



**JAMES MONROE MUSEUM AND MEMORIAL LIBRARY
COLLECTIONS MANAGEMENT POLICY**
Adopted by the Board of Visitors of the University of Mary Washington 1 October 1988
Revised 19 December 2013

NOTE: It is the intention of the staff and boards of the James Monroe Museum and Memorial Library that this Collections Management Policy be in accordance with the American Alliance of Museum's (AAM) *Code of Ethics for Museums* (1994), as amended, along with recommendations made in the Institute of Museum Services (IMS)-supported survey programs, including the Museum Assessment Program (MAP I, 1990); the Conservation Assessment Program (CAP, 1993); and MAP II (1994).

I. MUSEUM MISSION STATEMENT

The James Monroe Museum and Memorial Library is dedicated to the study, interpretation, and presentation of the life and times of the fifth President of the United States. Its mission is also to trace the social, political, and intellectual influence of James Monroe and to present it within the context of his life through exhibitions, publications, scholarly presentations, community events, and educational programs. As an administrative unit of the University of Mary Washington (UMW), the Museum contributes to a superior educational environment by serving as a cultural and professional resource for students, faculty, and staff. Reflecting the University's mission and the personal values of James Monroe, the Museum supports adaptive learning, personal achievement, responsible leadership, service to others, and engaged citizenship in a global and diverse society.

Approved by the University of Mary Washington Board of Visitors, January 23, 2013

II. COLLECTIONS MANAGEMENT POLICY

This Collections Management Policy shall apply to all of the Museum's collections including, but not limited to, the library, exhibits, archives, artifacts, storage facilities, and physical structures.

III. GOVERNANCE AND ADMINISTRATION OF THE MUSEUM

A. The Board of Visitors (BOV) of the University of Mary Washington is the Museum's governing authority. The BOV is advised by a Board of Regents (BOR) appointed by the Governor of Virginia from lists of nominees submitted by the University and by the James Monroe Memorial Foundation.

B. The Museum Director is directly supervised by the Dean of the College of Arts and Sciences, and reports to the University Provost, President, and Board of Visitors as appropriate.

IV. CURATORIAL RECORDS OF THE COLLECTIONS

A. The management of the collections requires thorough and well-maintained records; the Curator shall be responsible for maintaining up-to-date accession records, catalogue records, and an inventory of all items in the collections.

B. The Curator shall be responsible for maintaining an up-to-date inventory of all artifact loans, incoming or outgoing.

V. ACQUISITIONS

A. The Museum shall have a policy of selective acquisition. Because of space and monetary limitations, it is neither feasible nor ethical for the Museum to allow indiscriminate growth of its collections. Priority shall be reserved for items that can be proven to be related to the immediate Monroe family. Objects relating generally to the life, times and influences of James Monroe, to descendants, or to noteworthy historical figures (whose inclusion would further promote the Museum's mission) will be considered on an individual basis according to space, condition, and relationship to the Museum's mission.

B. Any object acquired for the Museum shall meet the following conditions:

1. Collecting Objectives: the Curator shall determine the types and classes of objects to be collected and stay within those parameters when possible. For example: until the Museum's storage facilities can be updated and enlarged, there should be no collecting of oversized furniture. Also, only books and papers directly relating to Monroe's life and times should be acquired until an archivist/librarian is hired to manage those collections.
2. The Museum can provide adequate storage, security, and on-going conservation of the object.
3. The historical significance of the object is well-documented.

C. The Museum acquires an object in the following manner:

1. The object is presented to the Curator for review. On behalf of the Museum the Curator may receive objects offered to the Museum for a period not to exceed thirty (30) days, to allow for a "Curatorial Review." If appropriate, the Curator will then recommend to the Board of Regents or its Executive Committee, and then to the Board of Visitors, that the object be accepted into the collection. This process will utilize the Museum's "Curatorial Review" form (which must be signed by the owner or owner's agent, the Curator, and a witness).
2. The Curator recommends acquisition of the object(s).

3. The Board of Regents or its Executive Committee may accept or reject an object only after it is reviewed and approved by the Curator. Irrespective of the Board of Regents' action regarding the object, the donation shall be presented to the Board of Visitors for consideration. Finally, the object must be accepted by the Board of Visitors.

4. The Museum's ownership shall be free and clear, without restriction as to use and future disposition. Objects offered with restrictions may only be considered for temporary loans.

5. Artifacts purchased by the Museum must meet the same collecting criteria as those applied to donations, and must be purchased at fair market value as determined between the parties.

6. A select group of items may be accepted into the collection with the understanding that these pieces will be used for educational purposes such as "study collections," "hands-on" collections, or objects used only for special tours (sight or hearing impaired). Reproductions, duplicates, and items without provenance will receive a different accession number, to show that they are only in the collection on a temporary or study basis (i.e. T-JM94.1, or SC-JM94.1).

