



# **HISTORICAL MUSEUM AT FORT MISSOULA**

## **COLLECTIONS MANAGEMENT POLICY**

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By the Missoula County Board of Trustees for Museums

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By the Friends of the Historical Museum

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# I. INTRODUCTION

The Historical Museum at Fort Missoula (HMFM) was established in 1975 to collect, preserve, and interpret the history of Missoula County and western Montana for the education and cultural enrichment of visitors and area residents. The project began with the efforts of a few citizens to save one log cabin and has since evolved into a 32-acre history complex. Missoulians were concerned that too much history – not just Fort history but all aspects of Montana’s heritage – was being lost. The museum was founded to provide a refuge of sorts for the history and artifacts of the area. As the county’s only historical museum, HMFM serves a major need for the people that live within the community.

In establishing the Museum, HMFM has committed to the development, preservation, study, and display of its permanent collection. Items from the collections will be made available to the public through permanent on-site exhibits and rotating gallery exhibits, educational programming, research requests, as well as professional scholarly work and digital content created by Museum staff for local community members and visitors from around the world.

## a. **Homelands Statement**

The Historical Museum at Fort Missoula acknowledges that we are in the homelands of the Salish and Kalispel people. We offer our respect for their history and culture, and for their wisdom in caring for this place for generations to come.

## b. **Mission Statement**

The mission of the Historical Museum at Fort Missoula is to keep Missoula County’s history alive for the education and enjoyment of the public.

## c. **Vision Statement**

The vision of the Historical Museum at Fort Missoula is to inspire a sense of place and history for Missoula County by collecting, studying, interpreting, and preserving the region’s cultural and natural heritage.

# II. CODE OF 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,’ as well as the ‘Code of Ethics’ to which all Museum employees are required to adhere.

## **HMFM ensures that:**

- Collections in its custody support its mission and public trust responsibilities.

- Collections in its custody are lawfully held, protected, secure, cared for, and preserved.
- 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.
- Access to the collections and related information is permitted and regulated.
- Acquisition, disposal, and loan activities conform to the Museum's mission and vision.
- Disposal of collections through sale or trade is solely for the advancement of the Museum's mission and proceeds from sales shall be used in a manner consistent with the standards and best practices of the museum field as guided by the American Alliance of Museums.
- The Museum does not treat its collections as assets for the purposes of reporting on its financial statements.

**All board members, volunteers, and staff members working with the collection on behalf of HMFMM must adhere to the following guidelines:**

- They will act to preserve the physical and intellectual integrity of all objects in the collections.
- They must refrain from personal collecting that competes with HMFMM's interests.
- They will not use the collections for personal use, either on or off the premises or for any purpose contrary to this Collections Management Policy.
- They will not capitalize or treat a collection artifact as a personal financial asset.
- They will not participate in valuations or appraisals of materials being offered to the collection, coming in on loan, or for the general interest of the public.

**Regarding the acquisition and maintenance of collections, HMFMM complies with local, state, and federal laws that could affect any collections activities including the following specific ethical concerns:**

- Native American Graves Protection and Repatriation Act (NAGPRA) – The protection and return of the Native American and Native Hawaiian human remains, funerary objects, sacred objects, and objects of cultural patrimony
- Cultural Property Laws - The protection of art, antiquities, national treasures, and ethnographic material from destructive exploitation.
- Guidelines Concerning the Unlawful Appropriation of Objects During the Nazi Era – The repatriation of materials that had been stolen and relocated throughout this period of history.
- 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.
- Endangered Species Act - 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.

### III. STATEMENT OF PURPOSE AND AUTHORITY

This Collections Management Policy establishes policies and modes of implementation for the successful maintenance of collections held and managed by the Historical Museum at Fort Missoula. It shall provide guidance to the HMFM Collections Staff in collections activities including acquisition, disposal, loan, exhibition, handling, and preservation care for artifacts. All procedural documentation for these activities will be found in a separate Procedures Manual to be used in the daily operations of the department. All Museum staff, volunteers, and interns must be familiar with the policy outlined in this document prior to working with the collections at HMFM.

**This Policy shall be reviewed and evaluated at a minimum of every three years** to ensure that all collections activities conform to any changes made to the code of ethics put forth by the American Alliance of Museums, HMFM's mission or vision statements, or up-to-date conservation and preservation techniques in the field.

HMFM's Curator of Collections will be responsible for reviewing and updating this policy, with input from additional collections staff. Prior to the implementation of any revisions to this policy, it must be approved by both the Board of Trustees and the Friends of the Historical Museum Board.

### IV. HMFM'S PERMANENT COLLECTIONS

The collections of Historical Museum at Fort Missoula initially started with the artifacts and buildings that were cared for by the Western Montana Ghost Town Preservation Society. As the only organization concerned with the history of the Missoula area, the society became an obvious home for objects from citizens throughout the county. In the early 1970s, the idea of including a new museum in the historic fort complex project came to fruition including proper storage and exhibition facilities. Collections have continued to grow for the past 50 years and currently HMFM maintains one of the largest historical collection of objects in Western Montana with over 50,000 objects.

Among the Museum's collections are invaluable examples of City of Missoula and Missoula County history, the military history of Fort Missoula, and the history of forest management and the timber products industry in Western Montana. The Museum's collections represent a diverse range of materials and disciplines, including: photographs, archival materials, historic structures, textiles, and a vast collection of three-dimensional objects. 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.

#### a. Scope of Collections

The collections at the Historical Museum at Fort Missoula document the social, cultural, political, religious, military, and technological history of people in Missoula County and its environs. The Museum restricts the historical scope of the Permanent Collections to the 1860s to the present. Items offered to the Museum as donations to the collections that

fall outside of this time period may sometimes be accepted following a thorough review of authenticity, relevancy, and condition though this is not common.

The geographical scope is restricted to Missoula, Missoula County, or Western Montana. The strength of the collection lies in documenting and representing the domestic and business environments of the people living in Missoula County from the turn of the century to the present. These artifacts reflect the changing notions of home, family, women, and division of labor over time in our community.

The current collections scope, while true to the general mission and goals of the Historical Museum at Fort Missoula, has not always been clearly defined. The Museum has always been a collection-driven institution and early on it became a “catch-all” for objects and buildings that local residents wanted to preserve. Past curators had particular collecting interests that guided the collection’s growth outside of the set mission statements and they often followed a grassroots collecting model of accepting most anything that was donated to the Museum. This has led to widely varied and sometimes skewed collecting practices following staff turnover. Due to current storage constraints, the Museum will now be making a concerted effort to be more judicious when considering new acquisitions and closely follow the Collecting Goals listed in Section IV.d of this policy.

## **b. Why we collect artifacts**

It is generally acknowledged that museums cannot collect every object related to the cultural commonwealth of an area and because of this, HMFMM has specific reasons for collecting artifacts that are to be preserved, displayed, and cared for by the Collections Department.

- i. **Additions to the Permanent Collection** – Artifacts that follow the goals and guidelines outlined in this policy will be added to the Permanent Collections. These objects are representative of our collecting themes outlined in HMFMM’s mission and vision statements and are significant artifacts that will not otherwise be preserved and protected. All objects that become part of the Permanent Collection will be properly acquisitioned per the procedures laid out in this policy.
- ii. **Use of collections for display in temporary exhibitions** – When curating a new temporary exhibition, the Curator will review current collection holdings to assess if any items apply to the exhibition content and are suitable for display. Although there will be a primary focus on using our collections, there might be an instance that an exhibition will be installed in HMFMM’s temporary gallery spaces that requires the display of objects that the Museum does not own. In those instances, the following actions will be taken:



1. The Curator will fully outline the objects that are needed for an exhibition and facilitate loans from another organization to be put on display or acquire them for the Permanent Collection, when appropriate.
  2. Due to storage capacity and staffing, HMFM will not accept objects into the Permanent Collections on the basis of possibly being used in a future exhibition.
  3. All objects that will be used for display in exhibitions, either in exhibitions hosted outside of HMFM's gallery spaces or provided by other organizations for an on-site exhibition, will be properly loaned as per the procedures laid out in this policy.
- iii. **Acquired during a mass trauma event in our community** – If a mass trauma event occurs in the community, a need might arise to preserve the history of that event as it happens. The role of HMFM and the support our organization can provide during these events are significant and we should be prepared to aid our community in the best way that we can.
1. See Appendix 1 for a full Emergency Response Plan – Responding to a Mass Trauma Event.

### **c. What we do not collect**

After over 50 years of collecting, HMFM has identified a few areas that no longer need additional representation within the Permanent Collection. The Museum has built relationships with other cultural heritage organizations in Missoula that collect within these areas and will direct donors to them when these kinds of objects are offered to HMFM.

- i. HMFM does not accept large archival donations – for example boxes of archives from a local organization or business. HMFM will consider accepting donations of archival materials that are specifically related to either the military history of Fort Missoula (1877-1947) or to other existing accessioned HMFM artifacts. Materials that do not fit this criteria will be directed towards the University of Montana Archives and Special Collections at the Mansfield Library for potential acquisition.
- ii. HMFM does not collect artifacts related to general military service unless specifically related to Fort Missoula. These artifacts will be directed towards the Rocky Mountain Museum of Military History for potential acquisition.
- iii. Although the Museum does address aspects of the Native American experience in Western Montana through exhibits, programs, and special events, HMFM does not actively collect Native American materials and artifacts. These artifacts will be directed towards the Three Chief's Cultural Center for potential acquisition.

If these types of materials cannot be accepted by an appropriate cultural heritage organization as defined by the Historical Museum at Fort Missoula, HMFm will consider the donation for the Permanent Collection using the Acquisition Guidelines set forth in this policy.

