, as far as public perception is concerned, any Museum-related activity engaged in by personnel may not be wholly disassociated from a connection with the Museum, and may thus reflect upon its reputation and image. Staff shall, therefore, be expected to bear in mind the following:

1. Staff represent the Museum as an institution both in public and personal affairs, and should behave in a professional manner.

2. Extreme care should be taken to differentiate between actions or statements made as a representative of the Museum and those that represent the individual. Inappropriate conduct reflects upon the Museum and should be avoided at all times. Statements made to the public or press reflect upon the Museum, and should not be colored by personal biases; or, such personal biases should be clearly noted. Similarly, actions taken in the guise of the staff member’s role within the Museum may be interpreted as actions taken by the Museum, and should always be carefully considered.

3. These terms and principles shall be deemed to apply to staff conduct even after said staff have left the employment of the Museum, so long as in the public perception the names and reputation of staff may reasonably be associated with the name and reputation of the Museum.

3.4.F.6 Outside Activities and Affiliations
Activities which may further the mandate of the Museum are highly encouraged, provided they fall within the proscribed standards enumerated within the Standards of Staff Conduct, as well as any and all other relevant governing documents, policies, and procedures relating to Museum operations and staff deportment. Museum staff shall, thus, bear in mind the following guidelines relating to external professional engagements and affiliations:

1. Teaching or lecturing may be greatly beneficial to furthering the Museum mandate, visibility and education goals of the Museum, general level of institutional scholarship, and towards meeting public trust responsibilities of service to beneficiaries and shall, therefore, be encouraged. However, if a staff member’s personal profit threatens to outweigh the benefits of such activities, or if said staff member’s conduct is found (even by appearance) not to be in accordance with standards laid
out herewith and elsewhere, the individual may become subject to examination and potential reprisal.

2. The Museum respects the codes of ethics that apply to members of our staff, in relation to their roles as members of discipline-specific groups; i.e. attorneys, medical doctors, security officers, etc. Museum standards of conduct are neither designed nor intended to impinge on those codes and standards. By contrast, they are designed to be complimentary; in the understanding that the protection and development of the mission of the Museum and the provision of the highest levels of service to Museum beneficiaries (via the cultivation of rigorous standards of conduct) is the primary goal of every member of the staff of the Museum. These principles are intended to unify the separate standards of various professional organizations for the benefit of the Museum specifically, and its public as a whole.

3. In any situation in which staff members are, or appear to be, acting on behalf of the Museum, relationships and correspondence between staff and third parties shall be conducted in a manner of the utmost courtesy (both publicly and privately). Differences of opinion (professional or otherwise) shall never be expressed in a personalized fashion, and no member of the staff shall represent or engage in correspondence with any third party in an official format which is, or may reasonably be, associated with the Museum unless said correspondence is directly related to the Museum’s mission and organizational objectives.

4. Staff members shall neither seek, nor accept, any paid or unpaid outside employment which may reasonably be construed to act to the detriment of the proper discharge of his/her Museum duties and functions, or which contravenes in any way the primary Duty of Loyalty to Museum interests.

5. Staff will take all appropriate measures to ensure that information supplied to donors, affiliated organizations, government entities, and members of the general public is, to the best of his/her professional knowledge and expertise, accurate and relevant. Requests for information will be supplied as time, policy, and resources permit.

6. In the conduct of all affairs, both directly-related to professional / intellectual interests of the Museum and those of a strictly private or external enterprise, staff shall endeavor always to uphold the letter and spirit of all local, national, and international laws, treaties, and agreements. More specifically, staff certify to strictly adhere to all applicable legislation governing issues of particular concern to museums; i.e. intellectual property rights, cultural property, repatriation, unlawfully expropriated archaeological or cultural items, and various regulations
governing the disposition/handling of threatened and/or endangered species of flora and fauna, among others.

3.5. Implementation

These policies are a general outline of conduct expected from members of the staff and associated personnel of the Museum, and should not be viewed as specific procedural instructions defining the day-to-day operations of the Museum.

The Executive Director shall be charged with enforcing the standards outlined within the Museum according to established procedure. At his/her discretion, a Conduct Review may be convened to evaluate any specific breach of Staff Conduct Statement. The Curator of Collections shall be held responsible for the re-evaluation of this document every three years, or with greater or lesser frequency as circumstances dictate.

All staff employees are responsible for adherence to these standards on a daily basis, and for their enforcement by staff members who are subordinate to them in the daily operations of the Museum. Only in certain cases (clarified by procedure and in full accordance with the provisions of this directive) should a Conduct Review be convened to evaluate a specific breach of staff conduct.

3.6 Review

The Standards of Staff Conduct laid out herewith shall be reviewed and amended as necessary by the Curator of Collections or other responsible staff member, at the discretion of the Executive Director, every three years (or with greater or lesser frequency as circumstances dictate). The resulting document shall then be reviewed for approval by the Executive Director and the assembled Board of Trustees, and upon obtaining said approval shall be deemed to have taken governing effect upon Museum operations and subsequent staff conduct.
4. ACQUISITION OF COLLECTIONS & ACCESSIONING

4.1 Definition

*Acquisition*- The act of gaining legal title to a collection item or group of items.

*Accessioning*- The formal process used to acquire legally and to record a collection item or group of items into the Museum’s collections.

4.2 Principles

The acquisition of collections is fundamental to the mission of the Museum to actively collect, preserve, and maintain the history of the City of Missoula, Missoula County, and the forest products and forest management industry in Western Montana. The Museum acquires collection items by a variety of methods, including: gift, bequest, purchase, exchange, and field collecting. The Museum requires responsible, disciplined acquisition of collections via a rigorous adherence to the following principles:

4.2.A The acquisition of collections relevant to the mission and goals of the Museum.

4.2.B The establishment and periodic review of statements which define a scope of collections, as well as collecting goals and priorities.

4.2.C A clear delegation of collecting authority.

4.2.D The use of formalized acquisition evaluation criteria.

4.2.E A strict adherence to professional ethics and all applicable laws and regulations relating to collections acquisition.

4.2.F Collections may be acquired only in accordance with established authority and only when consistent with applicable law and professional ethics. All applicable federal, state, local, and international laws, treaties, regulations, and conventions shall be observed and compliance documented (where appropriate).

4.2.G The Museum observes the highest legal and ethical standards in the acquisition of collections. The Museum shall exercise due diligence in the acquisition of collections, including making reasonable inquiries into the provenance of collection items under consideration for acquisition, in order to determine that the Museum can acquire a valid legal title to the collection item and that the acquisition will conform to all legal and ethical standards as set forth in the Museum’s Staff Conduct Statement.

4.2.H As a general rule, collection items are acquired and accessioned only when there is a good faith intention to retain them in the collections for an indefinite period of time. Exceptions to this rule may be approved in accordance with established procedures.

4.2.I As a general rule, the Museum only acquires unrestricted collections. Exceptions to this rule may be approved in accordance with established procedures.
4.2.J Consultation with the appropriate authority is required before acquisition of any collection that would require substantial resources which would tax the Museum’s allocated collecting budget for the management, and/or preservation of the collection.

4.3 Policy & Procedure

4.3.A Collections Acquisitions

Objects will be accepted or otherwise acquired for the Historical Museum at Fort Missoula’s collections according to the following conditions:

4.3.A.1 Objects must be relevant to and consistent with the purposes and activities of the Historical Museum at Fort Missoula. The purpose of the accessioned collection is to collect and preserve the history of the City of Missoula / Missoula County, the military history of Fort Missoula (1877-1947) and the history of forest management and timber production in Western Montana for the education, recreation and cultural enrichment of visitors and residents of the area.

4.3.A.2 Objects collected for the Museum will be designated for use in either the “accessioned” (i.e. Permanent) or “unaccessioned” (i.e. Education or Exhibit Prop) collections when they are accepted by the Museum. If an object is accepted as “unaccessioned,” it will so state on the Deed of Gift. Objects suitable for the unaccessioned collections shall be multiples of objects in the accessioned collection, reproductions or replicas, or those intended for study, use as exhibit props, those lacking in relevant provenance, or objects in poor and deteriorated condition. Objects designated for the unaccessioned collections will be those assessed at the sole discretion of Museum staff to be of no potential value to the accessioned collection of other nonprofit Museums and/or similar cultural institutions.

4.3.A.3 Authority to evaluate and approve a potential acquisition / accession shall be vested in the Curator of Collections, and/or the Executive Director (as appropriate).

4.3.A.4 Objects in the accessioned collection shall have permanence in the collections so long as they retain their physical integrity, identity, authenticity, and usefulness to the Museum.

4.3.A.5 While the Museum makes no specific warranties to transferors of the future care and preservation of objects donated, it will endeavor to provide the highest precepts of due care, specifically: preventative conservation, storage, handling, and display under conditions that will ensure the object’s availability for future generations, in keeping with professional museum standards.
4.3.A.6 The Museum will grant preference to the acquisition of objects for the accessioned (i.e. Permanent Collection) over those of the unaccessioned collections.

4.3.A.7 An object that will, in all probability, result in major future expense on the part of the Museum should be carefully considered before it is accepted.

4.3.B Provenance & Legal Title
Prior to accessioning a collections object, the transferor must provide reasonable proof that he/she can and will convey good, clear legal title.

4.3.B.1 Museum staff should have reasonable assurance that an object has not been exported from its country of origin in violation of that country’s law, the ethical guidelines defined by the United Nations (UNESCO) Treaty of 1972, or in violation of federal or state antiquity laws.

4.3.B.2 The Museum shall not acquire animals or animal parts, feathers or other bird parts, nests, or eggs in violation of international agreements, federal, or state law.

4.3.B.3 Title to all objects acquired for the collections should be obtained free and clear, that is to say without restrictions or limitations. However, conditions (where accepted by the responsible Museum staff member) should be stated clearly in an instrument of conveyance, made part of the accession records for the item(s), and strictly observed by the Museum in all activities involving the accessioned collections item(s). All restrictions or limitations must be unanimously approved by the assembled Board of Trustees and the reason(s) for the acceptance of said restrictions clearly stated in writing.

4.3.B.4 If the use of the object is restricted or encumbered by (1. An intellectual property (copyright, patent, trademark, or trade name, or (2. By its nature (e.g., obscene, defamatory, potentially an invasion of privacy, physically hazardous etc.), acceptance of the object must be in writing and must be approved by the assembled Board of Trustees. Documentation to this effect will state in writing why said object is accepted and will be made part of the object’s accession file. A legal instrument of conveyance, setting forth an adequate description of the object(s) and precise conditions of transfer, should accompany all gifts and purchases and should be kept on file at the Museum. In the case of sales and conditional gifts, this document should be signed by the seller or donor and by an authorized Museum representative. In the case of unconditional gifts, the document need be signed only by the donor.

4.3.C Tax Consequences of Donations
Donations to the Museum are tax deductible (to the extent provided by law) as charitable contributions for the value of the property as determined by an appraisal, receipt, or other
valid documentation, minus the value of any goods or services received by the donor in exchange for the gift.

4.3.C.1 The responsibility of providing an appraisal lies with the donor. Staff members shall not appraise donations, as this represents a clear conflict-of-interest on the part of the Museum, while at the same time interposing the Museum between the donor and the mandates of the Internal Revenue Service (IRS).

4.3.C.2 No acquisition shall be appraised by a trustee, staff member, or any other person closely associated with the Museum, although under limited circumstances staff may render impartial assistance to donors seeking independent, qualified appraisers. (See U.S. Tax Reform Act of 1984 and Internal Revenue Service regulations relating to the Act for further clarification).

4.3.C.3 For information regarding tax deductions, donors should consult Internal Revenue Service (IRS) Publication 561, “Valuation of Donated Property,” and Publication 526, “Income Tax Deduction for Contributions,” or contact their own tax specialist.

4.3.D Accessions Documentation
A separate file arranged by accession number in chronological order shall be maintained under supervision of the Curator of Collections. These accession files shall contain the muniment, transfer documentation, or instrument of conveyance of each acquisition from each source. The muniment shall be of a form that proves the Museum’s unqualified, good, clear legal to accessioned items. No accession file or its contents (whether active or “deaccessioned”) shall ever be destroyed, purged or otherwise altered in any manner. All other facts pertaining to the circumstances of acquisition, care, use, deaccession, and disposal should be adequately documented in the Museum’s collections records.

4.3.D.1 Acquisitions to the Permanent Collection shall be promptly accessioned upon receipt and acceptance under a system approved by the Executive Director and overseen by the Curator of Collections.

4.3.D.2 Acquisitions designated for the Permanent Collection shall be promptly registered in the handwritten Accession Ledger, maintained by the Curator of Collections. As each donation is recorded a copy of the “Accession Record” (derived from the PastPerfect collections management system) shall be printed and placed in the accession file. Every 3-5 years copies of the Accessions Records and the handwritten Accession Ledger sheets shall be permanently bound and placed in the Accession Record Book. All accession books are to be kept in the fire proof cabinet(s) with the accession records.

4.3.D.3 A unique number shall be assigned to each donation and to each object within each donation to the Museum’s Permanent Collection. Numbers shall be
used for collections recordkeeping. All objects shall be marked LEGIBLY with their unique numbers in a permanent but reversible medium. All records pertaining to a particular object shall be marked with that object’s unique accession, or catalogue number.

4.3.D.4 The numbering system in use at the Museum will be a variation of the tripartite system commonly used in American museums. The first part of each collection item number shall consist of the four numbers corresponding to the year in which the donation was made. The second part of the number will be separated from the first by a period, and shall be chronologically assigned to represent the order in which different accessioned collections are donated within a given calendar year (e.g. the thirty-second collection donated in 1989 would thusly be assigned the number 1989.32). The third segment of the three-part number shall be separated by a period from the first two parts, and shall be assigned to create a unique number identity for each object within the accessioned collection. “Object numbers” will thusly represent a numerical ranking of objects within the donation (e.g. the fifth object in accessioned collection 1989.32 would bear the identifying object number 1989.32.5). Lower case letters shall be used in conjunction with an accession number to reflect the existence of related or detachable parts, or a duplicate (e.g. two duplicate photographs of the same subject would be numbered 1989.32.5a & 1989.32.5b). Collectively, this number shall be known as the “accession number” (i.e. the catalogue number) and will be used as the basis for the maintenance of collections records.

4.3.D.5 Once the decision to accession has been made, a copy of the Deed of Gift shall be drafted and sent to the donor, along with a letter of thanks, for the donor to sign and return. The accession number for the donation shall appear within the letter of thanks as a reference number.

4.3.D.6 A Deed of Gift Form MUST be executed for ALL accessioned collections items. This form must be signed and dated by the donor and countersigned / dated by the Curator of Collections (or the Executive Director, where appropriate) in order to effect a legal transfer of the donated items. The donation should be listed in sufficient detail to accurately identify each individual item (and its subsequent or related parts) in a given accession (e.g. the correct listing of a donation of household items on a Deed of Gift Form would include, “lamp, teapot, dinner plate, etc.” rather than the more generic and less descriptive “household goods.”) The fully executed Deed of Gift then becomes part of the permanent accession file, and represents the Museum’s legal title to the donated object(s).

4.3.D.7 Once the Deed of Gift is fully executed, a photocopy of the Accession Record shall be placed in the accession file, illustrating the date of accession, name of donor (unless anonymous), and a complete, detailed listing of the donation, including each object’s assigned accession number.
4.3.D.8 The accession number shall be placed upon the Deed of Gift Form, as the accession file folder (in the upper, left-hand corner of the folder tab), as well as upon the object itself (see Sections 4.3.D.11 – 4.3.D.14 below). The folder to be utilized for the purposes of housing accessions information shall be a full-cut, acid-free, legal-sized folder measuring 8 ½” x 11.” The accessioned object shall be numbered thereon (as appropriate), and also tagged with an acid-free tag which includes the accession number, a brief description of the object (eg. “vase,” “chair,” etc.), a location code, and a date whenever possible (e.g. ca. 1972).

