

Collections Policy Manual

March 2010

Table of Contents

I.	Mission Statement	3
II.	Ownership of Collections	3
III.	Contracting	3
IV.	Description of Collection	3
V.	Collections Strategy	3
VI.	Role of Collections Committee	3
VII.	Accessions Policy	4
	Legal Restrictions to Accession	5
	Ethical Considerations of Accession	5
VIII.	Deaccession Policy	6
	Ethical Considerations of Deaccessioning	8
	Allocation of Proceeds	8
IX.	Study Collection	9
X.	Loans	9
	Incoming	9
	Outgoing	10
XI.	Collections Care and Documentation	11
	Handling	12
	Environment	12
	Lighting	12
	Inventories	12
	Conservation	12
	Integrated Pest Management	13
	Security	13
	Documentation and Record-keeping	13
	Insurance and Risk Management	14
	Off-site Storage	14
XII.	Access to Collections and Records	14
XIII.	Academic Partnership	14
XIV.	Rights and Reproduction and Publication of Collections	15
XV.	Review and Revision of Collections Management Policy	15
XVI.	Appendices	
	A: Oregon Administrative Rules, Chapter 571, Division 51	16
	B: Museum Mission and Strategic Planning document	21
	C: Collection Committee Position Charter	26
	D: JSMA Accession Procedures	28
	E: JSMA Code of Ethics	30
	F: JSMA Deaccession Procedures	40
	G: JSMA Incoming Loan Procedures	42
	H: State of Oregon Abandon Property Laws	44
	I: JSMA Outgoing Loan Procedures	46
	J: JSMA Art Handling Guidelines	47
	K: Exhibit A	59
	L: Research Application	60

Mission Statement

The Jordan Schnitzer Museum of Art enhances the University of Oregon's academic mission and furthers the appreciation and enjoyment of the visual arts for the general public.

Ownership of Collections

The collections of the Jordan Schnitzer Museum of Art (hereafter, "The Museum" or "JSMA") belong to the state of Oregon, being held in the public trust; their management is guided by Oregon Administrative Rules, Chapter 571, Division 51 (Appendix A).

Contracting

All legal contracts involving the Museum are with the state of Oregon acting by and through the State Board of Higher Education on behalf of the University of Oregon for the Jordan Schnitzer Museum of Art. Contracts are processed through University of Oregon Purchasing and Contracting Services. Only authorized personnel may sign contracts on behalf of the Museum.

The Museum strives to utilize the standard contract forms approved by Purchasing and Contracting Services for every transaction, such as Property Loan Agreements. When use of a standard contract is not possible, the contract is referred to Purchasing and Contracting Services for review and approval. All contracts that require Oregon Department of Justice approval are processed through Purchasing and Contracting Services.

Description of Collection

The Jordan Schnitzer Museum of Art (JSMA) is one of the premier Pacific Northwest visual art museums for exhibitions, programs, and collections of historic and contemporary art. The museum was recently expanded from 32,000 to approximately 76,000 square feet, with exhibition space increasing from 8,000 to 23,000 square feet. The collection numbers more than 13,000 objects, two-thirds of which is in Chinese, Japanese and Korean art, and includes a major collection of American and regional art. The Japanese collection has great depth in prints, textiles, scrolls and screens. The Chinese collection has strong decorative arts, textiles, ceramic and funerary objects. The Korean collection has outstanding paintings, screens and celadon ware. The Museum has the largest public collection of works by Morris Graves. In addition, the collection contains European prints and paintings and Latin American works in a range of media.

Collections Strategy

The Museum collects, preserves, studies, exhibits, and interprets works of art for the benefit of the University of Oregon curriculum and for the enrichment of the general public. The JSMA is dedicated to strengthening its Chinese, Japanese, Korean, American and Pacific Northwest art collections and to acquiring fine examples from the history of art, from earliest times to the present, representing cultures throughout the world (see Appendix B: Museum Mission and Strategic Planning).

Role of Collections Committee

The Collections Committee is an advisory committee to the Executive Director of the Museum. In addition to the Executive Director, Curators, and Collections Manager, the committee is comprised of members of the Leadership Council, University faculty, and others whose expertise

in art and the art world is beneficial to the Museum (see Appendix C: Collections Committee Position Charter).

Accessions Policy

The Museum actively considers objects for accession that support the Museum's mission and are of artistic merit, are of museum quality, have clear and legal title and satisfactory provenance, and that contribute to the Museum's collections development and programmatic objectives. The Museum will only accession objects with the intention of maintaining them in the collections. Accessions will be in stable, exhibitable condition, unless specifically acquired for another purpose or funds are identified and allocated for conservation and stabilization of the object. On occasion, the Museum will acquire objects that do not meet the criteria for accession but are useful for other purposes. The Museum department accepting objects that are not formally accessioned is responsible for their care and safety, including maintaining an inventory of its holdings.