#### **d. Collecting Goals**

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 and form the foundation for research, scholarship, exhibition, public programs, and outreach. Specific collecting goals are as follows:

- i. HMFm seeks relating to the early history of Fort Missoula, including artifacts, maps, and land use surveys particularly the following eras:
  1. The 25<sup>th</sup> Infantry Era
  2. The CCC Era
  3. The Alien Detention Center Era
  4. The Disciplinary Barracks Era
- ii. HMFm seeks items to illuminate under-represented stories and groups. The goal is to acquire items that provide a much clearer representation of the minorities that lived (and continue to live) in Missoula County.
- iii. HMFm seeks artifacts to prominent Missoula and Missoula County businesses. The goal is to acquire items that exhibit the unique entrepreneurial spirit of Missoulians throughout our community's history.
- iv. HMFm seeks artifacts that represent the more modern era (post-1980) of the lives of people living in Missoula County and its environs. The goal is to acquire items significant to events, societal changes, and community activities that embody our community's lived experiences.

#### **e. Historic Buildings, Structures, and Oversized Artifacts**

The museum grounds are the home of several buildings, historic structures, and oversized outdoor artifacts. Some of these are original to Fort Missoula while others were originally located elsewhere in the Missoula County area and were moved to this location to prevent their destruction elsewhere. They are now used to interpret the history of Western Montana. These buildings and structures are every bit as significant as items in our

Permanent Collections for telling the whole story of the region. Taken by themselves, these structures have no relationship to each other, but viewed as a whole, they provide the museum with the opportunity to augment its indoor displays and interpretive programs with authentic buildings and on-site demonstrations.

i. Categorization

The buildings, structures, and oversized artifacts found on the museum grounds were, in the past, accessioned items in the permanent collection. After reviewing their condition and care needs as well as the capacity of museum staff and available resources, it was decided to deaccession them from the collection. They remain on our grounds as an important interpretive tool for our visitors. A complete inventory list of these buildings, structures, and oversized artifacts can be found as part of HMFm's Master Site Plan. Documentation and provenance for how they came to our site will be maintained in the HMFm Building Files and their previous Accession Records.

ii. Care

HMFm is committed to the continued preservation of the buildings, structures, and oversized artifacts on the museum grounds. They will continue to receive regular preservation and maintenance by the museum staff. Their continued care will be outlined in the HMFm's Master Site Plan; the Plan will track both significant preservation work as well as regular maintenance performed on these items and will be updated every 5 years. Preservation work will be conducted by Facilities staff. When extensive preservation treatments are required, they will be completed by experts or field professionals. All documentation of work completed will be maintained in the HMFm Building Files.

iii. Authority

The care and preservation of the buildings, structures, and oversized artifacts on the grounds will be managed and coordinated by multiple Museum departments. The following outlines the individual responsibilities and authority for each relevant staff or department:

- HMFm's Building & Grounds Committee (consisting of Museum staff representatives and HMFm board members) will be responsible for reviewing potential care needs and preservation projects for these buildings, structures, and oversized artifacts. Their input will be reflected in the HMFm Master Site Plan.
  - The Curator of Collections will participate in Building & Grounds Committee meetings to provide preservation and conservation care feedback about all items under this categorization.
- Regular maintenance will be carried out by Facilities Staff whenever possible. If a project or part of their care falls outside of their abilities,

the museum will hire an outside contractor to complete the work necessary to maintain the integrity of the buildings, structures, and oversized artifacts.

- Any necessary outside contractors will be hired by the HMFMM Executive Director. The Curator of Collections will be expected to provide input on the qualifications for those hired to conduct work on items under this categorization whenever appropriate.

iv. Insurance

All buildings, structures, and oversized artifacts on the museum grounds will be covered under the Missoula County Property Insurance.

v. Acquisition of New Buildings and Structures

Although HMFMM is not actively seeking new buildings to be brought to the grounds, the Museum will consider accepting custody of a new building or structure if it falls within our institutional mission and comes with accompanying financial support to cover the costs of preservation and maintenance.

## V. HMFMM EDUCATION COLLECTION

In addition to the Permanent Collection, HMFMM also has an Education Collection of objects that do not require formal accessioning for preservation purposes as they will be used regularly by Museum staff/volunteers and visitors. These materials and artifacts have been deemed appropriate for use in interactive educational programs and as exhibit elements. These items are generally reproductions, duplicates, or expendable objects of lesser quality that would still represent some historical significance.

### a. Authority

These objects are maintained and stored under the direction of HMFMM's Education Director. They are responsible for making final decisions on what objects will be taken into the Education Collection, how they will be used, and how they will be discarded.

### b. Acquisition

Items within this collection can come to the Education Department in a few different ways:

- i. Not accepted donations – If an item offered for acquisition review for the Permanent Collection was not accepted and the donor does not want the item back, it can be offered to the Education Collection. If accepted, it is the responsibility of the Education Director to work with the donor to fill out the appropriate transfer paperwork.

1. See Appendix 2 for a sample Education Collection Donation Receipt.
- ii. Deaccessioned collections – If an item has been deaccessioned from the Permanent Collections but might still be useful for historical interpretation, it may be offered to the Education Collection. If accepted, the Curator of Collections will be responsible for completing the appropriate transfer paperwork and maintaining a log to track all transfers between collections.
  1. See Appendix 3 for a sample Transfer of Title form.
- iii. Direct offers – Items can also be offered directly to the Education Department for use in educational programs. If accepted, it is the responsibility of the Education Director to work with the donor to fill out the appropriate transfer paperwork.
- iv. See HMFM Collections Department Procedure Manual for more information about the process of accepting items to the Education Collection.

## VI. ACQUISITION OF OBJECTS

The process for accepting and documenting artifacts for the Permanent Collection is called **accessioning**. After an object has gone through the accession process, it is the legal property of HMFM. It is the Museum's responsibility to remain diligent in activities such as the acquisition of artifacts to ensure that all standard and up-to-date museum practices are being followed.

### a. Sources of Acquisitions

The Museum acquires collection items by a variety of methods, including:

- i. Gifts – The title of the object passes to the Museum during the life of the donor.
- ii. Bequests – The title of the object passes to the Museum after the life of the donor.
- iii. Purchase – The direct purchase of an object.
- iv. Field collecting – The method used to excavate or collect an object through archaeological practices.

### b. Acquisition Guidelines

The Museum requires responsible, disciplined acquisition of collections via a rigorous adherence to the following principles:

- i. Acquisition decisions are guided by the mission and vision statements, scope of the collections, current HMFM collections holdings, and collecting goals and priorities.

- ii. 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.
  - 1. As a 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. Exceptions to this rule may be approved in accordance with established procedures.
- iii. Every accessioned object in the Permanent Collection may be made available for display and use in Museum exhibitions, virtual and physical, as well as educational or preservation-related programming at any time after the accession process has been completed. To ensure this policy, all donations must be in either display condition or a condition in which the Museum has the resources to restore and maintain.
- iv. 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.
- v. Only objects that are deemed to be authentic shall be accessioned into the Museum's Permanent Collections. Duplicates or forgeries will not be accepted for the Permanent Collections. Reproductions will be considered on a case-by-case basis to either be accessioned into the Permanent Collections or be added to the Educational or Exhibit Prop Collections.

### **c. Legal and Ethical Criteria**

The Curator shall consider the following legal and ethical criteria in determining whether to accession a donation in its collections.

- i. The possessor of the donation must be the sole owner of the object and valid title to the donation must be completely passed to the Museum.
  - 1. 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, to determine that the Museum can acquire a valid legal title to the collection item.
- ii. All rights to the donation must be conveyed to the Museum.
- iii. Accession of the donation must not violate applicable state, national, or international laws or conventions that protect the rights of the artists or the rights of countries to their cultural history.

- iv. The donation must be free of donor restrictions or qualifications that inhibit prudent use of the object by the Museum unless agreed upon in writing prior by the Curator before the donation of the item.

**d. Acquisition Authority**

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

**e. Accessions Documentation**

Each donation to the collections shall have an associated accession file that will be maintained by the Curator of Collections and can be used to prove the Museum's clear legal title to the objects within the permanent collection. The accession files must include any transfer documentation, additional communications with the donor, and all documents relating to the acquisition, care, use, condition, deaccession, and disposal of the donated items.

i. Physical Accession Files

Paper accession files will be maintained in the following manner:

1. Accession files will be stored by accession number in chronological order.
  - a. Accession files from the past three years will be stored in the Curator's office.
  - b. Accession files older than three years will be stored in the Records Room.
2. No accession file or its contents (whether active or deaccessioned) shall ever be destroyed or purged.
3. Accession files will continue to be updated with new information about the related objects as continued maintenance and care practices are performed as part of the daily work of the department.

ii. Digital Accession Files

HMFM will begin digitizing accession files and collections documentation as staff capacity allows. These files will be maintained by the Curator of Collections and contain digital versions of content typically stored in the physical accession files.

1. See the HMFM Collections Department Procedure Manual for more information about this process.

iii. Collections Management Database

The Museum shall maintain and update a collections management database for the purposes of preserving accession, catalog, loan, storage, conservation, exhibition, and object tracking information.

Although ultimate responsibility for information maintenance within the database shall reside with the Curator of Collections, he/she may designate said registrarial functions to subordinate staff (i.e., Collections Assistant, Registrar, etc.) or trained interns/volunteers at his/her discretion.

iv. Documents and Information Required for an Accession File

1. Signed and completed Deed of Gift
  - a. Substituted for a Record of Purchase if applicable
  - b. See Appendix 4 for a sample Record of Purchase
  - c. See Appendix 5 for a sample Deed of Gift
2. Provenance Information
  - a. This is often found on the Deed of Gift or any additional communications or documents provided by the donor.
3. Original Temporary Custody Receipt form (noted as accepted with a date and staff initials)
  - a. **Note:** Not all items will need a Temporary Custody Receipt, so this may not always be found in the Accession file.
  - b. See Appendix 6 for a sample Temporary Custody Receipt
4. Relevant scholarly materials related to the donation/object(s)
5. Any created condition and preservation reports relating to the donation/object(s)
  - a. See Appendix 7 for a sample Condition Report

**f. Temporary Custody**

Objects may occasionally be left in the temporary custody of the Museum for potential acquisition – for example when donations are dropped off onsite when the donor has not already been in contact with the Curator of Collections. These items must be handled in the following way:

- i. Temporary custody should not exceed 90 days. An acquisition decision must be reached before that time limit expires.