4.3.D.9 ALL accessioned collections objects are to be entered into the PastPerfect collections management system. Staff members should bear in mind that the section “Contacts” should be filled out with the donor’s name, address, and information first. The accession and individual catalogue records shall then be entered per PastPerfect instructions (see the PastPerfect manuals in the Registrar’s Office for accessions entry procedure).

4.3.D.10 Each accessioned object shall then be cleaned and repaired at this time (at the discretion of the Curator of Collections), housed in the appropriate acid-free materials, numbered, tagged, and placed in the appropriate storage location. Where deemed necessary by collections staff, a brief condition report may be completed and added to the accession file.

4.3.D.11 When numbering objects with a dark background (nonarchival), a white acrylic paint, rapidiograph ink or appropriate archival pen, and reversible Soluvar B67 lacquer (in that order) shall be utilized to number an accessioned collections object. For an object with a light background, Soluvar B67 lacquer shall be employed, followed the accession number in archival ink, and finished with lacquer again.

4.3.D.12 Books are to be numbered with a No. 2 lead pencil on the back, inside cover, in the lower, right-hand corner, or as near thereto. If unable to number in that area, the next position chosen should be the back, inside cover, upper right-hand corner, followed by the lower left-hand corner of the opposite page, and finally the upper left-hand corner of the opposite page if all previous positions on the back, inside cover are unavailable. If none of these options are possible, the book should be numbered on the front, inside cover, upper left-hand corner, followed by the lower left-hand corner if unavailable, etc.

4.3.D.13 All paper, photographs, prints and other “archival” materials are to be numbered with a No. 2 lead pencil, reasonably sharp but pressed with care. Standard English number symbols shall be utilized (e.g. the number “7” should be shown as “7” and NOT crossed).

4.3.D.14 When numbering photographic materials, the object number should appear on the print AND the negative, either on the print itself or written upon the archival sleeve of the negative. Photographic negatives will be prefaced by an

4.3.E Photography

4.3.E.1 Promptly upon being accessioned into the Permanent Collections, all accessioned collections objects shall be digitally photographed. Said photographic image shall feature prominently the following information: Accession number, measurement scale (CM), Kodak color scale, and Kodak grey scale. This photographic image shall then be attached to the catalogue record in PastPerfect, thereby becoming part of the permanent collections record. This same policy shall apply to loaned materials and exhibits as well.

4.3.E.2 The use of any type of camera within the Museum is restricted. Publication of photographs of Museum objects or exhibits is expressly prohibited, without the prior consent of the Executive Director or the Curator of Collections.

4.3.E.3 The policy regarding the use of cameras and video cameras in the Main Museum (Building 322), and outbuildings is as follows: There are numerous reasons for restricting the use of a camera or video camera in a Museum environment. Accumulated exposure to light sources may cause damage to collections objects over a period of time due to the transmission / absorption of light energy by exhibited materials. Furthermore, security of the collections and the Museum building may be compromised, as photographing or filming the interior structure of the Museum building and exhibitry may illustrate the means to nullify or bypass the building’s security arrangements. Additionally, loaned items must be protected from unlawful and/or unethical use. To photograph or film a loaned item and subsequently reproduce it for personal sale or gain without permission of the lender could leave the Museum liable for damages to the owner of the loaned item.

Therefore, photographing or filming by ANY PERSON within any Museum structure, exhibit, or display is expressly prohibited without the prior consent of the Executive Director or Curator of Collections. Such permission will be given by the Executive Director or the Curator of Collections IN PERSON to the reception desk volunteer / docent, or IN WRITING to the requestor via the form, “Form For Use Of Camera Or Video Camera In A Museum Building Or Historic Building”. Absolutely NO FLASH PHOTOGRAPHY is allowed within any Museum structure, exhibit, or display at any time. Exceptions may appertain in the case of a private researcher or a student from a school or university who requests permission to photograph or film an object(s) or exhibit(s) within the Museum. Said requestors will need to obtain the form, “Form For Use Of Camera Or Video Camera In A Museum Building Or Historic Building” from the Museum office. The original, signed form shall be maintained on file by the Curator of Collections and a photocopy shall be given to the party requesting permission. However, even with proper identification, the Museum reserves the
right to refuse any and all requests for photography of the Museum’s collections, structures, exhibits, and/or grounds.

4.3.G Policies Governing Public Disclosure

4.3.G.1 A copy of the Collections Policy & Procedures Manual adopted and adhered to by the Museum with respect to the acquisition and disposition of collection materials shall be made available to donors and other responsible persons upon request.

4.3.G.2 In response to reasonable inquiries, the Museum shall endeavor (where practicable) to make available pertinent information regarding the collection. However, the release of collections information shall be at the sole discretion of the Executive Director and/or the Curator of Collections.

4.4 Implementation

4.4.A All Museum staff, volunteers / docents, board members, and associated personnel shall strictly adhere to all applicable guidelines and procedures for acquisition and accessioning enumerated in the Collections Policy & Procedures Manual, as approved and accepted by the Executive Director and the assembled Board of Trustees.

4.4.B The Director shall report annually to the Board of Trustees on accessions to the Permanent Collections that have occurred during the reporting period.
5. DEACCESSIONING OF COLLECTIONS & DISPOSAL

5.1 Definition

Deaccessioning - The process used to formally approve and record the removal of a collection item or group of items from the Museum’s collections.

Disposal - The act of physically removing a collection item or group of items from the Museum’s collections.

5.2 Principles

The deaccessioning and disposal of collections is fundamental to the work of the Museum, in that it permits for a considered and constant re-evaluation of the collecting efforts of the Museum in light of extant resources, changing audience demographics, and shifting mission-driven objectives. The Museum disposes of collection items by a variety of methods, including: donation, transfer, exchange, sale, repatriation, and destruction. The Museum requires responsible, disciplined deaccessioning of collections via a rigorous adherence to the following principles:

5.2.A As a general rule, collections are acquired for the collections of the Museum only when there is a good faith intention to retain the material for an indefinite time period. Collections are retained as long as they continue to serve the goals and mission-driven objectives of the Museum and can be properly maintained and used;

5.2.B Deaccessioning and disposal are a legitimate part of responsible collections management practice. Prudent collections management includes judicious consideration of appropriate deaccessioning and disposal. The periodic review, evaluation, deaccessioning, and disposal of existing collections are intended to refine and improve the quality and relevance of the collections, with respect to the Museum’s mission and purposes. Deaccession and disposal procedures are designed to ensure thoughtful, well-documented consideration of each proposed collection item in the context of the long-term interests of the Museum, the general public, and the collection object.

5.2.C Deaccessioning and disposal occur for a variety of reasons, such as: deterioration of collection items beyond usefulness, duplication or redundancy of collection material, insufficient relationship of collection items to the mission and goals of the Museum (such that they are judged to be better placed elsewhere), repatriation, and selection for consumptive research or educational use.

5.2.D The Museum disposes of collections by a variety of methods, such as: donation, transfer, exchange, sale, repatriation, and destruction.

5.2.E Collections may be deaccessioned and disposed of only in accordance with established authority and only when consistent with applicable law and professional
ethics. All applicable federal, state, local, and international laws, treaties, and regulations and any other applicable restrictions will be observed and documented during the Museum during the deaccessioning and disposal process.

5.2.F Proceeds realized from the disposal of collection items must be designated either for further collections acquisitions, or for the preventative conservation, due care, and maintenance of existing collections.

5.3 Policy & Procedure

5.3.A Collections Deaccessions
No accessioned object or collection shall be removed from the Museum’s register and physically disposed of except by strict conformity to the following rules:

5.3.A.1 The authority to propose a potential deaccession / disposition shall be vested in the Curator of Collections and/or the Executive Director (as appropriate). As the staff member most directly responsible for collections management, the process shall be initiated by the Curator of Collections. When the Curator of Collections and Executive Director deem it advisable to deaccession any object or collection owned by or deposited with the Museum and the proposed deaccession is duplicative, superfluous, deteriorated, incompatible with the mission, or otherwise deemed to be disposable, the Curator of Collections shall prepare for the Executive Director and the Board of Trustees a deaccession recommendation. Deaccessions having an estimated value of less than two thousand five-hundred dollars ($2,500) may be appropriately disposed of by the Executive Director in an approved manner. Deaccessions having an estimated value of greater than two thousand five-hundred dollars ($2,500) must be approved by the Museum’s Board of Trustees. Upon deaccession, the deaccessioned object or collection may be disposed of as provided by state law. Objects with a value of less than $2,500 may be disposed of in any approved manner. Objects with a value of more than $2,500 must be appraised and offered to the public at auction. Disposal of collections objects through sale shall be conducted solely for the advancement of the Museum’s mission, and use of proceeds from the sale of collection materials is restricted to the acquisition and/or direct care of collections.

5.3.A.2 No donated object shall be deaccessioned for any reason within two (2) years of the date of its acquisition (see U.S. Tax Reform Act of 1984 and IRS regulations for further clarification).

5.3.A.3 While a Deed of Gift ostensibly provides the Museum good, clear legal title, as a matter of courtesy to the donor or his/her heirs the Museum will endeavor to notify the donor or his/her heirs of the intent to deaccession and will explain the reasons thereof (where practicable). Further to this effect, the
Museum will exercise a reasonable effort to determine the last known address of the donor.

5.3.A.4 An acquisition fund shall be created to which all net proceeds resulting from deaccessioning of collections objects are deposited and which (with Board approval) withdrawals are made only for collections acquisitions and/or direct care of the existing collections. This fund shall be known as the Friends Acquisition Fund Collection.

5.3.B Deaccessions Documentation

5.3.B.1 Once it has been determined that a deaccession proposal shall be prepared, the Curator of Collections shall draw up the following forms for submission to the Executive Director (and eventually the Board of Trustees) for signature and approval: (1. A Deaccession Memo shall list a brief description of the items proposed for deaccession, the accession number, the reason for deaccession, the party to whom transfer is to take place, and an estimation of the value of said objects; (2. A Letter of Transfer which shall convey the reasons for the deaccession and shall specify transfer to the appropriate party or institution. Three copies of each form shall be drawn up, with one each to be placed in the appropriate accession file, the transfer book, and in the files of the Executive Director. The Curator of Collections shall sign each of the Letters of Transfer, as well as the Deaccession Memos. The Executive Director shall initial each of the Memos, and the transfer shall be deemed complete when the transferee party shall countersign each of the Letters of Transfer.

5.3.B.2 A complete record of ALL deaccessions shall be maintained by the Executive Director and the Curator of Collections, and retained within the appropriate accession file. Such “deaccessioned” files are kept with the accession files, and NONE of the accession files (whether active or deaccessioned) are EVER DESTROYED, PURGED, OR OTHERWISE ALTERED in any manner. If the total donation has been deaccessioned, the word “DEACCESSIONED” is printed in red on the accession file folder, in the upper right-hand corner of the file tab. The accession number, by contrast, appears in black pencil on the upper, left-hand side of the full tab of the acid-free accession file folder.

5.3.B.3 When an object is deaccessioned, it shall be so noted in all relevant fields of the PastPerfect collections management database, and a copy of the “deaccession” record shall be placed in the accession file. A copy of this record shall also be placed in the Transfer Book, maintained in the fireproof collections record cabinets which also house the accessions files.

5.3.B.4 The listings in the Accession Ledger and the bound Accession Record Book pertaining to the deaccessioned object(s) shall be lined through IN RED PENCIL, with the deaccession date and the initials of the Curator of Collections (or Executive Director, as appropriate) clearly visible therein.
5.3.C Disposition of Deaccessioned Collections Objects
In considering various alternatives for the disposition of deaccessioned collections objects, the Museum shall take into consideration that:

5.3.C.1 The manner of disposition is in the best interests of the public the Museum serves, the public trust embodied in owning and maintaining collections, and the scholarly or cultural communities at whose behest the Museum conducts its operations.

5.3.C.2 Preference shall be given to retaining state or national materials that are part of the historical, cultural, or scientific heritage of the State of Montana, United States of America, respectively.

5.3.C.3 Consideration shall also be given to placing the objects (via gift, exchange, or sale) in another tax-exempt public institution where they may serve the purpose(s) for which they were initially acquired by the Museum. If the deaccessioned collections objects are offered for sale elsewhere, preference should be given to sale at advertised public auction or to the public marketplace in a manner that will best protect the interests, objectives, and legal status of the Museum.

5.3.C.4 Deaccessioned collections objects may NEVER be given away or sold privately to the anyone associated with the work of the Museum (i.e. Museum employees, Board of Trustee members, Friends Board members, employees of the County of Missoula, volunteers, docents, interns, or any other party representing or otherwise associated with any of the aforementioned groups).

5.3.C.5 Retail outlets connected with the Museum, or its allied organizations, shall not be used in any way for the purpose of disposing of collections objects.

5.3.D Restrictions On Deaccessioning & Disposition
Before deaccessioning or disposing of any objects from the collections, a reasonable effort should be made (on the part of responsible staff) to ascertain that the Museum is free to do so. Where restrictions as to use or disposition of the objects under question are found to apply, the Museum should act accordingly:

5.3.D.1 Mandatory restrictions should be observed strictly unless deviation from their terms is deemed ‘impossible, impractical, or unethical’ and duly authorized by a court of competent jurisdiction.

5.3.D.2 Collections objects to which precatory restrictions apply should not be disposed of until reasonable efforts are made to comply with the restricting conditions. If practical and reasonable to do so (in consideration of the value of the collections objects in question) the Museum should notify the donor if it
intends to dispose of such objects within five (5) years of receiving the gift, or within the donor’s lifetime, whichever is less.

5.3.D.3 If any question exists as to the intent or force of gift restrictions governing a collections object proposed for deaccession and disposal, Museum staff should seek the advise of competent legal counsel.

5.3.E Disposition of Loaned Collections Objects

5.3.E.1 Objects offered to the Museum but judged unacceptable for the Permanent, Education, or Exhibit Prop Collections shall be returned to the donor in the manner enumerated and otherwise specified in the loan agreement. Objects rejected by the Museum and not retrieved by the donor within six (6) months after notification by the Museum shall be eligible for disposition by Museum staff, with a record of said disposition to be kept on file in the Transfer Book.

5.3.E.2 Loaned objects that cannot be returned to the Lender after the Museum has made a good faith effort (exercising due diligence) to locate said Lender and to return said loan(s), shall be either be accessioned into the collections or disposed of as abandoned property at the discretion of the Curator of Collections and the Executive Director, pending the approval of the Board of Trustees and legal counsel. The Museum shall dispose of the loaned items via accepted methods, and according to any “Conditions” on the indicated on the loan forms.

5.4 Implementation

5.4.A All Museum staff, volunteers / docents, board members, and associated personnel shall strictly adhere to all applicable guidelines and procedures for deaccessioning and disposal enumerated in the Collections Policy & Procedures Manual, as approved and accepted by the Executive Director and the assembled Board of Trustees.

5.4.B The Director shall report annually to the Board of Trustees on deaccessions and disposals that have occurred during the reporting period.
6. **LOANS**

6.1 **Definition**

*Loan or Bailment* - The temporary transfer of possession of a collection item(s) for an agreed-upon purpose, and on the condition that the collection item(s) shall be returned at a specified time once the purpose of the loan has been fulfilled. Loans result only in a temporary transfer of responsibility for an object, and not in a change of ownership of said object.

6.2 **Principles**

The lending and receipt on loan of collections objects is fundamental to the work of the Museum, in that it promotes the dispersal of educational information regarding the holdings of the Museum and like institutions to broader audiences than would otherwise be possible. However, due to the high standard of Due Care expected for collections the Museum requires responsible, disciplined lending and borrowing of collections via a rigorous adherence to the following principles:

6.2.A A fundamental aspect of the Museum’s mission is to widely disperse information and knowledge through museum education. The exchange of collections with other institutions and entities for public exhibition, research, and education seeks to uphold this aspect of our institutional objectives.

6.2.B Temporary transfers of physical custody between Museum departments are essential to the Museum’s programming, as are loans to and from other educational organizations.

6.2.C The Museum strictly adheres to the “Guidelines for Exhibiting Borrowed Objects,” issued by the American Association of Museums (AAM).