Objects are accessioned by means of formal procedures. Proposals for additions to the collections will be addressed to the Executive Director. The Collections Committee holds regularly scheduled meetings and may consult by other means of communication. A majority of those present and voting will read or hear presentations on proposed acquisitions and vote to recommend accession or refusal. Final authority rests with the Executive Director. The Executive Director will be reasonably assured that a clear and legal title can be obtained by and transferred to the Museum. In complying with these provisions, the Executive Director will consult as widely as is necessary and reasonable to obtain such assurances. In doubtful cases, the Executive Director may request the assistance of the University Office of General Counsel. Objects being considered for accession are covered by the Museum's transaction receipt that contains the terms of temporary deposit. A Deed of Gift setting forth an adequate description of the accession will be kept on file in the Collections Management office (see Appendix D: JSMA Accession Procedures).

The Executive Director is empowered to accept gifts in the following situations, in lieu of a vote by the Collections Committee:

1. Year-end Gifts: The Executive Director, Curators, and Collections Manager will convene, as needed, between the last Collections Committee meeting for the calendar year and the year-end to review gifts offered before the end of the calendar year and to determine which to accept. The Collections Committee will receive notification of these gifts at its next regularly scheduled meeting.
2. Gifts offered during Executive Director and Curator travel: The Executive Director or Curators may be offered gifts to the collection during their travels with a limited time to obtain approval. In this situation, the individual who is traveling will provide sufficient information to the Executive Director, Curators, and Collections Manager for their review and decision.

The Executive Director is empowered to make purchases in the following situations, in lieu of a vote by the Collections Committee. The Executive Director may purchase objects for the collection provided that the individual object's purchase price is less than \$10,000 and funds have been identified for the purchase. This should only be used when a delay in acting would result in the Museum forfeiting the opportunity to purchase the object.

The Museum will NOT accession into the collection the following:

1. Objects that are restricted or that carry conditions set by the donor are not accessioned except in rare circumstances on the recommendation of the

Executive Director, the Chief Curator, and the Collections Committee and require Vice President for University Relations and Provost approval; in this situation, every effort should be made to place a reasonable limit on the time for which the restrictions or conditions will apply and to define the conditions under which their force may terminate.

2. Objects of intellectual property (copyright, patent, trademark, or trade name).
3. Objects that require care and storage beyond staff and institution ability due to size, weight, or condition.
4. Objects that are redundant.
5. Objects for the express purpose of subsequent sale to increase or upgrade collections.
6. Objects outside of its fields of collecting, with the exception of objects of unusual distinction or merit.
7. Objects that pose a threat to other objects in the collection.
8. Objects that pose a threat to human health or safety.

Legal Restrictions to Accession

Objects will be accessioned only when the Museum has determined to the best of its ability that they have been collected, exported, and imported in full compliance with the current laws and regulations of the country or countries of origin, of the federal government of the United States, and of the individual states within the United States. However, the Museum may accept objects that have been confiscated and offered to the Museum by government authorities. The Museum will in all cases abide by the Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property adopted by UNESCO in 1970 and by the Native American Graves Protection and Repatriation Act (NAGPRA).

AAM-specified objects of Nazi-era provenance, currently European paintings and Judaica, will be acquired only when the Museum has taken all reasonable steps to determine provenance and determine that they are not unrestituted illegally confiscated objects. The Museum participates in the Nazi-Era Provenance Internet Portal.

Should evidence be presented to the Museum that an object in its possession was acquired illegally, subsequent to the date on which this policy was approved, the Museum staff and the Collections Committee will conduct an investigation into the circumstances. If justified by the results of the investigation and having obtained approval from the University Office of General Counsel, the Museum will return the object to its rightful owner, to the extent that it is legally possible and practical to do so.

Ethical Considerations of Accession

All members of the Museum staff, Leadership Council, Collections Committee and University of Oregon administration supervising the Museum will abide by the Museum's Code of Ethics with regard to accessions to the collection (see Appendix E: JSMA Code of Ethics).