- ii. Objects in temporary custody must be granted the same level of care that the Museum would grant items in its own collections.
- iii. Under no circumstances will Museum staff accept temporary custody of objects for the purposes of appraisal for donors or the general public.
- iv. All objects left in the temporary custody of the Museum shall be required to have a Temporary Custody Receipt upon receipt of the objects. This form is not the same as a Deed of Gift.
- v. A record for temporary custody items must be created in the Museum's collections management system for tracking purposes.

**g. HMF M Numbering System**

The Accession Number and Object ID are to be used for tracking purposes in the daily maintenance of collections artifacts and their records by collections staff and volunteers. The Museum uses the compound numbering system, separated by periods, to create Accession Numbers.

- i. The first part of each collection item number is the year in which the donation was made.
  - 1. This should be written in four digits.
- ii. The second part of the number represents the transactional group that the object was donated/acquired.
  - 1. This number is based on the previous donation and should be written in three digits.
  - 2. Example: the thirty-second collection donated in 1989 would be assigned the number 1989.032.
- iii. All accessioned objects in the Museum's Permanent Collection are required to have a unique "Object ID" number. This number is made up of a combination of the accession number and the number count of the object within the donation group.
  - 1. This last number should be written in three digits.
  - 2. Example: the fifth object in accessioned collection 1989.032 would be assigned the number 1989.032.005
- iv. Found in Collection Items have a different style of Accession Number – Please see Section VII.b of this policy to create an Accession Number for one of these items.

## VII. FOUND IN COLLECTIONS ITEMS (FIC)

Some of the artifacts found in HMFM's collection storage areas no longer have legal paperwork associated with them, meaning the Collections Department does not have any record of who donated the item, what the item is, and how the item can be used. Objects and artifacts that no longer have any documentation are called "**Undocumented**" artifacts (UA). When these artifacts cannot be reconciled within the collections paperwork, storage, or loans, they officially become **Found in Collections Items (FIC)**.

### a. Finding an Undocumented Artifact

When Museum staff, volunteers, or interns working in the Collections Department come across an item in storage that does not have any associated numbers or documentation, HMFM agrees to:

- i. **Make a reasonable effort to determine the object's status** – This includes using the Museum's collections database and physical accession records to try and find donor and accession information related to the item.
  1. Additional information on how to reconcile an Undocumented Artifact can be found in the HMFM Collections Procedure Manual.
- ii. **Assess the object** – If there no associated documentation can be found, the object will be assessed by the Curator as a new incoming donation using the following criteria:
  1. Is the object relevant to the current objects in the Permanent Collection?
  2. Does the object fit the Museum's collection goals and activities?
  3. Does the object fit the Museum's mission and vision statements?
  4. Is the item in good physical condition?
  5. Is the item rare or unique in some way even without additional provenance information?
- iii. **Make an appropriate acquisition decision about the object** – The Curator will make the final decision about the object based on the above criteria and other research completed in the assessment process. An Undocumented Artifact can either be accepted or rejected.
  1. If accepted, it is the responsibility of the Curator to decide whether it will become part of the Education Collection or be accessioned into the Permanent Collection as a Found in Collections item.
  2. If rejected, the Curator will be responsible for disposing of the Undocumented Artifact appropriately.
    - a. See Section VII.c of this policy for guidance on disposal of Undocumented Artifacts.

## **b. Creating an Accession Number for FIC Items**

An Accession Number and catalog record should only be created for Found in Collection Items that the Curator has accepted into the Permanent Collection. These items will be cataloged differently from a standard incoming donation. By assigning them a uniquely formatted Accession Number, Collections Staff will have an easier time finding the Found in Collection Items records in the inventory database in the future.

The Accession Number created for these items will still be created in the compound system, separated by periods, but will follow the following format:

- i. To distinguish these Found in Collections items from other items in the collection, the first part of the Accession Number will be FIC.
- ii. Since we do not know the year that the Museum received the item, the next part of the Accession Number will be the year in which it was processed as an FIC.
- iii. Next use the transactional group that the object was found (based on the last group of FICs found).
- iv. To create a unique Object ID for an FIC object, a third number is added to the accession number. This is the number count of the object within the donation group (based on a group of items that you are adding to the accession catalog for FIC at the same time).

1. For example, the Accession Number will look like this:  
FIC2017.012.003

**Please note:** This FIC Accession Number will be retired if the original Accession Number or catalog record is found.

## **c. Disposing of a Rejected UAs or FICs**

When deciding to dispose of any UAs or FICs, HMFm acknowledges that there may be legal ramifications to disposing of an item that might have been loaned or that the general public might have an opinion about the retention of specific items. Those factors must be taken into consideration when a decision is being made.

### **When handling UA or FIC item disposal, HMFm agrees to:**

- i. Complete an exhaustive search for any possible accession or donation documentation information (both physical and in the Museum's collections database).
  1. If any source information is found, the item will be treated as an undocumented loan, and Curator will attempt to contact the source.
  2. If no source information has been found, the item should be considered "Abandoned Property," as defined below.

- ii. Comply with Montana State Legislature regarding loaned property deposited at museums as follows found in the Montana Code Title 22 Chapter 3 Part 5.
- iii. Assess the level of immediate action that needs to be taken for each UA or FIC item to designate the steps and efforts that must be taken for their disposal. This review will include but is not limited to, the assessment of the item's deterioration rates and the space requirements for the object.
- iv. Prepare and distribute an explanation for the public to avoid any confusion or misunderstandings concerning the disposal of museum property.
- v. Plan a procedure for how to handle any incoming inquiries related to posted information about the UA or FIC Items or the disposal process.
- vi. Require clear and verifiable documentation from anyone claiming to be the owner or an heir of the owner.
- vii. Carefully document the change of title process for each UA or FIC Item individually to avoid any further ownership claims.
- viii. Appropriately dispose of the items after title ownership has been transferred to the Museum. This includes offering the object to another museum or non-profit organization as a gift, selling the object to benefit HMFMM collections, or disposing of the item entirely.
- ix. Keep all related documentation created through the reconciliation and accession review process for the UA or FIC item. These will be maintained with other collections donation paperwork by the Curator of Collections.

## VIII. LOANS

The lending and receipt on loan of collections objects is fundamental to the work of the Museum in that they promote the dispersal of educational information regarding the holdings of the Museum and like institutions to broader audiences than would otherwise be possible. Due to the high standard of care expected for collections, the Museum adheres to responsible lending and borrowing practices.

### a. Loan Types

HMFMM will allow the following loan types:

- i. **Incoming Loans** – Objects, printed media, and other materials may be borrowed for use in a temporary gallery exhibition in HMFMM galleries or another specific programming purpose for a designated amount of time.
- ii. **Outgoing Loans** – Objects, printed media, and other materials may be loaned out of the Permanent Collection to multiple venues if part of a sanctioned HMFMM Traveling Exhibition or upon request by other institutions for use in their exhibits or programming.

1. All institutions requesting the loan of items from the Permanent Collections at HMFMM must be officially approved by the Curator of Collections. The care and safety of the objects being loaned is of the utmost priority and institutions must be able to meet the loan criteria listed below.

**HMFMM does not accept long-term loans or promised gifts.** All objects offered to the Museum for extended display and care must become part of the Permanent Collection subject to standard acquisition processes.

## **b. Loan Criteria**

Loans are acceptable if they fall within the following criteria:

- i. HMFMM collections will only be lent for the purposes of public exhibition, research, conservation treatments, and other educational endeavors.
- ii. All loans to or from the Museum must adhere to all applicable federal, state, local, and international laws, treaties, and regulations.
- iii. Collections both loaned by the Museum and on loan to the Museum will be insured, as specified in an authorized loan agreement.
  1. The Museum retains financial responsibility for the continued oversight of its collections, regardless of length and type of loan.
- iv. It is the responsibility of the Curator of Collections to approve whether the condition of an object is stable enough to be loaned as part of an Outgoing Loan.
- v. All agreements for incoming or outgoing loans will specify publication and photographic rights as well as scholarly access.
- vi. No material or object on loan to or loaned from the Museum shall, in turn, be loaned to individuals or institutions, receive conservation treatments, or be used in traveling exhibits except by written consent of the lender.
- vii. Specific citation requirements shall be designated in the Loan Agreement forms.
  1. All outgoing loans of Museum collection artifacts require citation information for HMFMM to be prominently displayed.
  2. All incoming loans to HMFMM will be cited prominently following the guidelines provided by the loaning institution.
- viii. Loan Length – All loans entered into by the Museum are to run for a specified time period, with an option for renewal.
  1. See Appendix 8 for an Outgoing Loan Extension Agreement Sample
  2. See Appendix 9 for an Incoming Loan Extension Agreement Sample

- ix. **Loan Conditions** – Every loan HMFm participates in must meet agreed-upon loan conditions. All standard loan conditions can be found on the back of the Loan Agreement forms. Any changes to the terms or conditions of the loan need to be agreed upon in writing by both institutions and kept with the completed Loan Agreement files. HMFm reserves the right to terminate a loan at any time if the terms and conditions of the loan have been broken.

### **c. Loan Documentation**

*All loans must have the following documentation filled out and signed by the lender and the borrower before a loan can be initiated:*

- i. **Loan Agreements** - The Loan Agreement serves as a contract between the lending and borrowing institutions. This document protects both parties by specifying all conditions to be agreed upon for the loan including information about shipping, care and handling, insurance, and duration of the loan. The two loan types approved by HMFm require specific Loan Agreements to be completed.
  - 1. See Appendix 10 for sample Incoming Loan Agreement
  - 2. See Appendix 11 for sample Outgoing Loan Agreement
- ii. **Condition Reports** - The Condition Report is a thorough acknowledgment of the condition that the loan item is in when the loan is first received and when the loan is being returned.
  - 1. For any Outgoing Loan, HMFm will provide information about the item from the Permanent Collection including descriptive information from the catalog record and the original condition of the item. The borrowing institution will then need to fill out condition information upon receipt and return of HMFm's artifact.
  - 2. If a formal Condition Report is not provided by the lending institution for an Incoming Loan, HMFm will use their Condition Report form to acknowledge the condition of the item when it arrives at HMFm. This form will then be approved and signed by the lending institution and added to the Loan File.
    - a. See Appendix 7 for sample Condition Report
- iii. **Additional Documents** - At the discretion of the lender, various records may be required of the borrower (which would be HMFm in the case of incoming loans), including but not limited to:

1. Certificates of insurance
2. General facilities reports

If the borrower chooses not to comply or is unable to comply, the lending institution shall be vested with the authority to remove the object from the borrower's custody, and subsequently to terminate the loan agreement.