6.2.D A collection item may be lent or borrowed only in accordance with established authority and only when consistent with applicable law and professional ethics.

6.2.E Museum collections will only be lent for the purposes of public exhibition, research, and other educational endeavors. Museum collections may only be lent for limited, clearly-defined commercial purposes, and never for private financial gain.

6.2.F All loans entered into by the Museum are to run for a specified time period, with an option for renewal. Indefinite or permanent loans are not encouraged.

6.2.G Collections both loaned by the Museum and on loan to the Museum will be Insured, as specified in an authorized loan agreement.

6.2.H All loans to or from the Museum must adhere to all applicable federal, state, local, and international laws, treaties, and regulations.
6.2.I The Museum reserves the option to charge loan fees, in addition to actual expenses incurred in the conduct of an outgoing loan;

6.2.J The Museum retains financial responsibility for the continued oversight of its collections, regardless of length and type of loan.

6.3 Policy & Procedure

6.3.A Outgoing Loans
Outgoing loans shall be made to similar educational and collecting institutions so that collections objects enjoy appropriate environmental protection, adequate safety precautions, and sufficient access for research / exhibition purposes and the enjoyment of the general public. Collections objects are NEVER to be loaned for the private gain of the borrower.

6.3.A.1 The authority for approving outgoing loans from the collections shall be vested in the Curator of Collections, or in the Executive Director (as appropriate).

6.3.A.2 The Curator of Collections shall also be charged with the responsibility for determining if the condition of an object permits it to be loaned, if loan restrictions should be included in the agreement, and/or if the borrower is to provide a General Facilities Report.

6.3.A.3 Outgoing loans made by the Museum are made to other museums or similar cultural institutions, rather than to individuals, except in rare cases where the benefit accrues primarily to the Museum and to the general public rather than to the borrower.

6.3.A.4 Outgoing loans will be generated for a period of one year or less, with the understanding that loans may be renewed and language to that effect in the loan agreement.

6.3.A.5 The Museum reserves the right to specify the type of carrier and method of shipment to be utilized during the conduct of the loan (typically U-Haul or personal courier, due to the lack of fine arts shipment in the State of Montana).

6.3.B Outgoing Loans Documentation
It shall be the responsibility of the Curator of Collections to monitor any outgoing loans from the Museum’s collections, and to maintain any and all appropriate loan files.

6.3.B.1 At the discretion of the Curator of Collections, various records may be required of the borrower, including (but not limited to): Certificates of insurance, general facilities reports, condition reports, etc. If the borrower chooses not to comply or is unable to comply, the Curator of Collections shall be vested with the
authority to remove the object from the borrower’s custody, and subsequently to terminate the outgoing loan agreement.

6.3.B.2 Although both institutions may choose to execute their own Outgoing / Incoming Loan Agreement, respectively, the terms and conditions of the lender’s forms shall always control.

6.3.B.3 Unless specifically exempted in writing by the Executive Director, objects loaned from the collections for the purposes of exhibition or publication in any format must be credited to the Museum. It shall be the responsibility of the Curator of Collections (or the Executive Director, as appropriate) to provide the credit line in the relevant loan paperwork.

6.3.B.4 In the event that a negative of a photograph from the collection does not exist and is to be used in an exhibit or loaned, a 4” x 5” negative is to made at that time. This practice reduces the wear and tear on the collections. The negative shall bear the “N-“ number (“N-[accession number]” of the object in the upper right-hand corner.

6.3.B.5 Once the Curator of Collections has determined to arrange an Outgoing Loan, he/she shall record the loan in the handwritten Loan Book (located in the loan files in the office of the Curator of Collections). In the Loan Book entry, the Curator of Collections will specify the following information: Loan number, borrower, and purpose of loan.

6.3.B.6 With the Loan Book entry complete, the Curator of Collections will then draft the Outgoing Loan Agreement, replete with full descriptions of the loaned items (including accession numbers), as well as photocopies / photographs of said items. The terms of this agreement shall, in all cases, control the conduct of the loan. The Curator of Collections will specify such matters as insurance, the necessity of condition reports, the duration and purpose of the loan, terms of shipment, and the wording of the credit line in this agreement. A copy will then be sent to the prospective borrower for review and signature. When the Curator of Collections receives a signed copy of the Outgoing Loan Form he/she shall countersign the form, and place it in the active loan files (maintained in the loan files in the office of the Curator of Collections). A photocopy of the loan agreement (and all related materials) should also be made, and placed in the accessions files of the relevant collections objects. Finally, the Curator of Collections (or his/her staff designee) shall photograph the outgoing loan materials, and record the loan in the PastPerfect collections management system.

6.3.B.7 Upon return of loaned collections materials and receipt of the signed Outgoing Loan Agreement, the Curator of Collections shall be charged with the responsibility of evaluating the condition of the loaned materials, reviewing the terms of the loan agreement, and (assuming the results meet with approval) closing out the active loan. The Curator of Collections thusly shall draw a line
through the Outgoing Loan Agreement and the Loan Book entry in red pen/pencil to indicate the closing of the loan. Said loan paperwork may then be filed in the inactive loan files (maintained in the loan files in the office of the Curator of Collections), and the collections objects returned to appropriate storage. The loan status should also be updated in the PastPerfect collections management system at this time. The Curator of Collections shall be charged with completing this process for the handling of outgoing loans, in addition to the completion of any paperwork required of Museum staff by the borrower.

6.3.C Incoming Loans
At the Discretion of the Curator of Collections, collections objects may be borrowed for the purposes of exhibition, study, and/or comparison.

6.3.C.1 The authority for approving incoming loans of collections objects shall be vested in the Curator of Collections, or in the Executive Director (as appropriate).

6.3.C.2 If restrictions are placed upon a proposed loan by the lender, acceptance of said restrictions shall be at the discretion of the Curator of Collections.

6.3.C.3 No object(s) will be accepted by any staff member, trustee, volunteer / docent, or any other individual associated with the Museum if the object(s) are known to have questionable provenance.

6.3.C.4 At the discretion of the Curator of Collections, an object may be accepted for incoming loan that is of a fragile nature. The Curator of Collections will ensure to her/his best ability that the lender will hold the Museum harmless for damage to said items (except in the case of gross negligence), although it is preferred that such objects are not accepted for loan.

6.3.D Incoming Loans Documentation
The Curator of Collections shall maintain all records deemed necessary and prudent for the documentation of incoming collections loans, and will be responsible for monitoring said loaned objects.

6.3.D.1 The Curator of Collections shall be charged with the responsibility of providing various records which may be required by the lender, including (but not limited to): Certificates of insurance, general facilities reports, condition reports, etc.

6.3.D.2 Although both institutions may choose to execute their own Incoming / Outgoing Loan Agreement, respectively, the terms and conditions of the lender’s forms shall always control.

6.3.D.3 Unless specifically exempted in writing by the responsible staff member of the lending institution, objects borrowed from the collections of another
institutions for the purposes of exhibition or publication in any format must be credited to the lender. It shall be the responsibility of the Curator of Collections to adhere to the credit line specified in the relevant loan paperwork.

6.3.D.4 Once the Curator of Collections has determined to arrange an Incoming Loan, he/she shall record the loan in the handwritten Loan Book (located in the loan files in the office of the Curator of Collections). In the Loan Book entry, the Curator of Collections will specify the following information: Loan number, lender, and purpose of loan.

6.3.D.5 With the Loan Book entry complete, the Curator of Collections will then draft the Incoming Loan Agreement, replete with full descriptions of the borrowed items, as well as photocopies / photographs of said items. The terms of the lender’s Outgoing Loan Agreement shall, however, control the conduct of the loan in all cases. The Curator of Collections will clarify such matters as insurance, the necessity of condition reports, the duration and purpose of the loan, terms of shipment, and the wording of the credit line in this agreement (as stipulated by the lender). A copy will then be sent to the prospective lender for review and signature. When the Curator of Collections receives a signed copy of the Incoming Loan Form he/she shall countersign the form, and place it in the active loan files (maintained in the loan files in the office of the Curator of Collections). A photocopy of the loan agreement (and all related materials) should also be made, and placed in the exhibition files where appropriate. Upon receipt of the loaned materials, the Curator of Collections (or his/her staff designee) shall photograph the received materials and record the loan in the PastPerfect collections management system. He/she and his/her staff shall then label the borrowed items with green tags (signifying an incoming loan), and shall attach copies of the Incoming Loan Agreement to all said loan materials while not in use.

6.3.D.6 Upon completion of the specified loan period / purpose, the Curator of Collections shall be charged with the responsibility of evaluating the condition of the borrowed materials, reviewing the terms of the loan agreement, and returning the materials to the lender (or shipping them on to the next venue) according to the terms of the loan agreement. The Curator of Collections shall then be charged with closing out the active loan. He/she shall thusly draw a line through the Incoming Loan Agreement and the Loan Book entry in red pen/pencil to indicate the closing of the loan. Said loan paperwork may then be filed in the inactive loan files (maintained in the loan files in the office of the Curator of Collections), and the loan status updated in the PastPerfect collections management database. The Curator of Collections shall be charged with completing this process for the handling of incoming loans, in addition to the completion of any paperwork required of Museum staff by the lender.
6.3.E  Custodial Loans
Objects may occasionally be left in the temporary custody of the Museum for such purposes as: possible donation, attribution, examination, research, and identification.

6.3.E.1 The authority for approving Custodial Loans shall be vested in the Curator of Collections, the Executive Director, or other responsible staff member (as appropriate).

6.3.E.2 Handling of such custodial objects should be as expeditious as possible, with the loan period not to exceed ninety (90) days.

6.3.E.3 Objects received on custodial loan may be accorded a level of due care commensurate with the benefit the Museum expects to derive from the loan, however, good public policy dictates that said items should be granted at least the same level of due care Museum staff would grant to similar items in its own collections.

6.3.E.4 Under no circumstances will Museum staff accept objects on Custodial Loan for the purposes of appraisal.

6.3.F  Custodial Loans Documentation
The Curator of Collections shall maintain all records deemed necessary and prudent for the documentation of custodial loans, and will be responsible for monitoring said loaned objects.

6.3.F.1 Staff shall be required to use a Temporary Custody Receipt when receiving objects on custodial loan. No staff member shall be permitted to use a Deed of Gift for such purposes.

6.3.F.2 Once the Curator of Collections (or the responsible staff member) has determined to receive objects on custodial loan, a Temporary Custody Receipt should be completed and signed by the lender. The form should specify, at a minimum: the lender’s information, duration of the loan, purpose of the loan, and an accurate description of the loaned items.

6.3.F.3 Upon receipt of the loaned items and the signed Temporary Custody Receipt, the Curator of Collections shall be charged with completing the Loan Book entry for the transaction, assigning a loan number, specifying the lender, and indicating the loan purpose. The Curator of Collections (or his appointed staff designee) should then photograph the loan, record the loan in the PastPerfect collections management database, label the individual loan items with green tags (to indicate a loan), and store the loan items with photocopies of the Temporary Custody Receipt until said items may be evaluated for their specified purpose(s).

6.3.F.4 Prior to completion of the specified loan period / purpose, the Curator of Collections shall be charged with the responsibility of evaluating the borrowed
materials for potential acquisition / accession, research, examination, etc. Furthermore, the Curator of Collections shall be responsible for reviewing the terms of the loan agreement, and returning the materials to the lender according to the terms of the loan agreement, if the materials are not accessioned. He/she shall then seek to close out the active loan by thusly drawing a line through the Temporary Custody Receipt and the Loan Book entry in red pen/pencil to indicate the closing of the loan. Said loan paperwork may then be filed in the inactive loan files (maintained in the loan files in the office of the Curator of Collections) if the items are not accessioned, or photocopies may be added to the accession files if the items are indeed accessioned into the permanent collections. The loan status should then be updated in the PastPerfect collections management database. The Curator of Collections shall be charged with completing this process for the handling of custodial loans.

6.3.G General Loans Documentation

6.3.G.1 All loan numbers (incoming, outgoing, and custodial) are handled as follows: The tripartite loan numbers are numbered consecutively with the loan number first, followed by a period, then the four-digit year in which the loan is executed, followed by another period, and finally the item number within the particular loan (eg. the fourth item in the twenty-second loan of 1989 would read 22.1989.4).

The item is labeled with a temporary green tag on which its loan number and a brief description (i.e., “shirt”) is written in pencil.

6.3.G.2 Objects shall be recorded in the Loan Book, as follows:

<table>
<thead>
<tr>
<th>Loan No.</th>
<th>Name</th>
<th>Kind</th>
<th>Exh. Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.1989</td>
<td>John Doe</td>
<td>INCOMING</td>
<td>WWI</td>
</tr>
</tbody>
</table>

6.3.G.3 A file is maintained for each borrower / lender in the active loan file. When a loaned item is used in an exhibit, a copy of the loan form is given to the exhibit designer and a copy is placed in the exhibit file (maintained in the loan files in the office of the Curator of Collections). All original loan documents are kept in the loan files (both active and inactive).

6.3.G.4 When an object is returned to its lender or returned by the borrower, the number is crossed out in both the Loan Book and on the loan agreement form in red, and the file is placed in the inactive loan file. These files are NEVER to be destroyed, purged or otherwise altered in any manner.
6.4 Implementation
These policies and procedures regarding the loan activities of the Museum are implemented through the provisions and delegations of authority enumerated in this Collections Policy & Procedures Manual, as well as through application of the “Guidelines for Exhibiting Borrowed Objects,” issued by the American Association of Museums (AAM). All Museum staff and volunteers shall adhere rigorously to all approved / implemented loan policies & procedures.
7. CARE OF COLLECTIONS

7.1 Definition

*Preventative Conservation-* The protection and stabilization of collections, as well as their associated information, through a coordinated set of activities intended to minimize chemical, physical, and biological deterioration and damage. Preventative conservation aims to prevent the loss of intellectual, aesthetic and monetary value of collections items. Preventative conservation is, and should be, an ongoing collections activity with an ultimate goal of making collections physically, aesthetically, and intellectually available for future use.

7.2 Principles

The preventative conservation and care of collections objects is an essential function of the ongoing work of the Museum, in that these activities preserve the Museum’s *raison d’être*. As a consequence of the high standard of Due Care which should be accorded to collections in the Museum’s trust and the inherent deteriorative nature of museum collections, the Museum requires responsible, disciplined handling, storage, and display of collections via a rigorous adherence to the following principles:

7.2.A The Museum has a responsibility to preserve and safeguard the collections it holds in trust for the public.

7.2.B Preventative conservation is a critical and integral component of professional museum management and ensures that collections are available for future use.

7.2.C The Museum’s ability to carry out its mission is directly related to its ability to preserve its collections and the information inherent therein. Although deterioration is inevitable for physical materials, the Museum strives to control the physical, chemical, and biological factors that can result in deterioration of valuable Museum collections.

7.2.D In addition, it is important that the Museum preserve collection records and any other documentary materials that support the use and preservation of collections items.

7.2.E The Museum, and its staff (principally the Curator of Collections), shall be responsible for developing and implementing preservation strategies and policies that respect the diverse nature of its collections, while providing useful access to those collections.

7.2.F Technical standards for the preventative conservation of collections shall be developed by the Curator of Collections, in accordance with the mission of the Museum and the purposes or present & future needs of the collection.
7.2.G The scope, significance, and quality of the Museum’s collections make it imperative that current research and educational use of collections are balanced with the need to preserve collections for future generations.

7.2.H The Museum shall provide the necessary preservation, protection, and security for all collections acquired, borrowed, and in the custody of the Museum (inclusive of their associated information).

7.2.I The Museum shall balance current research and educational use with the preservation requirements of collection items to ensure that collections are maintained for future generations and rightfully serve their intended purpose(s);

7.2.J Any conservation intervention, restoration, destructive sampling, or consumptive use of collection items must be authorized by the appropriate staff member (i.e. Curator of Collections), documented, and justified for the purposes of preservation or professional scholarship.

7.2.K At all times, Museum and volunteer staff shall be aware of their responsibility to preserve and protect collections objects, and shall act accordingly.