D. Objects may be acquired through purchase, bequest, gift, loan, exchange, or abandonment. In the context of this policy, abandonment is defined as an object previously loaned to the Museum that was not reclaimed at the conclusion of the loan term, or is present because the lender is no longer accessible. Abandoned objects may be added to the Museum's collection in accordance with the provisions of 55-210.31-38 of the Code of Virginia.

E. No object shall knowingly be accepted or acquired for the Museum's collections if it is known to be stolen property, to have been illegally imported into the United States, or to have been otherwise collected illegally.

F. No Museum staff person or volunteer, member of the Board of Regents, member of the Board of Visitors, or employee of the University of Mary Washington may compete with the Museum for acquisition of an artifact. To prevent a conflict of interest, any such person offered or considering acquisition of an item which might be desired for the Museum's collection shall first offer the Museum, in writing, the option to acquire the item at the same cost or arrangement under which he or she is considering it. Only if the Museum Director states, in writing, that the Museum is not interested in securing the object, shall the individual be able to acquire it.

F. Permanent Accession Files, containing all legal instruments and conveyances, shall be maintained in the Museum; copies shall be placed under the care of the Center for Historic Preservation at the University of Mary Washington.

G. A catalogue entry or other appropriate catalogue file shall be created for an object within thirty days of its acceptance by the Museum. During this thirty-day period an adequate permanent storage site must also be secured.

VI. APPRAISALS

A. No member of the Museum staff, Board of Visitors, or Board of Regents shall appraise, or offer to appraise, the monetary value of any object within the collection, or of any item or items being offered for the collection.

B. Donors desiring to have an appraised value for income tax or any other purpose shall obtain that appraisal on their own.

C. If a donor desires a value to be stated on the Deed of Gift, he or she shall present a written appraisal to the Curator. This appraisal shall be cited as the source of the valuation on the Deed of Gift with accompanying paperwork placed in the object file.

D. Objects shall not be left in the care of the Museum while a donor arranges for an appraisal.

VII. DEACCESSIONING

A. Deaccessioning is the process of removing permanently from the Museum's collection previously accessioned objects. In general, it is the intention of the Museum to retain ownership of its collections in perpetuity; however, there are sometimes valid reasons for deaccessioning an object. The deaccession process must be cautious and deliberate. Written documentation is necessary for all phases of the deaccession process.

B. Objects to be considered for deaccession must meet at least one of the following criteria:

1. The object is irrelevant to the purpose of the Museum, or it is outside the scope of the Museum's acquisition policy.
2. The object has failed to retain its identity or authenticity. When research can prove beyond all reasonable doubt that the piece is not authentic, the Curator will submit documentation to the Board of Regents or its Executive Committee, and then the Board of Visitors, for approval to dispose of the piece through barter with another institution or sale through a public auction.
3. The object has been lost or stolen for a period of three years or longer.
4. The item is a duplicate and not considered sturdy or secure enough to be used in the "study collection."
5. The object has deteriorated to the extent that conservation treatment is not feasible.
6. The object becomes hazardous to the Museum personnel or property.

C. Before an object is recommended for deaccessioning all reasonable efforts shall be made to ascertain that the Museum is able to do so legally. Where restrictions are found, the following procedures shall be utilized:

1. Mandatory conditions shall be strictly observed unless deviation from their terms is authorized by a court of competent jurisdiction.
2. Legal counsel will be sought if any questions arise as to the intent or the focus of any restrictions.

D. The following procedure will be adhered to in deaccessioning an object:

1. The Curator shall inform the Board of Regents in writing when it becomes necessary to deaccession an item. Proper documentation is vital throughout the deaccessioning process, and copies of all paperwork will be placed in the Museum's permanent files.
3. The Board of Regents or its Executive Committee may approve or disapprove of the Curator's recommendation for deaccessioning the object. Final action on the deaccessioning of an item will rest however with the Board of Visitors of the University of Mary Washington.

E. All proceeds resulting from the deaccession process shall be deposited into the Treasury of the Commonwealth of Virginia as restricted funds to be used only for the care and purchase of artifacts.

F. Employees of the Museum and of other UMW departments; volunteers; members of the Board of Regents and Board of Visitors; or their appointed agents, are prohibited from acquiring deaccessioned objects.

VIII. LOANS

A. Loans are temporary physical transfers of materials from one institution (or individual) to another, where there is no transfer of ownership.

B. Before any type of loan can be carried out, the loan arrangements must be recommended by the Curator to the Board of Regents or its Executive Committee, and must be approved by said board in writing.