***The following documentation will be used internally by HMFPM collections staff to monitor and maintain loans:***

- iv. **Loan Numbers** - All loan numbers (incoming and outgoing) are handled as follows: Loans 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. Individual objects within the loan will be assigned an additional number to be added to the initial compound loan number.

1. Example: 22(consecutive loan number).1989(year).4(item number)

- v. **Loan Log** - All loans (incoming and outgoing) shall be recorded in the Loan Log. This log tracks all types of loans the Museum may engage in and allows for quick reference in the event of issues with any past loans. The log shall be created and maintained digitally as an Excel spreadsheet to be kept on the Curator's external hard drive.
- vi. **Loan Files** - A loan file is maintained for all loans HMFPM participates in. These files are NEVER to be destroyed, purged, or otherwise altered in any manner. Active loan files shall be kept in the Curator's office and all inactive loan files shall be stored in the Collections Records Room.

Loan files will be digitized as staff capacity allows. Digital loan files will be maintained by the Curator of Collections.

***The following documentation shall be kept in each loan file:***

1. A signed copy of the loan agreement form
2. Insurance and courier information
3. Condition reports
4. Additional correspondence between the borrower and the lender
  - a. See Appendix 12 for a Loan Letter sample
  - b. See Appendix 13 for an Incoming Loan Return Receipt sample

#### **d. Loan Authority**

The authority for approving both incoming and outgoing loans shall be vested in the Curator of Collections. It is also the Curator's responsibility to monitor all active loans as

well as maintain any and all appropriate loan files and entries in the Loan Book.

#### **e. Insurance**

As stated in both types of loan agreements, the borrowing institution is responsible for insuring loans and the lending institution is responsible for providing an appraised and agreed-upon monetary value of the loan for insurance purposes. However, in the case that the lender is required to continue their coverage in effect when making outgoing loans, the borrower will be billed for the cost of the insurance premium.

- i. In accepting the borrower's coverage, the Museum will consider the following:
  1. Limits of the Coverage – All coverage should be “all-risk” or “wall to wall.”
  2. Deductibles
  3. Exclusions
  4. Property Insured
  5. Policy Terms
  6. Terms of Cancellation

#### **f. Courier Policy**

Packing and shipping arrangements, including scheduling and courier needs, must be mutually agreed upon between both institutions in writing before the start date of the loan. HMFm reserves the right to specify the type of carrier and method of shipment to be utilized during the conduct of the loan.

- i. The lending institution is responsible for clearly denoting:
  1. Object fragility
  2. Special needs
  3. Courier schedule
  4. The preferred mode of transportation
- ii. The borrowing institution is responsible for:
  1. Obtaining an estimate for packing and any preparation
  2. Insurance
  3. Courier costs
  4. Arrangements for transporting the loan
  5. All costs associated with shipping
- iii. HMFm reserves the right to bill the borrower for packing charges based upon exact hours worked and the actual cost of material used.



## **IX. DEACCESSION AND DISPOSITION OF COLLECTIONS ITEMS**

It is generally acknowledged that a museum cannot collect everything, and collections need refinement along the way for true and healthy growth. Deaccessioning is generally viewed as part of good museum collection management. The judicious thinning of existing holdings is considered beneficial to developing a collection that truly serves its institution. It allows the museum to focus attention on its core collections and prevents museum resources from being reduced by unnecessary preservation and collection care work.

Because interests and objectives change and subsequent acquisitions may be in better condition or more useful for the Museum's purposes, no guarantee can be made that the artifacts will always remain under ownership of the Museum or in the collection designated herein. All accessioned materials, articles, or objects belonging to HMFMM are subject to deaccessioning and disposal. Any objects that are no longer appropriate for the Museum collections based on the organization's Mission, Vision, and activities are recommended for deaccessioning.

### **a. Legality of Deaccessioning**

Deaccessioning is not an activity to enter into lightly. It is recommended that the procedures for disposing of an object from the accessioned collections be as rigorous as those for accessioning. It is important to consider the legal factors in disposing of an object, and, at the same time, remember that the museum exists to serve the public. When considering deaccessioning objects from their collections, it is important to maintain the confidence of the public served by the institution. By remaining in open and honest communication with the public about how the museum will be handling all deaccessions, the organization will be able to maintain public confidence and support.

The law generally seeks to lower the use of deaccessioning in museums and usually conducts a simple test to determine whether museum officials have violated their responsibilities regarding their oversight of collection activities. The museum must be able to ensure that all its activities related to collections and deaccessioning practices have been in the best interest of the organization as well as the community.

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.

### **b. Deaccession Authority**

It is the responsibility of the Curator of Collections to make all deaccession recommendations. These recommendations will be made following the deaccession criteria below and must be approved by the Executive Director and both Boards before disposal can occur.

### **c. Deaccession Criteria**

The deaccession of an object from the Permanent Collection of HMFMM will always involve the review of the Museum's Mission and Collecting Plan, and will only be considered when the objects are:

- i. No longer within the collecting scope or the mission of the museum
- ii. Beyond the capability of the museum to maintain
- iii. Not useful for research, exhibitions, or educational programs in the future
- iv. Duplicates of other accessioned collection items
- v. Found to contain hazardous materials
- vi. Subject to a legislative mandate, e.g., repatriation
- vii. Subject to contractual donor restrictions the museum is no longer able to meet
- viii. Deteriorated beyond usefulness

No donated object shall be deaccessioned for any reason within three (3) years of the date of its acquisition.

### **d. Disposal of deaccessioned objects**

If the Boards have approved an object for deaccession, it must be disposed of appropriately. **The following conditions govern the disposal of objects:**

- i. The Curator is responsible for suggesting an appropriate means of disposal as part of the approval process.
- ii. Before the item can be disposed of, the Curator must assess whether it would be an appropriate addition to the Education Collection.
- iii. If removed from the Museum's collections at any point, these artifacts may not be returned to the original donor. The Museum is not required to notify the original donor of an artifact's removal from the collections.
- iv. If deaccession is required by law (i.e. repatriation), the object shall be immediately offered to the appropriate community entity.

- v. All objects being disposed of should first be offered to another museum or non-profit organization as a trade or a gift before any other methods of disposal can be considered.
- vi. If there is not another historical organization or other tax-exempt public institution interested in the object, it may be sold.
  - 1. 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.
  - 2. 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.
  - 3. Funds generated by the sale of deaccessioned objects will be kept in the “Donations to Collections” budget line within the Friends of the Historical Museum at Fort Missoula’s accounting structure.
  - 4. Museum staff and volunteers or members of either board may not be purchasers of deaccessioned museum objects offered either through a private sale or public auction.
- vii. If the object cannot be sold or gifted to another collecting institution, it will be thrown away with regards to any environmental concerns there might be in relation to the object’s materials.

**e. Use of funds from the sale of deaccessioned items**

Funds received from the sale of a deaccessioned object may not be used for general museum operating costs. They may only be used to expand the collections by acquiring new objects or for the direct care of collections.

- i. **Scope of Direct Care** - As an organization with collections of greatly varied size and material type, HMFm has a greater need for funds to care for these artifacts than to acquire new ones. HMFm recognizes the definition of direct care as “to invest in the existing collections by enhancing their life, usefulness, or quality” to ensure that they will continue to benefit the public.
- ii. **Acceptable Uses for Funds** - Funds from the sale of deaccessioned items can only be used to provide direct care to HMFm’s accessioned collections. Funds can be used for the following activities:
  - 1. Purchasing archival quality supplies to provide proper enclosures for artifacts within the collections
  - 2. Purchasing cabinets and other storage furniture for use in storing the current collections and providing growth room for future donations

3. Purchasing equipment to monitor and improve the environmental conditions within storage areas
4. Covering the costs for conservation treatments for artifacts – both for in-house treatments and those completed off-site at conservator labs

Funds may only be used for the activities above if they have already been identified by the Curator of Collections as a need to improve collections care based on the Direct Care of Collections Matrix generated by the American Alliance of Museums in March 2019. The Museum will apply guidelines advised in any future revisions of the matrix to the deaccession process. A list of applicable projects or supply needs shall be maintained by the Curator at all times.

- iii. **Decision making authority** - The Curator of Collections is responsible for suggesting an appropriate use of these funds for projects or needs on the lists kept within the department. The Curator must get approval from the Executive Director for the intended use of these funds before any action can be taken. For any use greater than \$1,000, the Executive Director must receive approval from both boards to use funds for the suggested activity.

#### **f. Documentation of deaccessioned items**

All deaccessioned objects will be marked as such in the Museum's collections database. Deaccession memos and documentation containing information about the reasoning for the objects being deaccessioned shall be placed in the object's original Accession file. Accession files for deaccessioned objects shall NEVER be purged, destroyed, or altered in any manner.

1. See Appendix 14 for a sample Deaccession Recommendation

## **X. COLLECTIONS CARE AND MAINTENANCE**

The preventative conservation and care of collections objects is an essential function of the ongoing work of the museum and must adhere to professionally accepted standards. The museum strives to continually improve its environmental, storage, and exhibition conditions so that optimal curatorial care and maintenance can be provided.

*Due to the inherent deteriorative nature of museum collections, the museum requires responsible, disciplined handling, storage, and display of collections and agrees to adhere to the following principles:*

- The museum strives to control the physical, chemical, and biological factors that can result in deterioration of valuable museum collections.

- The museum shall also preserve collection records and any other documentary materials that support the use and preservation of collections items.
- The Curator of Collections shall be responsible for developing and implementing preservation and conservation strategies and policies that respect the diverse nature of its collections, while providing useful access to those collections.
- 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.