7.2.L Responsibility for all registrarial duties, including (but not limited to): collections database management, collections recordkeeping, packing and shipment of collections, etc. shall ultimately be vested in the Curator of Collections, with authority to designate to appropriate subordinate staff (i.e. Collections Assistant, Registrar, etc.) implicit therein.

7.3 Policy & Procedure

7.3.A Preventative Conservation
Ultimate responsibility for the condition of objects in the collections, both in storage and on exhibit shall be vested in the Curator of Collections, with the authority for monitoring and evaluating preventative conservation measures and the overall condition of collections delegated to subordinate staff at his/her discretion.

7.3.A.1 The Museum must implement preservation policies, standards, and procedures in accordance with the mission of the museum and the nature, purpose and, use of the collections.

7.3.A.2 The Museum must ensure that collections and their associated information are cared for and maintained in conditions that preserve and extend their physical and intellectual integrity for use in exhibition, research, and education.

7.3.A.3 Collections activities shall be predicated upon a concerted preventative conservation program, which advocates: minimal intervention, providing
environmental conditions that minimize harm, permitting handling only by trained personnel and under strict guidelines, use of non-deleterious (i.e. inert, acid-free) materials for storage, packing, and exhibition of collections material, and reversibility of conservation treatments.

7.3.A.4 Physical aspects of the facility affecting the ambient environmental conditions of the collection (i.e. light, temperature, relative humidity, infestation, and air pollutants) shall be monitored weekly by the Curator of Collections and the Collections Assistant, and shall be adjusted accordingly.

7.3.A.5 The Curator of Collections shall prepare a written condition report (replete with photographic documentation) where appropriate, for objects in the permanent collections requiring treatment, or objects on loan or in temporary custody when necessary, producing a baseline record from which the condition of collections objects can be monitored/

7.3.A.6 The Curator of Collections (or his/her staff designee) shall make weekly inspections of objects on exhibit and in storage areas.

7.3.A.7 Changes in the ambient environment or in conditions that affect objects in the Museum’s collections or on loan to the Museum must immediately be brought to the attention of the Curator of Collections, and/or the Executive Director, who shall collaboratively take the necessary actions to rectify the situation.

7.3.A.8 Any damage to or change in condition of Museum collection or loan objects must be reported immediately to the Curator of Collections, who will notify the appropriate staff members, the Executive Director, and the Board of Trustees (as determined by established procedure).

7.3.B Collections Handling Guidelines
Since museum collections are at the greatest risk of damage while being handled or moved, it is important that a standard set of collections handling guidelines be rigorously adhered to. Handling museum collections entails care, cleanliness, and commonsense. The following rules assume that the collections to be handled are relatively stable, pest free, and under two hundred pounds (200lbs.):

7.3.B.1 When handling collections, wear clean, comfortable clothing with no protruding jewelry, watches, or buckles. Do not wear an ID badge or chain around the neck, and always wear clean cotton or thin nitrile gloves (unless the object is very slippery, such as glass, highly-glazed ceramic, and some sculpture). Do not wear gloves when the object’s surface texture or protruding parts will cause gloves to catch. Change gloves as often as they get dirty. Wear an apron or carpenter’s apron to hold gloves and equipment. Remove tools from pockets before handling objects.
7.3.B.2  Know exactly where you will put an object before you pick it up. Map out a moving operation ahead of time to anticipate problems. Check to make sure doors and elevators are clear and can accommodate the object. Avoid stairs unless absolutely necessary.

7.3.B.3  In case of damage, report the circumstances immediately to the Curator of Collections, or (in his/her stead) the Executive Director or Collections Assistant. Save and report anything found in storage or a gallery that might have come off an object. Do not try to repair or restore the object. Report the matter to the Curator of Collections, who will seek the counsel of a qualified conservator.

7.3.B.4  Carry only one object at a time, no matter how small, using two hands. Use two or more people to handle large, unwieldy, or heavy objects; do not hesitate to ask for help.

7.3.B.5  Do not hand an object from one person to another; instead, set the object down and have the second person pick it up.

7.3.B.6  Do not make sudden or unnecessary movements, and never walk backwards. Be aware of what is behind and around you.

7.3.B.7  Move the object in its most stable position, usually in the position in which it is displayed or stored.

7.3.B.8  Protect the object from being bumped, skidded, or jostled. Never work with tools over the object. Do not lift one object over another; move objects one at a time to reach those on the back of a shelf.

7.3.B.9  Handle each object as little as possible. Bring carts or moving vehicles to the object.

7.3.B.10 Use clean pads or carpet squares on the floor or cart. Protect objects on carts from each other with padding (carpet squares, Fome-cor®, bubble wrap, etc.). use acid-free tissue between object and padding. Secure any object being moved on a vehicle. Do not put objects of very different sizes or weights on the same vehicle.

7.3.B.11 Check carts and vehicles for cleanliness, stability, and movability before loading. For large carts, use three people, thusly: one person pulling or pushing, one person on the side to make certain nothing shifts, and the third person left free to open doors, elevators, clear stairwells, etc.

7.3.B.12 Take your time. When handling many objects, work at an even pace, take breaks often, and do not continue to work when you are fatigued.
7.3.B.13 Do not eat, drink, or smoke in or around object storage, display, or preparation areas. Confine these activities to approved areas well away from collections storage, and/or galleries.

7.3.B.14 Please consult preventative conservation sources, or request more information from the Curator of Collections if you have any questions or concerns regarding handling of a particular object or material.

7.3.C Risk Management & Security
(Please refer to the “Historical Museum at Fort Missoula Emergency Disaster Plan,” as well as Section 12 of this document, for policies and procedures designed to protect the Museum collections, structures, grounds, and personnel against fire, flood, theft, vandalism, and disaster. Oversight responsibility for risk management & security shall be shared jointly by the Executive Director and the Curator of Collections.)

7.4 Implementation
These policies and procedures regarding the collections care activities of the Museum are implemented through the provisions and delegations of authority enumerated in this Collections Policy & Procedures Manual, as well as through evaluation of published sources regarding accepted standards of preventative conservation and professional museum practice. All Museum staff and volunteers shall adhere rigorously to all approved / implemented collections care policies & procedures
8. COLLECTIONS DOCUMENTATION & INFORMATION MAINTENANCE

8.1 Definition
Collections Documentation - The approved process within a museum for the capture, storage, maintenance, and preservation of all collections information pertaining to those materials held and maintained by the institution.

Collections Information - The foundation of knowledge surrounding the items in the Museum’s collection. This information includes: Documentation of historical and academic significance, physical characteristics, legal status, and the general provenance of the collection objects before and after their entry into the Museum.

8.2 Principles
The proper maintenance and preservation of a variety of information pertaining to collections objects is an activity essential to the functioning of a collecting institution. Without the appropriately-associated information, collections objects lose their context and relevance and serve of little function to the efforts of the Museum. Therefore, the Museum requires responsible, disciplined recordkeeping and preservation of collections information via a rigorous adherence to the following principles:

8.2.A The Museum endeavors to preserve not only collections objects, but also the information pertaining to those objects, thereby facilitating object tracking, inventory, identification, and research.

8.2.B Proper Museum collections documentation practices permit the public remote access to the collections (where practicable) wherein physical access may be impossible or ill-advised.

8.2.C Museum collections documentation practices shall always strive provide proof of legal ownership of the Museum’s collections.

8.2.D Additionally, proper museum collections documentation practices enable the Museum to meet current professional standards mandating that collections information be thorough, accurate, and accessible.

8.2.E The Museum, as part of its educational mission, seeks to provide the widest possible access to collections information without compromising security, confidentiality, ethical standards, or intellectual property rights.

8.2.F The Museum shall preserve all relevant hard-copy documents in its records, with the intent of retaining these indefinitely. The Curator of Collections shall be charged with the responsibility of oversight for the preservation and active maintenance of original collections documentation.
8.2.G The Museum shall remain apprised of industry-wide documentation standards by consulting trusted colleagues, scholarly publications, and other reputable sources of information. The Museum shall strive to implement these standards within the conduct of its daily operations.

8.2.H No collections records shall EVER, under any circumstances, be purged, destroyed, edited, or otherwise altered except in cases where prudent registrarial practice dictates.

8.3 Policy & Procedure

8.3.A Collections Record Categories

8.3.A.1 An established system for preservation of collections information shall be created, thusly: Collection records may be divided into two general categories, wherein the first includes those records commonly associated with registrarial functions. These records primarily document the legal status of an object within the Museum or on loan from the Museum, as well as that object’s movement and care while under the control of the Museum. The second category involves records associated with curatorial functions. These records provide a broad body of information about an object’s proper place and importance within its cultural or scientific sphere.

8.3.A.2 Registrarial records include a descriptive catalog record, as well as evidence of legal ownership or adverse possession of all objects. These record systems relate to objects via a unique Museum number (eg. accession number, loan number, exhibit number, etc.), thereby providing for easy cross-reference of collections objects with associated information. Collections records of this category further reflect the prior history of ownership of each object, as well as all activity of said objects (i.e. accession, loan, exhibition, conservation, deaccession, disposal, etc.). Records of objects on loan to the Museum reflect all activity of such objects while under the care and control of the Museum.

8.3.B PastPerfect Collections Management Database

8.3.B.1 The Museum shall maintain and update a PastPerfect electronic database (located in the Office of the Registrar, Main Museum- Building 322) for the purposes of preserving accession, catalog, loan, storage, conservation, exhibition, and object tracking information.

8.3.B.2 Although ultimate responsibility for information maintenance within the PastPerfect database shall reside with the Curator of Collections, he/she may designate said registrarial functions to subordinate staff (i.e. Collections Assistant, Registrar, etc.) at his/her discretion.
8.3.B.3 As a complement to the collections information contained within its PastPerfect database, Museum staff (specifically the Curator of Collections and the Collections Assistant) shall produce photographic images of items within the Museum’s collections, as well as of those currently on loan or exhibition and store them within the appropriate PastPerfect database segments for long-term preservation.

8.3.B.4 Museum staff (i.e. Curator of Collections, Collections Assistant, Registrar, etc.) shall perform a periodic backup (daily to internal hard drive, weekly to cd, bi-weekly to external hard drive) of all collections information on the PastPerfect database, and the Curator of Collections shall remove this backup to an offsite location.

8.3.B.5 No collections records / documentation shall ever be removed, purged, destroyed, or otherwise altered within the PastPerfect database, except where prudent registrarial practice dictates.

8.3.C Paper / Hard-copy Collections Records

8.3.C.1 As with all collections records, paper (or hard-copy) collections records will be completed in a timely manner, housed in secure locations, and physically preserved via proper handling and storage methods.

8.3.C.2 The original accession books, accession files, transfer books, and deaccession records are to be housed in a fire-proof cabinet in the Main Museum Building (Building 322). Said books and files shall be stored within and locked each evening. Following completion of the planned collections move to the Post Headquarters Building (Building T1), these collections records will be stored in the new Collections Records Vault.

8.3.C.3 No collections records / documentation shall ever be removed, purged, destroyed, or otherwise altered within the PastPerfect database, except where prudent registrarial practice dictates.

8.4 Implementation

8.4.A These policies and procedures regarding the maintenance and preservation of collections information regarding collections under the care and control of the Museum are implemented through the provisions and delegations of authority enumerated in this Collections Policy & Procedures Manual. All Museum staff, affiliates, volunteers, and researchers shall adhere to the access allowances concerning collections information, as enumerated herein.

8.4.B The Museum shall define and adhere to documentation data standards, in order to maintain accuracy and facilitate access to collections information.
9. INVENTORY

9.1 Definition

**Inventory** - The process of accounting for the physical presence and exact storage location for all items in the Museum’s collection. During this process, a systematic list of the Museum’s holdings is thereby compiled, which may then be checked against existing collections records for completeness and accuracy.

9.2 Principles

The regular and thorough conduct of inventory pertaining to the holdings of the Museum is an essential function in demonstrating the accountability of a collecting institution. Without this information, the Museum is unable to demonstrate that it is exercising due care and control over collections, and/or that it is meeting its fundamental fiduciary trust responsibilities. Therefore, the Museum requires responsible, disciplined inventory practices via a rigorous adherence to the following principles:

9.2.A Regularly scheduled inventories are essential to their fulfillment of Museum duties, by ensuring that security procedures are working, and by enabling the Museum to make decisions regarding the condition, care, and storage of collections.

9.2.B The systematic lists produced during inventories are invaluable in assessing and updating the accuracy of previous collections documentation.

9.2.C Inventories also provide proof that the Museum is responsibly maintaining collections it holds in trust for its beneficiaries, according to the greater legal and ethical obligations place upon museums, specifically, and collecting institutions, generally.

9.3 Policy & Procedure

9.3.A Authority and responsibility for conducting inventories of the Museum’s collections shall be vested in the Curator of Collections.

9.3.B Inventory Frequency

9.3.B.1 A full inventory of all Museum and loaned collections will be made at regular intervals, as staff time and institutional resources permit. Where said time and resources are deemed sufficient by the Curator of Collections and the Executive Director, a full inventory of all Museum collections shall be made every three (3) years, with a full inventory of all loaned collections to be made every two (2) years.

9.3.B.2 Spot inventories of selected portions of the collections shall be conducted by the Curator of Collections (with the assistance of subordinate staff and
volunteer / intern assistance) at least once per year, staff time and institutional resources permitting.

9.3.B.3 Spot inventories of current exhibits will be conducted at the discretion of the Curator of Collections at least once during an exhibit of an eight-month duration, and twice during an exhibit of eight to thirteen months duration, staff time and institutional resources permitting.

9.3.B.4 The inventory book shall be used to designate inventory sequence. Please refer to said book(s), maintained in the files of the Curator of Collections.

9.3.C Inventory Records

9.3.C.1 In all cases, inventory records shall be sufficiently detailed to permit accurate reconciliation with collections records, and shall be maintained indefinitely. These records are NEVER to be purged, destroyed, or otherwise altered in any manner, except in circumstances governed by prudent registrarial practice.

9.3.C.2 Inventory records of the collections shall be maintained indefinitely by the Curator of Collections.

9.3.C.3 Inventory records of exhibit furniture, exhibit props, and collections materials shall be maintained indefinitely by the Curator of Collections.

9.3.C.4 Inventory records of non-collections materials (eg. Education Department, Gift Shop, Office Equipment, etc.) shall be maintained by the appropriate staff members.

9.3.D Misplaced / Missing Collections Objects

9.3.D.1 If an object is missing, all avenues for possible misplacement will be checked first. If there are signs of possible theft, the Police Department shall be notified immediately, and the circumstances recorded by the discovering party.

9.3.D.2 If an object is still missing after two subsequent inventories, the item shall be deemed lost and shall be deaccessioned (at the discretion of the Curator of Collections) with appropriate notations in the inventory and accession files to that effect, and as noted elsewhere under deaccessioned collections.

9.3.D.3 If a missing object is on loan to the Museum or is otherwise not owned by the Museum, the borrower shall be notified within a reasonable time and satisfactory arrangements made regarding the missing object. Said arrangements shall be made at the discretion of the Executive Director. The Missoula County Risk Management Office is also to be notified if the value of the object(s) exceeds $100, in consequence of insurance liability.
9.4 Implementation
These policies and procedures regarding the conduct and preservation of inventory information pertaining to collections under the care and control of the Museum are implemented through the provisions and delegations of authority enumerated in this Collections Policy & Procedures Manual. All Museum staff and volunteers shall adhere rigorously to all approved / implemented inventory policies & procedures.
10. COLLECTIONS DIGITIZATION

10.1 Definition

Digitization - The process of converting materials, representations of those materials, or information regarding said materials held and maintained by the Museum from an analog to a digital format for the purposes of making the holdings of the institution accessible to a wider audience.