C. Outgoing Loans for Exhibits/Study/Reproductions:

Outgoing loans shall be made to museums, institutions, historical societies, and galleries which adhere to the AAM *Code of Ethics for Museums* (1994), as amended. The loan period shall be made for up to one year in duration, with extensions made on an "as needed" basis, in writing, by the Curator at the request of the borrower, subject to approval by the Board of Regents or its Executive Committee, and by the Board of Visitors.

Loan extensions must be signed by representatives from both institutions. Loan requests from individuals will be addressed on an individual basis, and awarded when warranted by the Curator, and approved by the Board of Regents and the Board of Visitors.

Each outgoing loan shall be governed by a specific agreement applicable to the individual loan. In the absence of contrary provisions in such agreements, the following provisions will govern:

1. Objects shall not be altered in any way unless prior agreement is made and documented in writing.
2. Any stabilization work done on the object while on loan shall be agreed upon, in writing, beforehand by both parties. In the case of emergencies, verbal agreement can be accepted, with written documentation provided within ten (10) days. Facsimiles can be accepted as confirmations, though hard copies/originals are required to close the file.
3. No loans shall be made when an unreasonable risk to the safety of the object, Museum, or personnel is identified.
4. The borrower shall pay any packing and/or shipping costs for loaned artifacts. The main venue (i.e., the Museum) shall be responsible for shipping/handling charges when the object(s) are sent to other venues or returned to the lender.
5. The borrowing institution must carry adequate insurance coverage to handle the object from “wall to wall” (this includes the period of packing and shipping). The Museum requires a Certificate of Insurance from all institutions that borrow objects.
6. The borrowing institution must submit an AAM Standard Facility Report form documenting the institution’s storage, security, and gallery layouts to the Museum prior to the loan.
7. The outgoing loan forms shall be filled out, approved, and signed before the object leaves the Museum.
8. Publication of photographic images of the loaned piece(s) may be made for educational or publicity purposes; such publication shall be accompanied by a statement of the Museum’s ownership of the object.
9. Sales of photographic images of the loaned item(s), or production of a reproduction of that piece for sale or educational purposes, shall be permitted only under special arrangements made on an individual basis between the borrower and the Museum.
10. Unclaimed loan property: all borrowed items should be returned to the lender at the specified date, but if for some reason the lender does not respond to the inquiry regarding this return, the Museum will make every effort to contact a representative from the lending institution or individual. In the event that there is no response, the property will be placed in storage, at the lender’s expense, until further searches locate the lender.
11. Selected artifacts, images, documents, or publications may be considered for reproduction or adaptation for resale purposes.

D. Incoming Loans for Exhibit/Study:

The Museum agrees to treat any incoming loaned object as if it were the Museum's property. Each loan shall be governed by a specific agreement; in the absence of contrary provisions in such agreements, the following provisions will govern:

1. No alteration, restoration, or repair will be undertaken unless an emergency arises, and then only with written permission from the lender.
2. The loan period is for one year, or as agreed in writing by both parties. Extensions must be in writing and signed by representatives from both parties.
3. It is understood that the Museum has full right to display or store the loaned object in a place within the Museum that will not compromise its safety or integrity.
4. Adequate insurance coverage will be maintained through the Commonwealth of Virginia. Documentation will be made available upon request from the Purchasing office at the University of Mary Washington.
5. It is understood that the object may be photographed by the Museum for publicity or educational purposes while on loan. The piece may also be photographed by the general public (no flash) while on exhibition at the Museum.
6. The Museum will surrender the object only to a representative of the lending institution at the end of the loan period, unless otherwise stated in a written agreement.
7. No loans will be accepted when there exists unreasonable risk to the safety of the object, Museum, or personnel.
8. The Curator will be responsible for an up-to-date inventory of all loans, incoming or outgoing.
9. The Museum's Standard Facility Report form will be made available to the lender upon request.
10. Sale of photographic images of the loaned object or reproduction of the object shall be permitted only under special arrangements made in each case between the lender, the Museum and the organization proposing to make reproduction or photographic images for resale.

IX. COLLECTIONS ACCESS

The Museum encourages use of its collections for study and other appropriate purposes. Access to the Museum's collection by properly qualified individuals (carrying current identification) and/or institutions is provided by responding to written inquiries.

A. Access to the Museum's collections shall be arranged by written request to the Curator.

B. Researchers granted access to the collections will agree, in writing, to adhere to Museum policies and regulations governing usage. Failure to do so will lead to the immediate and permanent termination of special access to the collections.

C. The Museum will give due credit in publications, photographs and other reproductions and adaptations.

D. No exhibit/object or reproduction of an exhibit/object will be used in the promotion of a product or service for commercial purposes that imply the endorsement of said product or service by the Museum, the University of Mary Washington, or the Commonwealth of Virginia. It is understood that the general public may take photos of the exhibited collections for private use only.