#### **a. Storage Spaces**

HMFM shall provide a place for storing materials in its collections. Additional information about each storage space can be found in the “Facilities Overview” document maintained by the Curator. All storage areas will meet the following criteria:

- i. Clean area with fire extinguishers, temperature and humidity monitors, and adequate protection from water pipes and other hazards
- ii. Controlled and secured access with keys only made available to trained staff and volunteers.
- iii. Secure records storage area separated from public use areas
- iv. Sturdy archival-type shelving and weight-bearing floors adequate to support heavy boxes, artifacts, and paper records.
- v. Located in an area separate from all other museum activity
- vi. Designed to minimize light exposure and maintain a stable environment
- vii. Storage equipment and materials will be determined by museum industry standards and conservation guidelines that represent the field’s current and up-to-date practices

#### **b. Collections Care**

Ultimate responsibility for the condition of objects in the collections, both in storage and on exhibit shall be vested in the Curator of Collections. They will be charged with monitoring the overall condition of collections and approving necessary preservation and conservation treatments required.

**HMFM agrees to adhere to the following guidelines:**

- i. Museum staff shall only perform minimal or non-invasive conservation treatments to objects after receiving adequate training. For more extensive collection care instructions, staff shall consult a conservator.

- ii. Any conservation intervention, restoration, destructive sampling, or consumptive use of collection items performed in-house or at a conservation lab must be authorized by the Curator of Collections, documented, and justified for the purposes of preservation or professional scholarship.
- iii. Documentation for any treatments will be stored in the Accession files and catalog record in the collections database for the item.
- iv. The museum will only use of non-deleterious (i.e., inert, acid-free) materials for storage, packing, and exhibition of collections material.
- v. Regular condition assessments will be conducted for high-risk collections.
- vi. The Curator of Collections shall make regular inspections of objects on exhibit and in storage areas.
- vii. Any damage to or change in condition of museum collection or loan objects must be reported immediately to the Curator of Collections.
- viii. Only trained staff, volunteers, and interns will be allowed to handle collections artifacts. Training must occur before they start any projects and written training materials will be made available in office and work areas.
- ix. See Appendix 15 for full collections handling guidelines.

### **c. Environment**

The museum is committed to providing environmental conditions that minimize harm to the collections as dictated by up-to-date museum practices. To ensure that goal, environmental data for the temperature and relative humidity of the collections storage spaces and galleries shall be monitored and tracked by the Curator of Collections. This data shall then be interpreted and utilized to eliminate or ameliorate the negative effects of various environmental conditions, towards a goal of providing stable and appropriate collections storage and exhibition environments. 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 who shall take the necessary actions to rectify the situation.

All HMFm collections, despite their location and use, are subject to the following environmental standards, as dictated by up-to-date museum practices. **Note:** Additional information about HMFm's Environmental Monitoring practices can be found in the HMFm Collections Procedure Manual.

#### **Long-term preservation is affected by:**

- i. Relative Humidity (RH) & Temperature

1. Desirable conditions are identified as follows:
  - a. Maintenance of a stable RH (50-60%)
  - b. Maintenance of a stable temperature (50-72 F)
2. Extreme levels of RH and temperature outside of the desirable ranges or large fluctuations in those levels will be addressed in each space as capacity, resources, and the building envelope will allow
3. These conditions will be specifically taken into account when making decisions about where and how to store each collections object long term

ii. Light

1. Ultraviolet light (UV), the most damaging type of light, should be avoided as much as possible.
2. Light exposure of any kind to objects in the collection should be avoided as much as possible.
3. Objects on display shall be consistently reviewed to ensure proper care regarding light exposure.
  - a. Objects being affected by the display lights will be removed and replaced if necessary.

iii. Air Quality

1. Particulate pollutants such as pollen, dust, fibers, and soot should be kept to a minimum
2. Construction and maintenance activities are prohibited in/around collections unless authorized by the Curator of Collections
3. Collections should be protected from gaseous pollutants

#### **d. Pest Management**

It is the stated goal of the Museum to monitor, manage, and (where possible) to eradicate invasive pest species that may damage or destroy collections, either in storage or on exhibition.

**The museum adheres to the following principles of pest management:**

- i. Pest activity is monitored by visual inspection and pest traps
- ii. Chemical pesticides are not recommended unless absolutely necessary
- iii. Pest infestations are prevented by:
  1. Inspecting objects that come into the museum.
  2. Controlling the sites at which pests enter the museum.
  3. Removing pest attractors, such as food residues, pest carcasses, and mold.

4. Establishing inhospitable environmental conditions for pests.

## **e. Inventory**

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. It is the responsibility of the Curator of Collections to coordinate the inventory of HMFm collections.

### **i. Schedule**

HMFm collections inventories will be guided by the following inventory schedule:

1. A wall-to-wall inventory of all Museum collections will be conducted every five years, as staff time and institutional resources permit.
  - a. During this process, Collections Staff will review every object in the Permanent Collection and review its location and preservation status.
  - b. All inconsistencies found in the inventory process will be noted and updated in the object's catalog record in the collections database.
  - c. The last wall-to-wall inventory was completed in 2017.
2. A spot inventory of the Permanent Collection will be conducted as part of regular inventory and rehousing projects completed by museum staff, volunteers, and interns throughout the calendar year.
  - a. If severe issues are found during the spot inventory process, a full inventory of that collection or storage space will take place.
3. Inventories of exhibit galleries will occur regularly by the Curator during weekly opening and closing procedures.
  - a. Special attention will be made to objects that are not under plexi or inside display cases to assure condition has not changed and theft or damage has not occurred.
  - b. All museum staff are responsible for monitoring objects on display during opening and closing procedures. They must notify the Curator if there are issues with artifacts on display in any of the exhibit galleries as promptly as possible.
  - c. If damage or theft occurs, inventory frequency shall be increased to ensure the safety of collections items.



4. Inventories of collections in outbuildings will occur twice a year – once at the closing of the buildings in the winter and once at the opening of buildings in the spring.
  - a. As part of these inventories, staff will not only account for all objects in a building, but also to track their condition over time.
  - b. If damage or theft occurs, inventory frequency shall be increased to ensure the safety of collections items.
  - c. This inventory only applies to accessioned museum artifacts. The objects in the buildings that are part of the Education Collection will be inventoried and maintained by the Education Director.

The Curator of Collections oversees the collections inventory process including schedule and ongoing projects. Information about inventory projects is also captured in the year end collections reviews.

#### ii. **Documentation**

Lists of collections created and annotated during the inventory process will be saved digitally on an external hard drive maintained by the Curator. Scans of the lists will be kept in perpetuity will be retained for five years and then disposed of.

## **XI. COLLECTIONS DIGITIZATION**

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. Possessing such a digital record also makes the museum's 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.

#### **HMFM agrees to:**

- Digitize and document all incoming donations to the collections and store digital copies in the collections database as well as on an external hard drive maintained by the Curator of Collections.
- Where staff time, institutional resources, and the availability of materials permit, efforts will be made to digitize collections from prior acquisitions to be stored in the same manner listed above.

#### **Authority**

It is the responsibility of the Curator of Collections to ensure all rights are respected in the digitization of the collections and disbursement of all digital materials.

## **XII. RISK MANAGEMENT**

Museum collections are susceptible to risks resulting from physical forces, fire, water, criminals, pests, pollutants, light, incorrect temperature, incorrect relative humidity, theft, damage, and custodial neglect. HMFM ensures that the necessary precautions will be taken to provide security for the collections in response to these risks.

### **a. Insurance**

The insurance of Museum collections, structures, and personnel against injury, damage, harm, theft, destruction, etc. is an essential function for any collecting institution.

- i. **Collections Coverage** - The collections are presently insured under a Fine Arts Insurance Policy coordinated through the Risk Management offices of Missoula County. This policy is updated annually.
- ii. **Loan Coverage** – Outgoing loans from HMFM are to be insured by the borrower under their own wall-to-wall insurance policy. Incoming loans will be covered under the Fine Arts Insurance Policy that covers HMFM’s permanent Collections. All loan insurance must be reviewed and agreed to by both parties before the loan may be initiated.
- iii. **Buildings** – Historic buildings, structures, and oversized artifacts on the site shall be covered under the general Missoula County Property Insurance Policies. This includes electronic equipment and office furniture.
- iv. **Claims** - 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. 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).

### **b. Disaster and Emergency Planning**

The Historical Museum at Fort Missoula has developed a Disaster and Emergency Plan that establishes effective procedures and training materials for staff and volunteers to utilize in dealing with potential emergency situations. This document includes a section on both Collections Evacuation and Collections Salvage and Triage that should be followed in the event of an emergency. This plan shall be reviewed annually by the Disaster and Emergency Action Team unless an earlier review is deemed necessary by the Boards.

### **c. Security**

HMFM is committed to ensure the safety and security of its collections both in storage

and in exhibitions. The Museum utilizes a security alarm system for all the historic structures on our campus. It is the responsibility of the Curator of Collections to manage the dispersing of keys to collections storage spaces as needed.

#### **d. Training**

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. It is the responsibility of the Curator of Collections to ensure that all staff, volunteers, and interns who handle HMFM's artifacts have been properly trained prior to working in the collections department.

#### **e. Backups**

The continued maintenance and backups of collections information is key to the museum's ability to function both in times of regular operations and of crisis. It is the responsibility of the Curator of Collections to ensure backups of the collections database and other digital collections documentation are completed regularly and according to procedure.

### **XIII. ACCESS TO COLLECTIONS**

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. To fulfill that mission, the museum establishes and encourages patterns of access to collections objects and related information via the following variety of methods:

- Exhibits
- Public programming (educational & interpretive)
- Research / scholarship opportunities
- Loans & exchanges of collections materials
- Publicly accessible digital databases
- Public research files

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.

#### **a. Considerations**

Physical/intellectual access to collections objects and related information shall always be weighed against museum concerns over preservation and protection of said materials. The security and the condition of the collections must always be carefully considered prior to the approval of access requests. The museum ensures that:

- i. If an advanced request has been approved, the collections will be made available outside of general exhibitions, within reason, to students, faculty, and visiting scholars.
- ii. All credentials and motives of researchers will be examined upon receiving an access request.
- iii. Accession information, such as donor personal information and value, may be kept confidential and protected as such.
- iv. All research requests will be stored so that Collections staff can keep track of the museum objects that are being researched.
- v. Unauthorized personnel and the public are subject to be accompanied by the authorized museum staff, board members, or volunteers when working with or viewing collections and their associated documents.
  1. Authorizations can only be designated by the Curator.