10.2 Principles

The conscientious and thorough conduct of digitization regarding the collections held and maintained by the Museum is an essential function in demonstrating the accountability of a collecting institution. Without this information, the Museum may become liable to claims that it is not exercising due care and control over collections it owns or borrows, and that it is therefore failing to meet its fundamental fiduciary trust responsibilities. By contrast, possessing such a digital record not only inures the Museum against such claims, but makes its holdings much more widely accessible to otherwise underserved audiences in furtherance of mission-driven objectives, while providing a baseline record for the identification, tracking, preventative conservation, and study of Museum collections. Therefore, the Museum requires responsible, disciplined collections digitization practices via a rigorous adherence to the following principles:

10.2.A Collections entering the Museum via new acquisition, current loan, or current exhibition shall be given top priority for the purposes of digitization and recordkeeping in the PastPerfect collections management database.

10.2.B Where staff time, institutional resources, and the availability of materials permit, secondary priority for the digitization of collections shall be granted to prior acquisitions, old loans, and previous exhibitions.

10.2.C The Museum shall seek always to conduct its digitization activities of incoming loan items with respect to the stated loan terms, as well as with regard to any and all intellectual property rights of the lender, and to refrain from photographing said collections items where these terms preclude such use. The authority / responsibility for researching and obtaining permissions for uses regarding such rights shall be vested in the Curator of Collections.

10.2.D The Museum shall seek to capture the most accurate and detailed record of all digitized collections items, via the employment of such tools as: Measurement scales (CM), Kodak color scales, Kodak gray scales, and notations pertaining to camera specifications and light sources (where appropriate).
10.3 Policy & Procedure

10.3.A The digitization of the collections of the Historical Museum at Fort Missoula shall be conducted at the joint discretion of the Curator of Collections and the Executive Director.

10.3.B Digitization Process

10.3.B.1 Digitization of the Museum’s collections shall be conducted using archival quality digital photographs, rather than display- or gallery-quality photographs, and digital photographs of the collections taken for these purposes will not be used for exhibition of any kind.

10.3.B.2 A minimum of four (4) archival quality photographs shall be taken of each object representing, respectively: the front, back, proper left, and proper right of the object. Any one of these perspectives, however, may be deemed negligible, at the discretion of the Curator of Collections. Any and all anomalies, wear patterns, or markings on the object that do not form an aspect of its original manufacture will be recorded by photograph. Similarly, any distinctive markings, features, colorations, surface textures, and/or identifying features that serve to accurately document the inherent character of the object shall also be recorded by photograph.

10.3.B.3 Should a gallery-quality photograph be required of an item subject to the process of digitization for the purposes of display or exhibition, said gallery-quality photograph should be taken at the time of digitization, in order to reduce the harmful stresses of light exposure and handling to the collections object.

10.3.B.4 Photographs taken during the digitization process shall be used to identify the container in which the object is to be stored, where appropriate.

10.3.B.5 New acquisitions, loaned materials, and current exhibitions shall be photographed as part of the digitization process. As staff time, institutional resources, and the availability of materials permit prior acquisitions, loaned materials, and exhibitions shall be photographed as an aspect of the digitization process.

10.4 Implementation

These policies and procedures regarding the photographic digitization of collections under the care and control of the Museum are implemented through the provisions and delegations of authority enumerated in this Collections Policy & Procedures Manual. All Museum staff and volunteers shall adhere rigorously to all approved / implemented digitization policies & procedures.
11. INSURANCE

11.1 Definition

Insurance - A promise of future compensation for specific future outcomes affecting the holdings of the Museum.

11.2 Principles

The insurance of Museum collections, structures, and personnel against injury, damage, harm, theft, destruction, etc. is an essential function for any collecting institution, as such action demonstrates not only appropriate concern for the welfare of the human resources of the organization, but also goes a long way toward establishing due care and consideration of those materials placed in the fiduciary trust of the Museum. Therefore, the Museum requires responsible, disciplined insurance practices via a rigorous adherence to the following principles:

11.2.A The Museum shall seek to insure all personnel, collections items, structures, and other holdings in its employ, or under its care and control.

11.2.B The authority / responsibility for insurance matters within the Museum shall reside primarily with the Executive Director and the assembled Board of Trustees.

11.2.C The Museum shall strive to represent honestly and with an abiding concern for integrity the value of all insured holdings connected with its operations.

11.2.D Museum staff shall keep insurance valuations current, and all matters involving a claim against the Museum’s insurance policy shall be reported to the Executive Director and acted upon by Museum staff in a prompt and professional fashion.

11.3 Policy & Procedure

11.3.A Insurance for the Museum staff, collections, buildings, and grounds shall be carried by Missoula County.

11.3.B Insurance volunteer staff of the Museum shall be carried by the Friends of the Historical Museum at Fort Missoula.

11.3.C Insurance proceeds from the settlement of claims for damage and/or loss to Museum collections objects shall be utilized for the conservation, restoration, and/or the replacement of the collections object(s) at issue (as circumstances of the particular case may dictate).
11.3.D  Loaned Collections Objects

11.3.D.1 Outgoing loans are to be insured and paid for by the borrower. Any exception must be authorized in writing by the Board of Trustees.

11.3.D.2 Incoming loan objects are to be insured by the Museum’s general insurance policy, in accordance with the “Conditions Governing Loans” section of the Incoming Loan Agreement.

11.3.D.3 Objects left for custodial purposes shall be insured by the Museum’s general insurance policy, in accordance with the “Conditions” section of the Temporary Custody Receipt.

11.3.E Insurance records shall be maintained with the appropriate object’s applicable file (eg. Accession, loan, or exhibit), and the authority / responsibility for maintaining these records shall reside with the Curator of Collections.

11.3.F Any deviations from established insurance procedures are to be authorized in writing by the Curator of Collections (for objects with an estimated fair market value of less than $5,000), by the Executive Director (for objects with an estimated fair market value between $5,000 - $10,000), and by the assembled Board of Trustees (for items with an estimated fair market value of greater than $10,000). Where appropriate, the Missoula County Risk Manager shall be informed of noted deviations.

11.4 Implementation
These policies and procedures regarding the insurance of collections under the care and control of the Museum are implemented through the provisions and delegations of authority enumerated in this Collections Policy & Procedures Manual. All Museum staff and volunteers shall adhere rigorously to all approved / implemented insurance policies & procedures.
12. **RISK MANAGEMENT & SECURITY**

12.1 **Definition**

*Risk Management*—Risk Management may properly be defined as the process of identification (documentation) and evaluation of risk in order to prevent or to minimize exposure to factors which may cause loss of, damage / harm to, or deterioration of collections objects and/or Museum personnel.

*Security*—Security may properly be defined as the process of generating and implementing a series of measures (including documentation, evaluation, and remunerative action) taken in order to guard Museum collections objects, grounds, and personnel against crime, attack, harm, destruction, or other violation.

12.2 **Principles**

The implementation of a host of measures designed to mitigate risk, damage, harm, or destruction to personnel and property is an essential function for any institution, though for a collecting institution such action demonstrates not only appropriate concern for the welfare of the human resources of the organization, but also goes a long way toward establishing due care and consideration of those materials placed in the fiduciary trust of the Museum. Therefore, the Museum requires responsible, disciplined risk management & security practices via a rigorous adherence to the following principles:

12.2.A The programmatic activities of the Museum inevitably involve an inherent exposure of collections objects to risks of loss, damage, or even destruction. Collections objects may risk such exposure while on loan, in transit, in storage, or while being studied, treated, or handled.

12.2.B Additionally, personnel of the Museum may risk harm or other injury due to a variety of facilities-related and other concerns, including: environmental hazards, danger due to fire or other destructive forces, equipment mis-handling or malfunction, external attack or invasion, etc.

12.2.C Prudent collections management (and overall museum management), therefore, mandates the identification and elimination / reduction of risks to collections objects, grounds, and employee personnel;

12.2.D Hence, any system of risk management requires a precise and thoughtful review of all extant and potential hazards, including though not limited to: natural disaster, vandalism, theft, disease (environmental risk), space limitations / utilization, human error, mechanical or operational system failure, and natural deterioration.
12.3 Policy & Procedure
(Note: Most of the issues addressed in this Section of the Collections Policy & Procedures Manual are addressed in the Museum Emergency Plan, and/or the Missoula County Disaster Plan. This Section is intended only as a supplement to these controlling policy/procedural documents, and in all cases where the terms of the two conflict (or appear to conflict) the terms of the Museum Emergency Plan and the Missoula County Disaster Plan shall control).

12.3.A Through established and accepted professional collections management practices, the Museum shall endeavor to minimize and to control the risk of loss or damage to Museum collections and holdings. To this effect, the Museum employs key controls, locking systems, alarm systems, and video cameras in exhibit areas. Using the KeyMark system the various operational areas of the Museum are given submasters. While senior staff have master keys that allow them to enter all areas, other staff and volunteers are given submasters that restrict them to administrative, exhibit, collections, and maintenance areas; keys are signed out and volunteers are always trained and monitored. To enter more specialized areas (i.e., wall exhibits, collection cabinets), locked key cabinets are kept in the Executive Director's office with access limited to staff using sign-out forms.

12.3.B Furthermore, the Museum shall endeavor to evaluate risks to both property and personnel at the Museum, via a regular system of thorough conservation/facilities analysis and assessment.

12.3.C Staff and employed/associated personnel of the Museum perform their duties under a continuing obligation to be both aware of institutional risk management and security policy mandates, as well as to actively participate. In accordance with these guidelines, Museum personnel shall be expected to promptly note and communicate to the appropriate institutional authority (i.e. Curator of Collections or the Executive Director) those situations and conditions which create the potential for damage or loss to collections or Museum holdings, personal injury to staff members and visitors, and/or legal liability to the Museum as a whole.

12.3.D Effective controls designed to assure proper management of, security of, and accountability for Museum collections, grounds, and personnel shall be deemed to be the proximate responsibility of the Curator of Collections, and the ultimate responsibility of the Executive Director. To this effect, the Museum shall maintain an active contract with Montana Security for the remote monitoring of security and fire alarm systems.

12.3.E At the highest levels, issues of risk management & security at the Museum shall be coordinated through a collaborative effort of the Executive Director and the Curator of Collections.

12.3.F Matters appertaining to the insuring of collections at the Museum shall be coordinated through the collaborative efforts of the Curator of Collections and the Executive Director (see Section 11, above).
12.4 Implementation

12.4.A These policies regarding risk management and security of personnel and collections materials under the care and control of the Museum are implemented through the provisions and delegations of authority enumerated in this Collections Policy & Procedures Manual. All Museum staff and volunteers shall adhere rigorously to all approved / implemented risk management and security policies & procedures.

12.4.B The responsible staff member (i.e. Curator of Collections) shall seek to implement these policies by ensuring that all collections objects are maintained in controlled areas which have been adequately protected against a variety of threats, including, but not limited to: fire, flood, handling, theft, vandalism, natural disaster, etc.
13. **ACCESS**

13.1 **Definition**

*Access* - Access may properly be defined as the opportunity (degree, nature, etc.) for Museum staff, visiting research personnel and representatives of the scholarly community, emergency, maintenance, and security personnel, and members of the general public to utilize (in a variety of ways) the diverse collection resources of the Museum.

13.2 **Principles**

In order to fulfill its mission of, “increasing the knowledge and understanding of the history of the county and city of Missoula, the history of Fort Missoula and the military presence in the area, and the history of forest management and the wood products industry in Western Montana…” the Museum establishes and encourages patterns of access to collections objects and related information via the following variety of methods:

13.2.A Exhibits;
13.2.B Public programming (educational & interpretive);
13.2.C Research / scholarship opportunities;
13.2.D Loans & exchanges of collections materials;
13.2.E Electronic database / cataloguing systems.

13.2.F It shall be institutional policy of the Museum to provide all reasonable access to Museum collections and collections information consistent with (and guided by) the mandates of an institution holding such materials in the public trust, inclusive of legal stipulations, and accepted professional ethical guidelines.

13.2.G As regards access to Museum collections and related collections information, the Museum shall act in a manner entirely consistent with guidelines set forth in the attendant legal and ethical sections of this document.

13.2.H Physical / intellectual access to collections objects and related information shall always be weighed against, and with specific regard to, Museum concerns over preservation and protection of said materials.

13.3 **Policy & Procedure**

13.3.A In meeting its responsibilities as stewards of items in the public trust (and particularly in meeting its primary legal fiduciary Duty of Care), the Museum shall control, monitor, and document all access to and subsequent use of, collections objects
and related information. It shall be Museum policy to effect tight access control to collections materials / information by a variety of means, including but not limited to:

13.3.A.1 Physical / key-control restriction & observation.

13.3.A.2 Electronic observation.

13.3.B Furthermore, it shall be policy of the Museum to further restrict access to collections materials as a consequence of the following considerations, including but not limited to:

13.3.B.1 Collections object / information availability.

13.3.B.2 Institutional resources (space, funding, staff time, etc.);

13.3.B.3 Security.

13.3.B.4 State of collections preservation.

13.3.B.5 Nature of access request, and subsequent usage.

13.3.B.6 Intellectual property rights.

13.3.B.7 Issues of cultural sensitivity.

13.3.C As a non-governmental entity, the Museum is not subject to the stipulations of the Freedom of Information Act (FOIA), which governs access by the public to federal agency records. However, the Museum may be subject to local ‘Sunshine’ and related disclosure statues in the applicable jurisdiction. Mindful of this state of affairs, it shall be Museum policy to reasonably abide by both the letter and spirit of those statutes which may govern access to collections objects and related information; as much as may be practicable within the stipulations set forth in this document.

13.3.D In accordance with standard museum practices, only the Curator of Collections or the Collections Assistant shall have regular, unrestricted access to the collections. In the Curator of Collections’ absence, the Executive Director possess said level of access.

13.3.E Access to collections objects and related records may be granted by the Curator of Collections, Executive Director, and/or the assembled Board of Trustees if such access is deemed prudent and in the best interests of the care, preservation, and security of the collections, as well as the interests and reputation of the Museum.

13.3.F Use Of Collections Photographs
Photographic images held and maintained in the Permanent Collections of the
Historical Museum at Fort Missoula are the property of the Museum. Copy prints generated from the collection may, however, be utilized and even sold by the general public subject to the following conditions:

**13.3.F.1** Said use must pay the cost of processing prints and/or negatives, in addition to a fee determined by Museum staff. Fees and associated costs for this service will be determined based upon the current expense involved in producing copy prints or CD’s. Payment for all copy work from the photographic collections of the Museum shall be made in advance.

**13.3.F.2** If no negative exists, the Museum reserves the right to charge the requestor for the same amount, and the negative (or CD) shall remain the sole property of the Museum.

**13.3.F.3** A signed proposal of intended use should be submitted in writing by the requestor, and should be approved by the Museum before copy prints are released to the requestor. The execution of this requirement, however, shall remain at the discretion of the Curator of Collections, and/or the Executive Director. All image reproductions from the Museum’s collections, however, shall require a completed, signed “Permission Agreement For Use Of Collections Image(s).” Said form shall be drafted by the Curator of Collections, and sent to the requestor for counter-signature. This form shall specify the rights the Museum retains in the image(s), the exact nature of the intended usage and the Museum’s license for said usage, the responsibilities incumbent upon the requestor, and the fees the requestor shall be responsible for in exchange for the service. This form shall be filed in the ‘Permissions’ file, maintained in the Curator of Collections’ Office, and shall NEVER be purged, destroyed, or otherwise altered, except where deemed prudent by standard registrarial practice.

**13.3.F.4** All copy photographs must be credited to the Historical Museum at Fort Missoula in any reproduction, public or private showing. Copy photographs may not be listed as part of any collection other than that of the Historical Museum at Fort Missoula.

**13.3.F.5** Photographs from the collections of the Historical Museum at Fort Missoula may not be mass-produced without prior written approval of responsible Museum staff, i.e. the Curator of Collections or the Executive Director. Two free examples of the printed or published work product containing photographic images from the Museum’s collections must be provided to the Museum at no cost.

**13.3.F.6** The Museum reserves the right to: limit the number of photographic copies from its collections, to restrict the use of rare or valuable images, to ensure that images from its collections are reproduced in good taste and meet the ethical, legal, and scholastic standards of the institution, make special fee quotations for
unusual copy work requests, and to assess a higher fee for copies of graphic objects intended for single mass production or commercial display.