## **b. Access Requests**

The Curator of Collections has the sole responsibility for reviewing and approving access requests. They are also responsible for safeguarding the collection and reserves the right to prohibit suspicious individuals from viewing objects or entering storage spaces and reject any requests that cannot be completed due to lack of resources and staff time. **Due to limited staff time and resources, all collections access or research requests must be submitted at least 2 weeks in advance for approval.**

## **c. HMFm's Public Research Files**

In response to growing demand for research requests, HMFm created the Public Research files as a way for visitors to conduct research on topics related to the history of Missoula, Missoula County, and Fort Missoula at their convenience. These files are made up of duplicate or copied materials from the museum's collections and the University of Montana Mansfield Archives and have been organized by topic. The Public Research Files can be used without prior appointments during the museum's regular hours of operation in the Research Room on the first floor of the Main Museum Building. Researchers can request materials from these files by contacting the Curator of Collections. It is the responsibility of the Collections department to maintain and update the Public Research Files as staff time and resources permit.

#### **d. Photography**

Photography in the galleries is permitted if visitors do not use their flash when photographing the objects. All visitors are asked to tag or credit HMFM in their photographs if they are being posted online.

All professional photographers wishing to use collections objects or museum exhibitions as backdrops for a photoshoot must get written permission from the Curator of Collections at least one week in advance. Fees may apply.

#### **e. Licensing and Reproductions**

Photographic images held and maintained in the Permanent Collections of the Historical Museum at Fort Missoula are the property of the museum. The museum does allow for other entities to request licensing or reproduction rights to these materials.

- i. Organizations and individuals may request to use materials within the collection and these requests will be approved on a case-by-case basis.
- ii. All requests must be submitted in writing to be approved by the Curator of Collections or Executive Director when appropriate.
  1. See Appendix 16 for sample HMFM Non-Exclusive Rights and Reproduction Agreement Form
- iii. Some fees may apply to licensing and reproduction requests. These fees can be found on HMFM's website and on the reverse of the Rights and Reproduction Agreement Form.
  1. The Curator reserves the right to waive these fees based on intended use and requestor.
  2. These funds will be added to the "Donation to Collections" fund in the Friends of the Museum accounting structure to be used on collections care.
- iv. Additional conditions and stipulations (found on the back of the agreement form) relating to these requests must be agreed to prior to the approval and completion of the request.
- v. The Curator is responsible for maintaining records of all reproduction requests to track usage and interest in HMFM's permanent collections.

#### **f. Intellectual Property Rights**

As a cultural institution which holds and maintains collections in the public trust, 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 protected.

The Curator of Collections is responsible for determining the Intellectual Property Rights status of items within the collections. Any applicable restrictions on use shall be clearly indicated within the collections records and accession files by the Curator.

**The Museum agrees to:**

- i. Manage its own collections and those in its custody in accordance with applicable copyright laws.
- ii. 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.
- iii. Consult collection records 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,



# **HISTORICAL MUSEUM AT FORT MISSOULA**

## **COLLECTIONS MANAGEMENT POLICY**

### **APPENDICES**



## EMERGENCY RESPONSE PLAN

### Responding to Mass Trauma Events in our Community

A “mass trauma event” is defined as an event that affects an entire community of people in some sort of traumatic or negative way. An example of these events would include (but are not limited to): mass shootings, wars, political violence, acts of terrorism, pandemics, and natural disasters.

If a mass trauma event occurs in the community of Missoula, a need might arise to preserve the history of that event as it happens. The role of the Historical Museum at Fort Missoula (IIMFM) and the support our organization can provide during these events are significant, and we should be prepared to aid our community in the best way that we can.

**A. In terms of collecting items related to the mass trauma event,** HMFM staff and board members must ask themselves the following questions to determine the role of our institution:

1. Does the process of collecting items related to this event fit the mission of our institution?
2. Are we the right institution to be collecting items related to this event or do we know of other organizations better suited to house and display them?
3. Do we have the resources (time, money, supplies, staffing) the process will require?
4. Can we keep our staff, existing collections, and institution healthy and safe during this process? (In particular, how will we deal with the mental health needs of the collecting staff?)
5. What permissions do we need to begin the collecting process?
6. What will we collect and how much of it? (For example, if we were to collect only 15 of the most important items from this event, what would they be?)
7. How will these items be used by our institution?

*If we answered “no” to any of the questions #1-4,* HMFM will not collect items related to the mass trauma event.

*If we answered “yes” to all of the questions #1-4,* HMFM’s Curator of Collections will begin writing initial plans for how the collecting process will begin and coordinate how collections staff and volunteers will proceed with the process (keeping in mind the answers to



questions #5-7). The items collected will be accessioned into the Museum's Permanent Collections and will be used in exhibitions and programming related to this event when appropriate.

**B. In terms of creating programming or events related to the mass trauma event, HMFM staff and board members must ask themselves the following questions to determine the role of our institution to host these programs and events:**

1. Are there any other organizations that are creating programming and events in response to this mass trauma event?
  - a. If there is – There may not be a reason or a need to start our own programs and events. Staff and board should ask themselves: Would it be appropriate or possible to partner with these organizations to show our support?
  - b. If there is not – Continue answering the following questions.
2. What would be the most appropriate way for the museum to get involved in responding to this mass trauma event?
3. Would the creation of programs or events related to the event fit the mission of our institution?
4. Do we have the resources (time, money, supplies, staffing) that these programs or events may require?
5. Are there any permissions that we would need to receive to host any programs or events related to the event?

***Examples of the kinds of programs and events that HMFM might provide in response to a mass trauma event include but are not limited to:***

- Temporary exhibits in museum gallery space
- Pop up exhibits in gallery spaces in other parts of the community (if available)
- Online exhibits or memorials
- Private interviews and oral history collection
- Creation of “safe places” like community gatherings/forums for the public to congregate and interact with others who were impacted by the mass trauma event

***Please note:*** Not all of these programs and events apply to all mass trauma events and should be chosen based on how they best respond to the current situation. Consideration must also be given to museum resources when deciding which of these things to do and/or how many of them to do. HMFM is not required to host any of these things themselves in response to a community emergency.

*If HMFm staff and board decide to host one (or more) of these programs and events, the Education Director will coordinate the planning and implementation efforts. The Director will then involve other museum staff as the program or event requires.*

**C. In terms of providing support to community members in the aftermath of the mass trauma event, HMFm staff must ask themselves the following questions to determine their role as delegates of our institution:**

1. What kinds of support can our staff provide to those who are coping with the aftermath of the mass trauma event? (For example, providing a private space for people to share their stories and experiences of the event)
2. Can we keep our staff healthy and safe during this process? (In particular, will efforts in this regard affect the mental health of our institution's staff members?)
3. How will HMFm provide information to the public about the support that we can provide? (Social media efforts, posting on our website, writing press releases, etc.)
4. How will HMFm turn away members of the community if they ask for support that we cannot provide?

Not all mass trauma events will be the same or require the same support from our organization, so these questions should be asked every time one occurs. *HMFm staff will use these questions to create a list of services that they will provide to the community after the event, which will then be made public.* The Assistant Director will work with the rest of the staff to coordinate the planning and implementation of these services and involve specific museum staff and volunteers as required.

*HMFm's Assistant Director will create a list of resources and institutions that can also provide support to members of the community and will distribute that list if we are not able to provide the support that is requested of us.* This list may change depending on the event, but a basic list can be created and updated based on each particular situation.



## EDUCATION COLLECTION – DONATION RECEIPT

### Donor Information

Name(s): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

**I hereby give, convey, and transfer absolutely the objects listed below to the Historical Museum at Fort Missoula, together with all copyright and associated rights:**

Description and Number of Objects

**I understand that these items will become part of the Education Collection and will be used and handled regularly during educational programs, field trips, and events. I acknowledge that the museum holds the right to decide on appropriate disposal of said item. I relinquish all items listed on this form and certify that the Historical Museum at Fort Missoula holds free and clear title to them.**

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

Accepted for HMFM by: \_\_\_\_\_ Date: \_\_\_\_\_

### TRANSFER OF TITLE

**The Historical Museum at Fort Missoula hereby gives and donates without limiting conditions the item(s) listed on this document that have been deaccessioned from the Permanent Collection to:**

Name of organization/collection: \_\_\_\_\_

Contact person, Title: \_\_\_\_\_

Phone number/email for contact person: \_\_\_\_\_

**Object(s) being transferred:**

Object ID #	Description of item

**The Historical Museum at Fort Missoula is the absolute owner of the object(s) listed above and has the right to make this donation.**

Transfer approved by:

Object(s) accepted by:

\_\_\_\_\_  
Emma Sieh, Curator of Collections

\_\_\_\_\_  
Signature of transfer recipient

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Objects delivered to transfer recipient: \_\_\_\_\_ (Date)



Purchase Date: \_\_\_\_\_

Arrival Date: \_\_\_\_\_

## RECORD OF PURCHASE

### Purchase Information

Purchased From: \_\_\_\_\_

Contact Information (email or phone number): \_\_\_\_\_

How did we find out about this item?: \_\_\_\_\_

Contact information (email or phone number): \_\_\_\_\_

Amount Paid: \_\_\_\_\_ Form of Payment: \_\_\_\_\_

Purchase Date: \_\_\_\_\_ Initials: \_\_\_\_\_ Arrival Date: \_\_\_\_\_ Initials: \_\_\_\_\_

<b>Description and Number of Objects</b>
<b>Provenance and Background Information</b>
<b>Reason for Purchase</b>

The above object(s) have been purchased by HMFM's Collections Department and the Museum holds free and clear title to them. The object(s) can be used at the discretion of HMFM.

Approved by HMFM staff: \_\_\_\_\_

Date: \_\_\_\_\_

**DEED OF GIFT**

Accession#

Donor:	_____		
Address:	_____		
City:	_____	State: _____	Zip: _____
Phone H/C:	_____	Email: _____	_____

The Donor hereby irrevocably and unconditionally gives, transfers, and assigns to the HISTORICAL MUSEUM AT FORT MISSOULA (HMFM) 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 for use and disposition by HMFM. The Donor warrants that to the best of their knowledge that the Donor has the full power and authority to transfer the object(s) to HMFM, including all associated copyright and trademarks. Donor certifies that to the best of the Donor's knowledge, the object(s) has not been exported from its country of origin in violation of the Laws of that country in effect at the time of the export, nor imported into the United States in violation of United States laws and treaties.

Limited gallery space and the policy of changing exhibitions do not allow the Museum to guarantee the permanent exhibition of any objects. 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 or otherwise disposed of in accordance with the Museum's Collection Management Policies and Procedures.

**Description of Gift:**

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

\_\_\_\_\_  
Signature of Donor/agent

\_\_\_\_\_  
Date

Received for the museum by:

\_\_\_\_\_  
Emma Sieh, Curator of Collections

\_\_\_\_\_  
Date of Receipt of Deed

**THE GIFT DESCRIBED ABOVE IS ACCEPTED FOR THE HISTORICAL MUSEUM AT FORT MISSOULA**





## TERMS & CONDITIONS

- 1) By filling out this form, the Donor has requested that the Museum accept the object(s) on the reverse side of this Receipt.
- 2) The object(s) listed on the reverse side of this Receipt is/are the clear property of the Donor and no else else holds claim to the title for it/them.
- 3) Unless otherwise agreed to in writing by the Donor, the Museum will exercise the same care for the offered objects as it does in the safekeeping of comparable items in its own collection.
- 4) Attributions, dates, and other provenance information will not be considered official opinions by the Museum. Valuations on this form are those of the Donor's opinion.
- 5) Objects may be photographed by the Museum for its own purposes, but photographs will not be published without the written permission of the Donor. All citation information will include the Donor name if applicable.
- 6) Objects may be examined using non-invasive methods but the museum will not clean, restore, or otherwise alter the object(s) without the written consent of the Donor.
- 7) In receiving imported objects, archaeological artifacts, or natural history specimens, the Museum requires the Donor to comply with all government regulations.
- 8) If the Donor has knowledge of special conditions pertaining to the object(s), such as copyrights or lien, they should inform the Museum immediately.
- 9) The Museum may express its intent to return the offered property by written notice directed to the Donor. Once an acquisition decision has been reached, the Museum will notify the Donor on three separate occasions. The Museum assumes no responsibility to search for the Donor if they are not located at the address on the back of this form. If after 180 days from the rejection date the object(s) has not been claimed, then the object(s) will be deemed an unrestricted gift to the Museum.
- 10) The Donor hereby releases the Museum of all liability with respect to loss or damage of the object(s) while in its possession or in transit.

**I have read the Terms and Conditions on this form and I certify that I agree to the terms of the donation of objects to HMFM.**

Donor: \_\_\_\_\_ Date: \_\_\_\_\_

Received for the Museum by: \_\_\_\_\_ Date: \_\_\_\_\_

[Please print]





## LOAN CONDITION REPORT

### Item Information:

<Catalog Information pulled from PastPerfect>  
<Object name, description, size, accession number>  
<Insert Photo of Object – if applicable>

### Exhibition Information:

<Name of Exhibition>  
<Exhibition Venue>  
<Dates of Exhibition>

**Dates of Loan:** \_\_\_\_\_

### Original Condition:

<Condition notes from PastPerfect and physical examination prior to loan>

### Incoming Condition:

<Left blank, to be filled out by Borrowing Institution>

**Examined by / Date:** \_\_\_\_\_

### Outgoing Condition:

<Left blank, to be filled out by Borrowing Institution>

**Examined by / Date:** \_\_\_\_\_



3400 Captain Rawn Way  
Missoula, Montana 59804  
406-258-3472

## Outgoing Loan Extension Agreement

The Historical Museum at Fort Missoula has agreed to extend the terms of its current Outgoing Loan Agreement with \_\_\_\_\_ (borrowing institution name) originally signed by \_\_\_\_\_ (contact name). The dates of the loan shall be extended for \_\_\_\_\_ until \_\_\_\_\_ (new end date). If an additional extension is required, it must be agreed upon in writing with a new extension agreement.

.....

**The borrower accepts the terms stated in this extension agreement.**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

**This extension agreement was approved for HMFM by:**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_



3400 Captain Rawn Way  
Missoula, Montana 59804  
406-258-3472

**Incoming Loan  
Extension Agreement**

\_\_\_\_\_ (lender name) has agreed to extend the terms of its current Incoming Loan Agreement with the Historical Museum at Fort Missoula originally coordinated by Emma Sieh, Curator of Collections for the following purpose \_\_\_\_\_. The dates of the loan shall be extended for \_\_\_\_\_ until \_\_\_\_\_ (new end date). If an additional extension is required, it must be agreed upon in writing with a new extension agreement.

.....

**The lender accepts the terms stated in this extension agreement.**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

**This extension agreement was arranged for HMFM by:**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_



Historical Museum at Fort Missoula  
 3400 Captain Rawn Way Missoula, MT 59804  
 406-258-3476

APPENDIX 10

Loan #: \_\_\_\_\_  
 Received Date: \_\_\_\_\_  
 Return Date: \_\_\_\_\_

## INCOMING LOAN AGREEMENT

**Lender Information**

Name(s): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Best way to contact the Lender:  Phone  Email

**The object(s) listed below are subject to the Terms and Conditions printed on the reverse side of this form:**

Description and Number of Objects	Condition

\*Date of Loan Period: \_\_\_\_\_

Credit Line (for exhibition label):  
 \_\_\_\_\_

Value (if known): \_\_\_\_\_

\*Is this loan being used for an exhibit?  Yes  No

If so, which exhibit: \_\_\_\_\_

*Flip to reverse side for signature →*

## TERMS & CONDITIONS

All invited loans to HMFM are accepted in accordance with the statement of facts and conditions set forth on this Loan Agreement Form.

### Care and Handling

- 1) HMFM will exercise the same care of the loaned property as it does in the safekeeping of its own property.
- 2) It is understood that HMFM will not clean, restore, or otherwise alter the item(s) listed without the written consent of the owner or his/her agent.
- 3) The condition of the objects listed on this agreement has been certified by the Lender. Evidence of damage to the object while in HMFM's custody will be reported immediately to the Lender.

### Insurance

- 1) The Lender may elect to maintain insurance coverage over the materials throughout the course of the loan and said insurance must be arranged, approved, and executed in writing by an authorized representative of HMFM and owner before loss. HMFM must be presented with a certificate of insurance naming the museum as an additional insured entity.
- 2) If the Lender does not express their desire to maintain coverage, objects listed on the reverse will be covered under the HMFM wall-to-wall Fine Arts Policy. Such insurance shall cover only those risks against which HMFM generally insures its own property under such policy. With the exception of those items explicitly insured under policies of insurance covering HMFM, the owner or his/her

agent shall indemnify and hold HMFM and its respective employees, harmless against all losses or claims associated with the item(s) including without limitation, theft or damage to the item(s).

- 3) The value(s) shown is (are) the amount(s) agreed upon by HMFM and the owner before loss for insurance purposes only. They are not considered to be an appraisal by HMFM.

### Reproduction and Credit

- 1) Unless HMFM is notified in writing to the contrary, the item(s) listed may be photographed and reproduced for record, insurance, publicity, and exhibition purposes.
- 2) Terms used for the description of the item(s) listed are for identification only and do not constitute an expression of opinion on the part of the museum staff.
- 3) Unless otherwise instructed in writing, the Museum will give credit to the Lender in any labels and publications as specified on the face of this agreement.

### Loan Period and Extension

- 1) HMFM may request to extend the loan at any time. Loan extensions must be agreed to in writing at least one week prior to the original return date. The terms of this agreement apply to any extension of the original loan.
- 2) HMFM requires written notice of the owner or of his/her authorized agent for the withdrawal or any item(s) listed on this receipt. Item(s) deposited for the inclusion in an exhibition may not be withdrawn during the period of that exhibition without a signed agreement with the Curator.

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

Lender signature: \_\_\_\_\_

Date: \_\_\_\_\_

HMFM Staff: \_\_\_\_\_

Date: \_\_\_\_\_



Historical Museum at Fort Missoula  
 3400 Captain Rawn Way Missoula, MT 59804  
 406-258-3472

APPENDIX 11

Loan #: \_\_\_\_\_

Date: \_\_\_\_\_

Date Returned: \_\_\_\_\_

### OUTGOING LOAN AGREEMENT

**BORROWER:**

Institution: \_\_\_\_\_ Contact Name(s): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

**PURPOSE:**

The following purpose for this loan has been agreed upon both by the Lender (HMFM) and the Borrower:

\_\_\_\_\_

Dates of Loan: \_\_\_\_\_ Dates of Exhibition/Project: \_\_\_\_\_

**INSURANCE:**

( ) Insurance to be waived ( ) Insurance to be provided by the Borrower

Value: \_\_\_\_\_

**SHIPPING AND OTHER HANDLING INSTRUCTIONS:**

\_\_\_\_\_

\_\_\_\_\_

**OBJECT INFORMATION:**

HMFM agrees, subject to the conditions on the reverse of this Outgoing Loan Agreement Form, to lend the object(s) listed below (Object Name/Medium/Size/Credit Line/Accession #):

CONDITION: \*See attachment for details\*



## TERMS & CONDITIONS

### GENERAL

1. The Borrower agrees to incur all expenses relating to this loan unless otherwise noted.
2. If the loaned material is to be displayed, HMFM shall be credited for all materials furnished as part of this loan. The credit line should read as follows:  
*From the collections of the Historical Museum at Fort Missoula*
3. HMFM is not responsible for the quality of the display or final interpretation placed on objects.
4. The duration of the loan must be stated by the Borrower at the time of the loan request. Objects must be returned to HMFM at the end of the loan period unless an extension has previously been requested and approved in writing by HMFM.