13.3.F.7 Credit lines for photographs reproduced from the Museum’s collections shall read: “Historical Museum at Fort Missoula, Permanent Collection,” or “Historical Museum at Fort Missoula, [Jane Doe] Collection.”

13.3.F.8 The same restrictions applicable to photographs here shall be deemed applicable to all other media as well, both extant and hereafter invented.

13.4 Implementation
All practices and activities inherent to the process of granting access to Museum facilities, collections objects, and related information (either to Museum staff, visiting research personnel and representatives of the scholarly community, emergency, maintenance and security personnel, or members of the general public) shall be conducted in full accordance with the strict procedural guidelines enumerated in this document. All Museum staff and volunteers shall adhere rigorously to all approved / implemented access policies & procedures.
14. INTELLECTUAL PROPERTY RIGHTS

14.1 Definition

Intellectual Property Rights - Rights and protections based on federal or state statutes, such as patent, trademark, copyright, privacy, and publicity. They are intended to protect personal identity and due ownership of original creative works.

14.2 Principles

As a cultural institution which holds and maintains collections in the public trust, dedicates its collecting, programmatic, and exhibition activities towards education ends based upon sound scholarship and integrity, and which relies upon public largesse and the goodwill of the public at large to conduct its affairs the Museum is ever vigilant to ensure that the intellectual property rights of donors, creators, and those likewise associated with the holdings of the Museum are zealously protected. Therefore, the Museum requires a responsible, disciplined protection of these various rights via a rigorous adherence to the following principles:

14.2.A The Museum seeks to protect the intellectual integrity of collections as well as promote wide access to collections for educational purposes.

14.2.B The intellectual property rights held by both the Museum and other entities must be upheld and maintained, while maximizing the educational potential of the collections.

14.2.C The holders of such rights may limit the ways in which a specified collections item(s) may be used.

14.3 Policy & Procedure

14.3.A The collections in the care of the Museum, either loaned, on loan, exhibited, stored, or in any other capacity, may be subject to intellectual property rights owned by the Museum or other entities. The Museum will manage its own collections and those in its custody in such a manner as to avoid any infringement of these rights while promoting the widest possible dissemination of information. The Museum will protect the intellectual property rights of creators and intellectual property owners, including the Museum itself as a holder of such rights.

14.3.B The Museum retains the right to charge fees to outside organizations and individuals to use images of collections items. Typically, the service for this fee shall amount to a nominal charge ($25.00), in addition to the cost of production.

14.3.C The Museum may rely on the doctrine of Fair Use in making reproductions of collections for standard museum purposes, such as: Archival, research, educational, exhibition, and other similar uses. Fair use determinations will be made independently.
for each collection item, taking into consideration the legal parameters of the Fair Use Doctrine.

14.3.D Responsible Museum staff (i.e. Curator of Collections) shall be charged with the responsibility to determine whether or not intellectual property rights or other restrictions attend to collection items proposed for a variety of purposes (acquisition/accessioning, loan, etc.). It shall be the primary responsibility of the Curator of Collections to ensure that proper steps are taken to acquire any rights necessary for the intended use of the item(s).

14.3.E Furthermore, the Curator of Collections shall be charged with the authority / responsibility of maintaining established policies and procedures for handling and documenting outside requests and permissions to publish or reproduce collections information and images. This shall be accomplished via the use of the, “Permission Agreement For Use Of Collections Image(s)” form. This form shall specify acceptable uses of collections information and images consistent with the mission of the Museum and shall establish therein appropriate fee schedules for these uses.

14.3.F Finally, the Curator of Collections shall ensure that collection records are consulted for potential restrictions or prohibitions to determine permissible image use and reproduction by the Museum and others in all media formats, including but not limited to: print, electronic, audio, video, Internet, and all other forms of media currently extant or hereafter invented.

14.4 Implementation
These policies regarding intellectual property rights of collections materials under the care and control of the Museum are implemented through the provisions and delegations of authority enumerated in this Collections Policy & Procedures Manual. All Museum staff and volunteers shall adhere rigorously to all approved / implemented intellectual property policies & procedures
15. SPECIFIC LEGAL & ETHICAL ISSUES

15.1 Introduction
Certain types of collections present specific issues, due to applicable legal and ethical standards. Should the Museum ever acquire, hold, or manage collections of these types, the Museum must take these legal and ethical issues into account.

15.2 Native American and Native Hawaiian Human Remains and Objects

15.2.A Principles

15.2.A.1 Native American and Native Hawaiian human remains, funerary objects, sacred objects, and objects of cultural patrimony are subject to the terms of the Native American Graves Protection and Repatriation Act (NAGPRA). Under NAGPRA, the Museum is required to compile information about such material, to disseminate the information to and consult with tribes about collections that may be subject to repatriation, and, in certain circumstances, to return such material to affiliated Native American tribes, Native Hawaiian groups, or specified individuals. The Curator of Collections shall be charged with the primary responsibility for complying with the mandates of NAGPRA.

15.2.A.2 In addition to the applicable requirements of NAGPRA, Museum staff should be aware of and sensitive to other issues that arise out of cultural concerns of Native American tribes or Native Hawaiian groups. Such concerns may relate to appropriate standards for the use and management of Native American or Native Hawaiian objects and interests in the intellectual content associated with such objects. Museum staff members are encouraged to consult with Native American tribes and Native Hawaiian groups associated with objects in the Museum’s collection and to take their interests into account at all times provided that such interests are consistent with applicable law and the Museum’s duties for the care and management of its collections.

15.2.B Policy

15.2.B.1 Repatriation of Native American and Native Hawaiian human remains and objects is governed by the requirements set forth in the Native American Graves Protection and Repatriation Act (NAGPRA).

15.2.B.2 Final repatriation decisions are to be made by the Curator of Collections, with final approval to be required from the Executive Director.

15.2.B.3 Any Native American or Native Hawaiian collections whose repatriation are not required by NAGPRA shall be managed in accordance with this directive. Decisions to return or repatriate collection items outside the scope
of NAGPRA will be evaluated and processed in accordance with established procedural guidelines.

15.2.C Implementation

15.2.C.1 The Curator of Collections Manager shall be responsible for ascertaining if any materials in the Museum’s collection include Native American or Native Hawaiian materials to which the requirements of NAGPRA may be applicable.

15.2.C.2 If materials that are relevant to NAGPRA are found in the Museum’s Collections, they will be deaccessioned based upon procedural guidelines enumerated in this document (Section 5, above), and in strict adherence to the mandates of the NAGPRA statute.

15.3 Cultural Property

15.3.A Principles

15.3.A.1 The Museum supports the efforts of local, state, national, and international authorities to protect art, antiquities, national treasures, and ethnographic material from destructive exploitation. The Museum repudiates the illicit traffic in art and cultural objects that contributes to the despoliation of museums and monuments and the irreparable loss to science and humanity of archeological remains. Objects and specimens that have been stolen, unscientifically gathered or excavated, or unethically acquired shall not be made part of the Museum’s assembled collections.

15.3.B Policy

15.3.B.1 Before acquiring or borrowing a collection item, the Curator of Collections must ascertain, from the circumstances surrounding the transaction or knowledge of the item’s provenance, that the collection item was not stolen or wrongfully converted, and therefore is not illegally present in the United States.

15.3.B.2 Before acquiring or borrowing a collection item, the Curator of Collections must ascertain that the collection item was not unethically acquired from its source, unscientifically excavated, or illegally removed from its country of origin after May 9, 1973.

15.3.B.3 The provenance of collection items shall be a matter of public record.
15.3.C Implementation

15.3.C.1 The Curator of Collections shall be responsible for ascertaining if any previously acquired objects are considered cultural property in violation of any legal and ethical statutes.

15.3.C.2 If illegally or unethically acquired objects are discovered in the Museum’s collections, they must be deaccessioned according to procedures enumerated in this document (Section 5, above).

15.4 Biological Material

15.4.A Principles

15.4.A.1 Museum research and collecting activities must be undertaken with sensitivity to continued protection of biological diversity and in compliance with applicable laws protecting animal and plant species, especially those that are threatened or endangered. Field studies and collecting of biological material should be preceded by disclosure and consultation with the proper authorities and interested scientific institutions in the location of the fieldwork. Field activities must be conducted lawfully, support educational and scientific purposes, and not cause undue detriment to the biodiversity and ecological conditions in the area of the activity.

15.4.B Policy

15.4.B.1 Biological material may be acquired by or on behalf of the Museum through field collecting only when such collecting is legally authorized, when the biological material is obtained solely for purposes of scientific research, to add to the Museum’s collections, or for other educational purposes, and when the Museum’s field activities will not cause undue detriment to the biodiversity and ecological conditions in the area of the activity.

15.4.B.2 The Museum will acquire or borrow biological material collected or obtained by others only if it is consistent with established collecting criteria for the transaction, and with all applicable international, national, state, local, and tribal laws.

15.4.B.3 Biological material in the Museum’s collections or custody will be managed in accordance with all applicable legal requirements.

15.4.C Implementation

15.4.C.1 The Curator of Collections shall be responsible for ensuring compliance with legal requirements for all biological material collections transactions.
15.4.C.2 If materials that violate legal guidelines for biological material are found in the Museum’s collections, they shall be deaccessioned according to procedural guidelines enumerated in this document (Section 5, above).

15.5 Unlawful Appropriation of Objects during the Nazi Era

15.5.A Principles

15.5.A.1 Between 1933 and 1945, the Nazi Regime wrought the unlawful appropriation of millions of art objects and other cultural property from their rightful owners, including: private citizens, victims of the Holocaust, public and private museums and galleries, and religious, educational, and other institutions. Some of these objects ultimately were transferred, in good faith and without knowledge of their prior unlawful appropriation, through the legitimate market and may have been acquired by museums. In recent years, public awareness of the extent and significance of Nazi looting of cultural property has grown significantly.

15.5.A.2 The Museum firmly adheres to the “Guidelines Concerning the Unlawful Appropriation of Objects During the Nazi Era,” issued by the American Association of Museums (AAM), and, where applicable, the “Report of the Association of Art Museum (AAMD) Directors Task Force on the Spoliation of Art during the Nazi/World War II Era.”

15.5.B Policy

15.5.B.1 The Museum shall not knowingly acquire collection items that were unlawfully appropriated during the Nazi era without subsequent restitution.

15.5.B.2 If the Museum has acquired in good faith a collection item that is subsequently determined to have been unlawfully appropriated during the Nazi era without proper restitution, the Museum will take prudent and necessary steps to resolve the status of the collection item.

15.5.B.3 The Museum shall abide by the applicable provisions of the AAM and AAMD guidelines regarding Nazi-era objects.

15.5.C Implementation

15.5.C.1 The Curator of Collections shall be responsible for ensuring compliance with all legal and ethical requirements for all objects with potential Nazi-era provenance.
15.5.C.2 If objects that violate legal or ethical guidelines for Nazi-era materials are found in the Museum’s collections, they shall be deaccessioned according to procedural guidelines enumerated in this document (Section 5, above).
16. MONITORING, REVISING, AND COMPLYING WITH THE COLLECTIONS POLICY & PROCEDURES MANUAL

The Curator of Collections shall be responsible for ensuring that the latest professional museum standards are being met (with regards to collections management) and that the Collections Policy & Procedures Manual is being observed and adhered to by all staff (in conjunction with the Executive Director). The Curator of Collections shall also be responsible for making revisions to the Collections Policy & Procedures Manual every three years, or with greater or lesser frequency as warranted. This review process seeks to correct any oversights in previous policy, and to account for new circumstances that have arisen since the last review. Prior to implementation, both the Executive Director and the assembled Board of Trustees must approve all revisions to established Museum policy and procedure. The Curator of Collections shall reports annually to the Executive Director, regarding the Museum’s ability to comply with the Collections Policy & Procedures Manual. Museum staff responsible for collections activities should refer to the applicable Section(s) of this document, as well as all relevant procedural guidelines enumerated in this document.
# Appendix A

Historical Museum at Fort Missoula Forms

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FORM FOR USE OF CAMERA OR VIDEO CAMERA
IN A MUSEUM BUILDING OR HISTORIC BUILDING

My name is __________________________. I am a student at ____________________ in
________________________, ________.

OR: I am a _________________ for ____________________, in _______________, ________.

The purpose for requesting permission to use a camera/video camera [DESIGNATE ONE] the
request is for ____________________. The photograph(s) or film(s) will not be used
for personal gain (e.g., attributing the original to a third party) or profit. The following object(s)
to be photographed or filmed is/are: [BE SPECIFIC]

If a student, the name of the class is _________________, the teacher/professor is ___________,
and the school/university is _________________. I agree that I do not own any copyrights to this
image(s).

The “copy” will carry a courtesy line identifying it as belonging to “[Owner/lender’s name], at
the Historical Museum at Fort Missoula, Missoula, Montana.” If the copy is misused, the above-
named party (or said party’s legal guardian) will be responsible for any and all liability against
the Museum arising from said misuse. I, the undersigned, do hereby agree to the above
provisions, have read same, and fully understand said provisions.

ACCEPTED: ____________________________________________ [SIGNATURE]

Print Name: __________________________ Address: __________________________
Telephone: __________________________

Executive Director/Curator of Collections/Museum Secretary:
__________________________ [SIGNATURE]

Date: __________________________
PERMISSION AGREEMENT FOR USE OF COLLECTIONS IMAGE(S)

By __________

Your rights and responsibilities as regards our images are herein limited as follows. When you sign this form below, you agree to the following terms:

The _______ on the attached CD is for a one-time use by ______ (undersigned) in a __________. Further, you agree that you, or anyone connected with your endeavor, do NOT OWN any rights whatsoever in this image. The image may not be “transferred” or otherwise re-published without the express permission of the Museum. To use an image(s) in any kind of publication, whether private or public, beyond this particular endeavor requires the written permission of the Museum. You may not sell or re-sell any such image for commercial or other purposes beyond the scope of the endeavor specified herein, nor may you grant another party the use of that image for whatever reason except as stated below. In granting you permission to use this image, you will ensure that the proper credit for the source is given as listed below. Having the “digital” image will not give you the right to reuse the image without regard to the rights of the subject within the image or the owner of same.

Specifically, the Museum has agreed that you may use this _________ as a one-time use selected for __________. The credit line for this image should read, “________Collection (accession #), Historical Museum at Fort Missoula, used by permission. All rights reserved.”

You also hereby agree to provide the Museum at no cost a copy of the book or article (i.e., whatever you produce that includes our image(s)). The Museum also has permission from you to use these items in a reasonable manner in any research-related context or exhibit it produces, provided proper credit is given. The Museum does not have any rights in your production other than to use it as an additional resource for exhibition and/or research. Should you decide to sell your production (book/article) at a later date to the general public, the Museum will not take exception so long as proper credit is given and that it is understood the Museum retains copyright in the image(s) used.

In signing this form you agree to the limitations herein expressed, that proper credit of the source will be given, and that no reuse of the research material(s) or image(s) beyond the scope of the endeavor specified herein can be had without the written approval of the Museum. Charges for applicable fees accompany this agreement on the attached Invoice.

I AM USING THE FOLLOWING IMAGE(S) FOR:

_________________________________________________________

WITH MY SIGNATURE BELOW, I ACCEPT THE TERMS AND CONDITIONS AS STATED ABOVE IN THE USE OF THESE MATERIALS AND/OR IMAGE(S).

Date: _____March 02, 2009____

Accepted:

Name: _____________________________________________

Address: ___________________________________________

City/State/ZIP: ______________________________________

Telephone No.: _____________________________________

Signature: __________________________________________

Jason R. Bain, Curator of Collections
**Donor Card:**

**Donor:** ____________________________

**Address:** ____________________________

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DEED OF GIFT TO HISTORICAL MUSEUM AT FORT MISSOULA

By these presents I (we) irrevocably and unconditionally give, transfer, and assign to the HISTORICAL MUSEUM AT FORT MISSOULA by way of gift, all right, title, and interests (including all copyright, trademark and related interests*), in to and associated with the object(s) described below. I (we) affirm that I (we) own said object(s) and that to the best of my (our) knowledge I (we) have good and complete right, title, and interest (including all transferred copyright, trademark and related interests) to give.