### CARE AND HANDLING

1. Items listed on this form shall remain in the condition in which they are received unless otherwise stipulated in this agreement. Items shall not be cleaned, repaired, retouched, or altered in any way without the express written permission from HMFM. All damage must be reported to HMFM immediately.
2. Objects will be handled with care and by qualified personnel only.
3. Objects will be stored during exhibition preparation and exhibited under the same security and climate conditions required by HMFM.

### INSURANCE

1. Each object shall be insured at the Borrower's expense under a "wall-to-wall" policy against all risks of physical loss or damage from any external cause while in transit and on location during the period of the loan unless this agreement indicates the insurance requirement has been waived.
2. Required insurance shall be arranged and agreed to by either the Borrower or HMFM before any objects covered by this agreement may be removed from the museum.
3. Upon request, the Borrower shall supply HMFM, before shipment, a certificate of insurance in conformance with the foregoing terms.

### PHOTOGRAPHY AND COPYRIGHT RESTRICTIONS

1. The Borrower may photograph the objects only for record and publicity purposes. This includes condition reports, documentation, damage, educational programming, and marketing materials.
2. The Borrower may not reproduce any of the objects (including photography of the objects) for purpose of sale.
3. The Borrower shall provide HMFM with a copy, at no cost, of any publication or report created for the objects listed on the reverse of this form.

---

### AGREEMENT

The Borrower acknowledges that they have read the information and conditions of this loan and accepts them.

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Loan approved for HMFM by:

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

<Letter\_date>

<Address\_name>

<Address1>

<Address2>

<City>, <State> <Zip>

Dear <name>:

On behalf of the Historical Museum at Fort Missoula, I am pleased to announce that your recent loan request to use <object name and quantity> in your upcoming exhibition, <exhibition name>, has been approved for the submitted dates, <exhibition dates>.

Enclosed, you will find two copies of our Outgoing Loan Agreement form for you to complete and sign. Once you have signed both copies, return them in the enclosed envelope. I will countersign the forms and return one to you for your records. You will also find a copy of HMFMs Condition Report that will need to be completed upon arrival of the loaned objects.

Please feel free to contact me if you have any questions or concerns during this process.

Sincerely,



Emma Sieh  
Curator  
406-258-3472



## Incoming Loan - Return Receipt

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: \_\_\_\_\_  
(HMFM)

Owner: \_\_\_\_\_  
(signature)

DATE: \_\_\_\_\_

**DEACCESSION RECOMMENDATION**

The Curator of Collections has officially recommended that the following artifact be formally deaccessioned from the Permanent Collections at the Historical Museum at Fort Missoula:

<b>Object ID:</b>	
<b>Brief description of item:</b>	
<b>Clarity of Title:</b>	
<b>Estimation of value of item:</b>	
<b>Reason for deaccession:</b>	
<b>Suggested disposal method:</b>	

This recommendation has been reviewed by leadership at the Historical Museum at Fort Missoula including the Executive Director, the Friends of the Historical Museum Board, and the Board of Trustees and the following decision has been made:

**DEACCESSION RECOMMENDATION APPROVED:**

Signature of Executive Director:	Date:
Signature of Friends Board Representative:	Date:
Signature of Board of Trustees Representative:	Date:
Signature of Curator of Collections:	Date:

**DEACCESSION RECOMMENDATION REJECTED:**

Signature of Executive Director:	Date:
Signature of Friends Board Representative:	Date:
Signature of Board of Trustees Representative:	Date:
Signature of Curator of Collections:	Date:

**Reason for rejection:**

**Date for reassessment:**

## Historical Museum at Fort Missoula Collections Care Guidelines

**The preventative conservation and care of collections objects is an essential function of the ongoing work of the Museum. Because 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 principles.**

### GENERAL RULES

*The following are general guidelines for staff, volunteers, and interns within the Collections Department at HMFMM must follow when working with artifacts in the permanent collections. This guide provides a basis of best practices of museum collections care and should accompany the training provided by the Curator of Collections.*

### Handling Collections

- No food, drinks, or smoking in storage or gallery areas.
- Wash your hands before handling objects, even when planning to wear gloves.
- Be sure gloves are clean and discard dirty gloves.
- Be mindful of loose clothing and jewelry that might cause damage to the objects.
- Store objects of similar size and weight together whenever possible.

### Moving Collections

- Inspect an object for existing damages before moving it.
- Be sure to report damage of an object to the Collections Staff immediately.
- Decide where an object is to be moved first and have a space prepared for it.
- When transporting artifacts, move slowly and deliberately.
- Handle, move, or carry only one object at a time using both hands.
- Ask for assistance if an object seems too heavy or unwieldy to carry.

---

### BY MATERIAL TYPE

*The following are the best practices that should be followed when handling and working with collections artifacts of different material types. For specific questions not covered in this basic outline, staff, volunteers, and interns should ask the Curator of Collections for further clarification and training.*

### Three-Dimensional Objects

- Do not use gloves on objects that are too smooth or slick.
- Wear nitrile gloves when handling metal objects; fingerprints can leave dirt and oil that will eat into the metal.
- When an object is being used for display, do not discard packing materials as it will need them when it is packed again.
- Keep track of all removable pieces of an object when handling it to ensure no damage or loss of pieces.
- Even if an item seems sturdy, use care when handling it.

### Paper and Archival Materials

- Keep hands very clean when working with paper and archival materials.
- Make sure work surfaces are clean before placing any paper or archival materials on them.
- Use care when handling paper materials as they are fragile.
- Do not bend, staple, tape, or paperclip archival materials.
- Unfold or flatten papers whenever possible to avoid causing further damage to the item.
- Loose works on paper should be separated with proper interleaving paper.
- Isolate all newsprint because it is highly acidic and will stain the adjacent paper.
- If you need to place identifying information on the object itself, use a No. 2 pencil.
- Avoid leaving paper and archival materials in direct light as they will fade over time.

### Photographs

- Wear nitrile gloves when handling photographs.
- Handle prints and negatives along the edges.
- Remove any extraneous materials on the photographs (paper clips, rubber bands, old clippings, notes, etc.)
- Handle curled or rolled photographs very carefully as they can crack.
- Do not stack materials if possible.
- Remove photographs from frames whenever possible.

### Textiles

- Keep hands and any surfaces that the textile might touch very clean.
- Cotton or nitrile gloves should be worn while handling textiles, but do not use gloves that have previously touched other items.
- Remove jewelry that might snag on the textiles while handling them.

- If a textile surface needs to be lightly cleaned, gently vacuum it on the lowest suction. Any further cleaning should be assessed by a conservator.
- If possible, identification information should be placed on the storage container so textiles that are not unwrapped and handled needlessly.
- Sew-on cotton tapes can generally be used safely as identification labels.
- Avoid folding large textiles as they may create permanent damage in the creases – instead, try to roll and wrap the textiles on archival tubes.
- Avoid leaving textiles in direct light as it will fade the dye.

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## PRESERVATION AND CONSERVATION

*The following are guidelines to be followed regarding preservation and conservation efforts for artifacts within the permanent collections. All work done to preserve and conserve the collections must be approved and performed by the Curator of Collections or well-trained collections staff.*

- All collections activities conducted by staff, volunteers, and interns shall follow the simple edict of “***Do No Harm.***” This means our work must:
  - Provide environmental conditions that minimize harm to the artifact
  - Be conducted by trained personnel working within the department
  - Utilize approved materials for storage, packing, and exhibiting collections material
  - Be reversible
- The environmental conditions of areas housing museum collections (both in exhibit galleries and in storage spaces) will be monitored by the Curator of Collections in **weekly inspections**. This includes things like **light, temperature, relative humidity, and pest activity**.
  - Changes in the ambient environment in these spaces should immediately be brought to the attention of the Curator of Collections who will rectify the situation promptly.
  - The Museum has engaged in a contract with Orkin to provide pest management services to the buildings throughout the site. The Curator can work with the Assistant Director to manage any pest issues that might arise onsite.
- The condition of individual collections items will be monitored and tracked through formal condition reports conducted by the Curator of Collections. Reports and their associated photographs create a baseline record from which the condition of collections objects can be monitored to show change and identify pertinent agents of deterioration.
  - These reports will be conducted on items such as:
    - Objects with damage issues requiring conservation treatment
    - Objects on loan or in temporary custody
    - Objects on display

- Condition reports will be saved as part of the object's record in the museum's collections database system, PastPerfect 5.
  - The condition of individual collections items should be updated whenever the item is moved from its storage location or handled.
  - Damage or drastic changes in an object's condition should immediately be brought to the attention of the Curator of Collections.
  - Some of the historic buildings and structures on the Museum's campus are also part of the Museum's permanent collections. This means they should be afforded the same care and attention to preservation as the smaller objects in our storage areas. HMFM is committed to preserving these structures to their "original state".
    - See the Building and Grounds Plan for the definition of "original state," the categorization of the buildings on the grounds, and project plans identified by the Building and Grounds Committee.
  - While there are some things that can be done onsite to improve the housing and environmental conditions for individual artifacts, all major conservation treatments should only be completed by a professional conservator.
    - Only the Curator of Collections can make decisions related to the preservation and conservation treatments for collections materials
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## SECURITY FOR COLLECTIONS

*HMFM is committed to ensure the safety and security of its collections both in storage and in exhibitions. The following procedures are in place to protect the collections from theft and damage:*

1. Security Alarm System - The Museum contracts with a security provider for intruder alerts for all the historic structures on our campus. These alarms are activated at the end of each business day. Alarm systems in collections storage areas (such as the Warehouse and the Barracks) are activated at all times unless staff or volunteers are currently at work in the buildings. Alarm codes are never given out to unauthorized personnel.
  - a. This system also provides fire alerts for all historic structures on our campus. The alarms for this fire system are active 24/7.
2. Keys – All Museum staff have master keys that allow them to enter all areas. Collections storage spaces are kept locked and secured at all times unless staff or volunteers are currently at work in them. It is the responsibility of the Curator of Collections to provide master keys to trained collections volunteers as needed.

# HMFM

Historical Museum at Fort Missoula

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