The donor understands that the HISTORICAL MUSEUM AT FORT MISSOULA will carefully and continually assess its collection. Items deemed surplus to the Museum’s collection may be exchanged with another institution, returned to the donor, or otherwise disposed of in accordance with the Museum’s Collection Management Policies and Procedures. The Museum acknowledges receipt on this date of the physical delivery to the Museum of the gift as described above.

_______________________________  Signature____________________________
Museum Representative (Please Print)  Title_____________________________
Date of Receipt of Gift & Deed_______________________________

(Print Donor’s Name)
Address____________________________
City________ State___ Zip_____
Phone____________________________  Donor____________________________
(signature)

(Print Donor’s Name)
Address____________________________
City________ State___ Zip_____
Phone____________________________  Donor____________________________
(signature)

*If less than all copyright, trademark and related interest are given specify above or on reverse side of this Deed of Gift. If pages are appended to this Deed, there are ____ pages total, including this page.
### Sample Object Worksheet:


<table>
<thead>
<tr>
<th>Museum:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accession No.:</td>
<td>1975.001.</td>
</tr>
<tr>
<td>Date:</td>
<td></td>
</tr>
<tr>
<td>Or Circa Year:</td>
<td></td>
</tr>
</tbody>
</table>

**Nomenclature**

<table>
<thead>
<tr>
<th>Object Name:</th>
<th>Bathtub</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classification:</td>
<td>Plumbing Fixture</td>
</tr>
<tr>
<td>Category:</td>
<td>Furnishings</td>
</tr>
</tbody>
</table>

**Descr. & Cond.:**

<table>
<thead>
<tr>
<th>Bathtub</th>
<th>Poor Condition</th>
</tr>
</thead>
</table>

**Dimensions (cm):**

| 0.0 x 0.0 x 0.0      |                  |

**Provenance:**

<table>
<thead>
<tr>
<th>Donor:</th>
<th>M.&amp;M. W.H. Leslie</th>
</tr>
</thead>
<tbody>
<tr>
<td>406 Dunn Lane</td>
<td></td>
</tr>
<tr>
<td>Missoula MT 59801</td>
<td></td>
</tr>
</tbody>
</table>

**Insurance Value:**

| $0.00                |                  |

**Value Date:**

| 09/30/1975           |                  |

**Location:**

| Whse                 |                  |

**Location Date:**

| 09/30/1975           |                  |

**Photo? (Y/N):**

| N                    |                  |

**Associations:**

|                      |                  |
Sample Deaccession Form:

Object Name: Magazine
Acc. No.: 82.52.1 - .39
Classification: Documentary Artifact
Category: Communication Artifacts

Object – 32 copies of “Montana the Magazine of Western History” plus 7 indexes
Object Dates: 1951 – 1971
Location:

Dimensions: Inches
H: L: 10-5/8” W: 7-3/4” Dia:

Material: Paper
Condition and Alterations: Good Condition – sturdy and intact.

Description: Collection of 32 varied copies of “Montana the Magazine of Western History” plus 7 indexes; illustrated; see accession sheet for complete listing of individual volumes.

DEACCESSION NOTE: Put in Research Library
Sample Deaccession Note

DONOR: Morse Telegraph Club
Contacts – Kerry Facincani, Sec.
Address: Box 1429; Polson, MT 5960

<table>
<thead>
<tr>
<th>ACCESSION NO.</th>
<th>DATE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1977.19</td>
<td>Spring 1975</td>
<td>Assorted telegraphic equipment, several pieces date back to 1880’s</td>
</tr>
</tbody>
</table>

These items were a loan and never should have been accessioned; returned to Morse Telegraph Club on 8/29/1981/sh [in red]
OUTGOING LOAN AGREEMENT

TO: _________________________________________________________
(borrower’s name)
Address: ____________________________ Telephone (___)___________________

FROM: _____________________________________________
(Executive Director or Curator of Collections)

Telephone (___)___________________

In accordance with the conditions printed on the reverse, the objects listed below are borrowed
for the following purpose(s) only: ____________________________________________

For the period: ____________________________ to ____________________________
(approximate time objects leave Museum until their return receipt)

Location of object(s) while on loan: ____________________________________________

Initiated by: ____________________________
(Curator of Collections’ signature)

_________________________________________________________________________

Accession or Other No. Description of Objects (include size, materials, etc.) Insurance Value

_________________________________________________________________________

INSURANCE: (Please see conditions on reverse.) (Check one.)
___To be carried by Museum, premium billed to borrower _____To be carried by borrower
___Insurance waived

SHIPPING AND PACKING:
Object(s) will be packed by ____________________________ charges to borrower: Yes____

No ________
Object(s) shipped to
(address)

From Museum ___ or other:_____________________________________________________

Shipment to be via: OUTGOING: ________________ RETURN: ________________

Date Shipped: ________________ Date Returned: ________________ (Receipt on Reverse)

CREDIT LINE (for exhibition label/catalog): _______________________________________

SPECIAL REQUIREMENTS for installation and handling: ____________________________
CONDITIONS GOVERNING LOANS

The Borrower agrees to the following conditions of the loan:

A. Protection

Objects borrowed shall be given special care at all times to insure against loss, damage or deterioration. The borrower agrees to meet the special requirements for installation by a member of its staff as a condition of the loan at the expense of the borrower. Upon receipt and prior to return of the objects, the borrower must make a written record of condition. The Museum is to be notified immediately, followed by a full written report, including photographs, if damage or loss is discovered. No object may be altered, cleaned or repaired without the written permission of the Museum. Objects must be maintained in a building equipped to protect objects from fire, smoke or flood damage; under 24-hour physical and/or electronic security; and protected from extreme temperatures and humidity, excessive light, and from insects, vermin, dirt or other environmental hazards. Objects must be handled only by experienced personnel and be secured from damage and theft by appropriate brackets, railings, display cases, or other responsible means.

B. Insurance

Objects shall be insured during the period of this loan for the value stated on the face of this agreement under an all-risk policy subject to exclusions including: wear and tear, gradual deterioration, insects, vermin or inherent vice, repairing, restoration, or retouching process; hostile or warlike action, insurrection, rebellion, nuclear reaction, nuclear radiation, or radioactive contamination. If borrower is insuring the object, the Museum must be furnished with a certificate of insurance or a copy of the policy made out in favor of the Museum prior to shipment of the objects. The Museum Registrar must be notified in writing at least 20 days prior to any cancellation of meaningful change in the borrower’s policy. Any lapses in coverage, any failure to secure insurance and /or any inaction by the Lender regarding notice will not release the borrower from liability for loss or damage.

Insurance value may be reviewed periodically and the Museum reserves the right to increase coverage if reasonably justified. In the event of loss or damage, the borrower’s maximum liability will be limited to the insurance value then in effect.

If insurance is waived, the borrower agrees to indemnify the Museum for any and all loss or damage to the objects occurring during the course of the loan, except for loss or damage from wear and tear, gradual deterioration, inherent vice, war and nuclear risk.

C. Packing and Transportation

Packing and transportation shall be by safe methods approved in advance by the Museum. Unpacking and repacking must be done by experienced personnel under competent supervision. Repacking must be done with the same or similar material and boxes, and by the same methods as the objects were received. Any additional instructions will be followed.

D. Reproduction and Credit

Each object shall be labeled and credited to the Museum. Unless otherwise stipulated in writing by the Museum, The visiting public may take impromptu photographs, but no other reproduction is permitted except photographic copies for catalog and publicity uses related to the stated purpose of the loan.

E. Costs

Unless otherwise noted, all costs of packing, transportation, customs, insurance and other loan-related costs shall be borne by the borrower.

F. Refund/Extension/Cancellation

Objects lent must be returned to the Museum in satisfactory condition by the stated termination date. An extension of the loan period must be approved in writing by the Museum Executive Director or his designate and covered by parallel extension of the insurance coverage. The Museum reserves the right to recall the object from loan on short notice, if necessary. Furthermore, the Museum reserves the right to cancel this loan for good cause at any time, and will make every effort to give reasonable notice thereof.

G. Interpretation

In the event of any conflict between this agreement and any forms of the borrower, the terms of this agreement shall be controlling. This agreement shall be construed in accordance with the law of Montana.

I have read and agree to the above conditions and certify that I am authorized to agree thereto.

Signed: ___________________________  
(borrower or authorized agent)  

APPROVED FOR MUSEUM: 

Title: _____________________________  
(Museum representative)  

Date: _____________________________  

(Please sign and return original.)

Return Receipt

Received said objects listed on front, on __________ , 20__ , from Museum

Borrower  

Museum Representative

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INCOMING LOAN AGREEMENT

FROM: ______________________________ Telephone: _____________________________
(name of lender)

Address: ______________________________________________________________________

In accordance with the conditions printed on the reverse, the objects listed below are borrowed for the following purpose(s): ____________________________________________________

For the period ________________________ to _____________________________________
(from estimated time objects leave lender’s custody until their return and receipt by lender; see “shipping” below.)

No.   Objects Description Insurance
(include size materials, condition, attach recent photo if possible)(Please itemize)

(If additional Space is necessary, attach extra sheet.) (____ sheets attached).

Initiated by____________(Museum representative)

SHIPPING: The following shipping arrangements will be followed unless changed in writing by the Museum after consultation with the Lender.

_____Objects will be shipped from (address): at address on________, 20____ to arrive no later than________, 20____

_____Objects will be returned to above address via:

_____Objects will be delivered by Lender to Museum on date __________, 20____ (unless otherwise notified) via:

INSURANCE: (see Conditions on reverse) ____ to be carried by Museum, ____insurance waived

_____ to be carried by Lender: estimated premium charge $________

COSTS: The Museum will pay costs of picking, shipping and insurance, unless otherwise noted here:

CREDIT LINE (for exhibition label/catalog):

SPECIAL CONDITIONS: ________________________________________________________

Applicable Law: This agreement shall be construed in accordance with the law of Montana.

I have read and agree to the above conditions and certify that I have full authority to enter into this agreement.

Signed: ___________________________ APPROVED FOR MUSEUM: __________________________

*if lender is not the owner, complete the following two lines:

Signed: ___________________________ Title: __________ Date: __________

Title: __________ Date: __________

(Please sign and Return Original)
CONCLUSIONS GOVERNING LOANS

A. Care, Preservation & Exhibition
1. The Museum will give to objects borrowed the same care as it does comparable property of its own. Precautions will be taken to protect objects from fire, theft, mishandling, dirt and insect, and extremes of light, temperature and humidity while in the Museum’s custody. It is understood by the Lender and the Museum that all tangible objects are subject to gradual inherent deterioration for which neither party is responsible.
2. Evidence of damage at the time of receipt or while in the Museum’s custody will be reported immediately to the Lender. It is understood that objects, which in the opinion of the Museum may be damaged by infestation, may be fumigated at the discretion of the Museum.
3. The lender will be requested to provide written authorization for any alteration, restoration or repair. The Museum, for its own purposes, may examine objects by all modern scientific methods.
4. The Museum retains the right to determine when, if, and for how long objects borrowed will be exhibited. The Museum retains the right to cancel the loan upon reasonable notice to the Lender.
5. The items shall remain the property of the lender and shall be subject to withdrawal by him, prior to the above date, provided notice of intention to withdraw is given in writing fifteen (15) days before withdrawal. If said items are on exhibit, the Lender may be subject to certain reinstallment fees to the Museum for the re-design of that exhibit. All such fees are at the discretion of the Museum Executive Director and/or Curator of Collections.

B. Transportation and Packing
1. The lender certifies that the objects lent are in such condition as to withstand ordinary strains of packing, transportation and handling. A written report of the condition of objects prior to shipment must be sent by the Lender to the Museum. Otherwise, it will be assumed that objects are received in the same condition of objects prior to shipment must be sent by the Lender to the Museum. Otherwise, it will be assumed that objects are received in the same condition as when leaving the Lender’s possession. Condition records will be made at the Museum on arrival and departure.
2. Costs of transportation and packing will be borne by the Museum unless the loan is at the Lender’s request or otherwise noted on the reverse of this form. The method of shipment must be agreed upon by both parties.
3. Government regulations will be adhered to in international shipments. As a rule, the Lender is responsible for its country’s import/export requirements and the borrower is responsible for adhering to its country’s import/export requirements.
4. The Lender will assure that said objects are adequately and securely packed for the type of shipment agreed upon, including special instructions for unpacking and repacking. Objects will be returned packed in the same or similar materials as received unless otherwise authorized by the Lender.

C. Insurance
1. Objects will be insured for the amount specified herein by the Museum under its “all-risk” policy subject to the standard exclusions including wear and tear, gradual deterioration, insects, vermin or inherent vice, repairing, restoration or retouching process; hostile or warlike action, insurrection, rebellion; nuclear reaction, nuclear radiation, or radioactive contamination. If the Lender fails to indicate an amount, the Museum will set a value for purposes of insurance for the period of the loan. Said value is not to be considered an appraisal.
2. If the lender elects to maintain his own insurance coverage, then prior to shipping the Museum must be supplied with a certificate of insurance naming the Museum as an additional insured or waiving rights of subrogation. If the Lender fails to provide said certificate, this failure shall constitute a waiver of insurance by the Lender (see no. 4 below). The Museum shall not be responsible for any error or deficiency in information furnished by the Lender to the insurer or for any lapses in such coverage.
3. In the case of long-term loans, it is the responsibility of the Lender to notify the Museum of current insurance valuations.
4. If insurance is waived by the Lender, this waiver shall constitute the consent of the Lender to release and hold harmless the Museum from any liability or damages to or loss of the loan property.
5. The amount payable by insurance secured in accordance with this loan agreement is the sole recovery available to the Lender from the Museum in the event of loss or damage.

D. Reproduction and Credit
1. Unless otherwise notified in writing by the Lender, the Museum may photograph or reproduce objects lent for educational, catalog and publicity purposes. It is understood that objects on exhibit may be photographed by the general public. Unless otherwise instructed in writing, the Museum will credit the Lender as specified on the face of this agreement in any publications. Whether individual labels are provided for objects on display is at the discretion of the Museum.

E. Change in Ownership and/or Address
1. It is the responsibility of the Lender or his agent to notify the Museum promptly in writing if there is any change in ownership of the objects (whether through inter vivos transfer or death) or if there is a change in the identity or address of the Lender. The Museum assumes no responsibility to watch for a Lender (or owner) who cannot be reached at the address of record.

F. Return of Loans
1. Unless otherwise agreed in writing, a loan terminates on the date specified on the face of this agreement. If no date is specified, the loan shall be for a reasonable period of time, but in no event to exceed three years. Upon termination of a loan, the Lender is on notice that a return or renewal must be effected, or else a gift of the objects will be inferred.
2. Objects will be returned only the Lender of record or to a location mutually agreed upon in writing by the Museum and the Lender of record. In case of uncertainty, the Museum reserves the right to require a Lender/claimant to establish title by proof satisfactory to the Museum.
3. When the loan is returned, the Museum will send the Lender a receipt form. If this form is not signed and returned within thirty days after mailing, the Museum will not be responsible for a damage or loss.
4. If the Museum’s efforts to return objects within a reasonable period following the termination of the loan are unsuccessful, then the objects will be maintained at the Lender’s risk and expense for a maximum of three (3) years. If after three (3) years the objects have not been claimed, then and in consideration for maintenance and safeguarding the Lender/Owner shall be deemed to have made the objects an unrestricted gift to the Museum.

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Return Receipt

RETURNED: The undersigned hereby certifies that the items set forth in this contract have been returned in the same condition in which they were loaned to the Historical Museum at Fort Missoula, normal wear and tear excepted.

Returned (date):__________________________  Returned by: ______________________________

Owner:__________________________________

(HMFM)  (signature)
Temporary Custody Receipt

The object(s) listed below are received subject to the Conditions printed on the reverse.

Received from: _________________________________________________________________

(name and address of depositor) Phone: (___)

For the following Purpose:

______________________________________________________________________________

______________________________________________________________________________

Removal date is ______________. Unless otherwise mutually agreed on, the object(s) shall
remain in custody for a limited period of time, not to exceed ____________ days. (See
CONDITIONS on reverse.)

Return of Object(s): ____ will be picked up by depositor  ____ Museum will send by______

Packing and shipping to be paid by __Depositor __Museum to this address:_______________

______________________________________________________________________________

No.  Description of Object(s) (include condition)  Depositor’s Value

______________________________________________________________________________

Executive Director/Curator of Collections: ____________________________ Date received__________

Signed: _______________________________ (over)
CONDITIONS

1. The objects are accepted by the Museum for the benefit of the depositor and the Museum assumes no responsibility except the avoidance of gross negligence. The depositor hereby agrees to release and hold harmless the Museum, its employees, officer, and agent from any liability in connection with the objects while on deposit or in transit except for clear gross negligence.

2. Insurance of the objects is the responsibility of the depositor.

3. Attributions, dates, and other information shown on the face are not to be considered appraisals or official opinions by the Museum. The fact that objects have been in the Museum’s custody shall not be misused to indicate Museum endorsement.

4. Objects may be photographed and examined by modern scientific methods by the Museum for its own purposes, but will not be restored, treated or otherwise altered without written permission of the depositor.

5. In forwarding imported objects for deposit, the depositor is required to comply with all government regulations.

6. If there is a change in the identity and/or address of the depositor or the owner, the Museum must be notified promptly in writing. Objects must be claimed on or before the removal date noted on the face of the Receipt. If one other than the original depositor claims objects, the Museum reserves the right to request proof of legal authority to receive the material before objects will be released.

7. If objects are to be returned to the depositor by man or other carrier, the depositor will be sent an Outgoing Receipt at the time of shipment. Failure to sign and return said Receipt within 30 days of shipment of said objects shall release the Museum from any further liability for the deposited property.

8. If the depositor of record fails to collect the objects or if delivery cannot be effected after the removal date, the Museum will mail a warning to the depositor at its last known address of record to remove. The Museum assumes no responsibility to search for a depositor (or listed owner) not located at the address of record. If after (3) years from the removal date noted on the face of this Receipt objects have not been claimed, then, and inconsideration for their maintenance and safekeeping during such period, the objects shall be considered unrestricted gifts to the Museum.

9. In the event that objects are being offered for sale or donation to the Museum, the depositor, in the absence of written notice to the Museum to the contrary, warrants that s/he upon request is prepared to pass full and clear title to the objects, including any copyright interests.

10. This agreement shall be construed in accordance with the law of Montana.

I have read and agree to the above CONDITIONS, and I certify that I have full authority to agree thereto.

Date: _____________________  Signed: _____________________

*depositor

*if Depositor is not the owner, complete the following:

Name of Owner: ___________________________  Address of Owner: ___________________________

____________________________________________________________________________

Return Receipt

Received said objects listed on front, on __________ , 20__ , from Museum.

________________________________  ______________________________________
Depositor  Museum Representative
## Appendix B
### PastPerfect Forms

<table>
<thead>
<tr>
<th>Form Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover Letter for Deed of Gift Receipt</td>
<td>97</td>
</tr>
<tr>
<td>Deed of Gift</td>
<td>98</td>
</tr>
<tr>
<td>Accession Form #1</td>
<td>99</td>
</tr>
<tr>
<td>Accession Form #2</td>
<td>100</td>
</tr>
<tr>
<td>Accession Form Blank</td>
<td>101</td>
</tr>
<tr>
<td>Deaccession Form</td>
<td>102</td>
</tr>
<tr>
<td>Exhibit Form</td>
<td>103</td>
</tr>
<tr>
<td>Incoming Loan Form</td>
<td>104</td>
</tr>
<tr>
<td>Outgoing Loan Agreement</td>
<td>107</td>
</tr>
<tr>
<td>Temporary Custody Receipt</td>
<td>109</td>
</tr>
</tbody>
</table>
December 3, 2008

Fund Friends Acquisition Friends Acquisition
Missoula, MT 59804

Dear Fund Friends Acquisition Friends Acquisition:

On behalf of the Museum and the community, I would like to thank you for your recent gift to the Museum. Enclosed are an original and one copy of the Deed of Gift for your signature.

Accession# 2008.064

**Donation:**
Scrapbook of clippings re: World War I

In order to complete the donation, please sign both copies of the Deed of Gift. Please return the original in the self-addressed, stamped envelope enclosed. You may retain the copy for your records.

Because of our IRS 501(c)(3) designation, donors may deduct from their federally taxable income the value (determined by the donor) of any donations to us -- including any shipping charges -- as described in the Internal Revenue Code. Your accountant or attorney can advise you further.

Sincerely,

L.J. Richards
Senior Curator
DEED OF GIFT

Name: Fund Friends Acquisition Friends Acquisition
Address: __________________________________________
City: Missoula State: MT Zip: 59804
Phone/H/W: __________________________ Fax: __________________________

By these presents I (we) irrevocably and unconditionally give, transfer, and assign to the HISTORICAL MUSEUM AT FORT MISSOULA by way of gift, all right, title, and interests (including all copy right, trademark and related interests*), in, to and associated with the object(s) described below. I (we) affirm that I (we) own said object(s) and that to the best of my (our) knowledge I (we) have good and complete right, title, and interests (including all transferred copyright, trademark and related interests) to give.

The donor understands that the HISTORICAL MUSEUM AT FORT MISSOULA will carefully and continually assess its collection. Items deemed surplus to the Museum's collection may be exchanged with another institution, returned to the donor, or otherwise disposed of in accordance with the Museum's Collection Management Policies and Procedures.

The Museum acknowledges receipt on this date of the physical delivery to the Museum of the gift as described below.

Description of Gift:
Scrapbook of clippings re: World War I

By my signature below I accept the foregoing conditions and acknowledge reading any attached information.

_________________________________________
Date of Receipt of Gift and Deed

Donor/agent

Received by:

_________________________________________

Donor/agent

Museum Curator or Director (Print Name)

* If less than all copyright, trademark and related interest are given, specify above or on reverse side of this Deed of Gift.

If pages are appended to this Deed, there are _______ pages total, including this page.
Accession

Accession # 2008.064

Source: Friends Acquisition, Fund

Address: Missoula MT 59804

Phone/Fax: 

Date received: 12/02/08

Received by: L.J. Richards, Sr. Cur.

Received as: Purchase

Accessioned by: dli

Date accessioned: 12/03/2008

Acknowledged by Registrar: Yes ☐ No ☐

Purchase price or value: $

Description: Scrapbook of clippings re: World War I

Restrictions: None

Remarks: Scrapbook of newspaper clippings kept by Martha Jaiky of Missoula.
## Accession

<table>
<thead>
<tr>
<th>Object ID</th>
<th>Object name ---- Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>L 2008.064</td>
<td>Scrapbook ---- Newspaper clippings kept on World War I by Martha Jalky of Missoula</td>
</tr>
</tbody>
</table>

Total Objects: 1

Restrictions:

None

---

Accession # 2008.064
# Accession

<table>
<thead>
<tr>
<th>Accession #</th>
<th>Other #</th>
<th>Date received</th>
</tr>
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<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Source</th>
<th>Received by</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<table>
<thead>
<tr>
<th>Address</th>
<th>Accessioned</th>
</tr>
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<tbody>
<tr>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Date accessioned</th>
<th>Acknowledged by Registrar Yes [ ] No [ x ]</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Received as</th>
<th>Purchase price or value $</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<table>
<thead>
<tr>
<th>Object ID</th>
<th>Object name</th>
<th>Description</th>
</tr>
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<tr>
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<table>
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<tr>
<th>Total Objects:</th>
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<table>
<thead>
<tr>
<th>Restrictions:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accession#</th>
</tr>
</thead>
</table>
### Deaccessioned Items

<table>
<thead>
<tr>
<th>Item</th>
<th>1989.088.001 ~ Building, cabin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deacc date</td>
<td>09/28/2006</td>
</tr>
<tr>
<td>Catdate</td>
<td>07/20/2001</td>
</tr>
<tr>
<td>Accession#</td>
<td>1989.088</td>
</tr>
<tr>
<td>Source</td>
<td>Hayes Ranch</td>
</tr>
<tr>
<td>Other#</td>
<td></td>
</tr>
<tr>
<td>Oldno</td>
<td></td>
</tr>
<tr>
<td>Disposal Date</td>
<td>/ /</td>
</tr>
<tr>
<td>Authorized by</td>
<td>L. J. Richards</td>
</tr>
<tr>
<td>Reason</td>
<td>Duplicate number, see: 1977.101</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Collection</td>
<td>Hayes Ranch</td>
</tr>
<tr>
<td>Title</td>
<td>Outhouse</td>
</tr>
<tr>
<td>Creator</td>
<td></td>
</tr>
<tr>
<td>Condition</td>
<td></td>
</tr>
<tr>
<td>Cond notes</td>
<td>Classes</td>
</tr>
<tr>
<td>Current value min</td>
<td>Current value max</td>
</tr>
</tbody>
</table>
EXHIBIT#**** Unintended Consequences: The 1918 Flu & World War I

Curator: L.J. Richards, Sr. Curator
Installer: same

Purpose
Location: Heath Gallery
Transport
Staff
Security
Fire Prevent.

Insurance
Restrictions

Object ID | Object name ---- Description
--- | ---
1978.049.004.b | Hat ---- Missoula City Band members in front of "Daily Missoulian"
1978.049.004.c | Print, Photographic ---- Missoula City Band in front of Stoddard & Price Real Estate, on

Notes
Incoming Loan Form

HISTORICAL MUSEUM AT FORT MISSOULA, Bldg. 322 Ft. Missoula, Missoula, MT 59804

This is to acknowledge receipt of the items listed below from:

Name: ___________________________ Date: 12/10/2008

Contact: ___________________________ Tracking#: ___________________________

Address: ________________________________________________________________

City: __________________ State: _______ Zip: ___________________________

Work#: __________________ Home#: __________ Fax#: __________ Cell#: __________

Website: ___________________________ Email: ___________________________

Insurance information:

Company: ___________________________ Policy#: ___________________________

Rep: ___________________________ Exp date: / /

Phone#: ___________________________ Insured value: ___________________________

Premium: ___________________________

Description:

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<tr>
<th>Object ID</th>
<th>Object name</th>
<th>Description</th>
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</thead>
</table>

Received by: ___________________________ Value: _______ 0.00 Return date: / /

104
Loan Agreement

Institution ___________________________________________ Date Out __/__/____
Name/Title ___________________________________________ Due Back __/__/____
Address _____________________________________________ Phone Work _____________
____________________________________________________ Phone Home _____________
Purpose _____________________________________________
Location _____________________________________________
Transport _____________________________________________
Insurance _____________________________________________
Ins. Value _____________ Value min $________ max _____________

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<th>Object ID</th>
<th>Object name</th>
<th>Condition</th>
<th>Value</th>
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Notes:

I have read and accept the attached conditions of the loan ________________________ Borrower's signature ________________________ Date _____________
Approved and released by: ________________________ Museum Representative ________________________ Date _____________
Terms of Loan Agreement

1. It is understood that the objects in this loan will remain in the condition received and will not be repaired, restored, cleaned, or altered in any way without the permission of the museum. The condition is understood to be as stated on the form.

2. All damage to objects at any point in this loan from the out date until returned will be reported to the museum immediately.

3. The objects may not be lent to a third party without the advance approval of the museum.

4. The objects may be photographed only with the permission of the museum. The borrower agrees that the photographs taken of this loan will be used only for the purpose stated on this form and only for the number of times stated. The museum will receive a copy of all photographs for record purposes. All publications of photographs of items in this loan will bear a credit line acknowledging that the objects are the property of the Museum.

5. The borrower is responsible for packing, transportation, insurance, and all other factors of transporting the loan, unless otherwise stated. The borrower is responsible for returning the loan at the time stated.

6. The museum may require proof of insurance, may wish to have its name on the policy, and may wish to receive a copy of the insurance policy.

7. The borrower agrees to use the loan only for the purposes stated on the form.

Borrower hereby acknowledges receipt of the object(s) listed on the attached page(s). The undersigned assumes full responsibility for the objects subject to the conditions printed above until their return.

I have read and accept the above loan conditions ____________________________________________  __________  __________

Borrower's signature   Date

Approved and Released by: ____________________________________________  __________  __________

Museum Representative   Date

Prepared by: ____________________________________________  __________  __________

Museum Representative   Date

Loan returned and accepted by: ____________________________________________  __________  __________

Museum Representative   Date
Outgoing Loan Agreement

HISTORICAL MUSEUM AT FORT MISSOULA, Bldg. 322 Ft. Missoula; Missoula MT

Institution: Fun Exhibit
Name/Title: Rick Hilton - testor
Address: 9971 E. Mississippi Ave.
          Denver CO 80231
Purpose: Exhibit test
Location: Main exhibit hall
Transport: NA
Insurance: 
Ins. Value: $1,000,000.00

Object ID | Object name | ---- | Condition | Value
--- | --- | --- | --- | ---

Notes:
American General policy# 2334565

I have read and accept the attached conditions of the loan. Borrower’s signature Date
Approved and released by: Museum Representative Date

Loan # 9  Page 1
Terms of Loan Agreement

1. It is understood that the objects in this loan will remain in the condition received and will not be repaired, restored, cleaned, or altered in any way without the permission of the museum. The condition is understood to be as stated on the form.

2. All damage to objects at any point in this loan from the out date until returned will be reported to the museum immediately.

3. The objects may not be lent to a third party without the advance approval of the museum.

4. The objects may be photographed only with the permission of the museum. The borrower agrees that the photographs taken of this loan will be used only for the purpose stated on this form and only for the number of times stated. The museum will receive a copy of all photographs for record purposes. All publications of photographs of items in this loan will bear a credit line acknowledging that the objects are the property of the Museum.

5. The borrower is responsible for packing, transportation, insurance, and all other factors of transporting the loan, unless otherwise stated. The borrower is responsible for returning the loan at the time stated.

6. The museum may require proof of insurance, may wish to have its name on the policy, and may wish to receive a copy of the insurance policy.

7. The borrower agrees to use the loan only for the purposes stated on the form.

Borrower hereby acknowledges receipt of the object(s) listed on the attached page(s). The undersigned assumes full responsibility for the objects subject to the conditions printed above until their return.

I have read and accept the above loan conditions

Borrower's signature ______________________________  Date ______________

Approved and Released by:

Museum Representative ______________________________  Date ______________

Prepared by:

Museum Representative ______________________________  Date ______________

Loan returned and accepted by:

Museum Representative ______________________________  Date ______________

Loan # 9 to Fun Exhibit. Return by 12/31/1999
Temporary Custody Receipt

HISTORICAL MUSEUM AT FORT MISSOULA
Bldg. 322 Ft. Missoula
Missoula MT  59804

This is to acknowledge receipt of the items listed below by the HISTORICAL MUSEUM AT FORT MISSOULA from:

<table>
<thead>
<tr>
<th>Name:</th>
<th>Date: 02/09/2000</th>
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<tbody>
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<td>Work#:</td>
<td>Home#:</td>
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<td>Website:</td>
<td>Email:</td>
</tr>
</tbody>
</table>

The items listed below are left in the custody of the HISTORICAL MUSEUM AT FORT MISSOULA to be considered as:

- [ ] An unconditional donation. The Museum reserves the right to keep, lend, or otherwise dispose of the donated material.
- [ ] To be considered for acquisition.
- [ ] For identification. Does not constitute an authentication; will not include appraisals. Museum reserves the right to photograph.
- [ ] For other. Please specify:

Disposition if not accepted for accession:

- [ ] Source will pick up
- [ ] Please dispose of or destroy
- [ ] May be sold to benefit

HISTORICAL MUSEUM AT FORT MISSOULA

Items and Description


Received by:  
(Signature)  
(Date)

Received from:  
(Signature)  
(Date)