To prevent a conflict of interest, the following will apply:

1. Any member of the Museum staff, Leadership Council, Collections Committee or University of Oregon administration supervising the Museum who is offered or interested in personally acquiring an object that would also support the Museum's collections must first offer the Museum the opportunity to acquire it. This information will be submitted to the Executive Director in written form. Only if the Museum is not interested in acquiring the object may the individual obtain it.
2. No member of the Museum staff, Leadership Council, Collections Committee or University of Oregon administration supervising the Museum may start a personal collection that is in conflict with the Museum's acquisition priorities. Where such a collection already exists, the Executive Director is to be notified in writing and the Museum is to be given serious consideration as the final repository.
3. No member of the Museum staff, Leadership Council, Collections Committee or University of Oregon administration supervising the Museum will expand or revise personal collections in any subject area represented in the Museum and must otherwise avoid the appearance of competing privately with any function of the Museum.
4. The Museum's staff will supply individual consultation and advice to members of the public only in situations where it is ascertained and agreed that such action will result in specific benefits to the Museum. For example, the staff may advise concerning the acquisition of art or artifacts by an individual who represents that he or she plans to present the object to the Museum at an agreed time and in an agreed way, but the staff will not assist in the building of a collection merely in hopes that the collection, or part of it, will be willed or given to the Museum.
5. The staff will not make professional monetary appraisals of objects, including the establishment of tax-deductible values for gifts to the Museum. The staff may provide a list of appraisers or appraisal services and encourage donors to rely on their own tax counsels for information regarding current federal tax regulations for non-cash gifts.
6. The Museum's staff may identify and authenticate (but not appraise) an object or collection for professional or educational purposes only or in compliance with the legitimate requests of professional governmental bodies or their agents.
7. The Museum will not acquire objects that it has reason to believe have been unethically collected or unethically alienated from their place of origin, even when not in contravention of the relevant formal laws.

Deaccessions Policy

The Museum recognizes its obligation as steward of the collections and takes great measures to retain and maintain these collections according to museum best practices and standards. At times, it may become appropriate or necessary to deaccession an object that no longer serves the Museum's mission or cannot be properly stored, preserved, or used. Decisions to deaccession are made in the interest of strengthening the collections and are made with the best

interests of the Museum, the University of Oregon, the public they serve, the public trust they represent in maintaining and preserving the collections, and the scholarly and cultural communities they represent.

Before any object is deaccessioned from the collection, reasonable efforts will be made to ascertain that the Museum has clear and legal title and is free of donor restrictions. Where restrictions exist as to use or disposition of the object, the Museum will observe these conditions strictly, even when it may not be legally bound to do so. If there are any questions as to intent or force of restrictions, the Museum will seek advice of the University Office of General Counsel. The object must have been in the collection at least two years or for the length of time required by tax codes for the donor's benefit.

An object may be removed permanently by transfer, exchange, sale, or destruction when one or more of the following applies:

1. Object no longer has study, research or exhibition value;
2. There are duplicates (e.g., identical or near-identical editions of a print);
3. There are more examples of the type of object in the collection (single artist, period, etc.) than would be exhibited or reasonably used for comparative study purposes;
4. Object is deemed to be of inferior quality, readily available on the market;
5. Condition of object is beyond repair and cannot be safely stored in such condition;
6. Authenticity, attribution, or genuineness of object has changed (e.g., when an object is identified as a known forgery or fake);
7. To comply with the Native American Graves Protection and Repatriation Act (NAGPRA) or the AAM Guidelines Concerning the Unlawful Appropriation of Objects During the Nazi Era; or
8. Object material is potentially hazardous to human health or to other objects.

Objects are deaccessioned by means of formal procedures. Candidates for removal from the collections are proposed by the Curators to the Executive Director and presented to the Collections Committee for its recommendations. The Collections Committee holds regularly scheduled meetings and may consult by other means of communication. A majority of those present and voting will read or hear presentations on proposed deaccessions and vote to recommend deaccession or retention. Final authority rests with the Executive Director. The Executive Director and Collections Committee have a public accountability for their decision to deaccession and the method by which they choose to dispose of an object. There should be complete transparency in the transaction. Adequate description and documentation of deaccessioned objects will be kept on file in the Collections department (see Appendix F: JSMA Deaccession Procedures).

Permanent removal of deaccessioned objects from the collections will be done in a legal and ethical manner. The manner of disposition chosen will represent the best interests of the Museum, the University of Oregon, the public they serve, the public trust they represent in maintaining and preserving the collections, and the scholarly and cultural communities they represent.

Acceptable removal methods are:

1. Transfer
2. Exchange
3. Sale
4. Destruction

Initial consideration will be given to placing deaccessioned objects through transfer or exchange in another non-profit public or private institution with collections policies comparable to those of the Museum, wherein they may serve a valid purpose in research, education, exhibition or public service. Transfer may include Museum reclassification to the Study Collection or another Museum department. In the event of an exchange, the proposed objects must comply with the Museum's accession criteria set forth in this policy. If exchange with a comparable institution is not feasible or desirable, the objects may be sent to public auction with a suitable reserve set; full disclosure of the object's history and provenance will be made. All auctions will be public and as well as publicized as possible. If sale is deemed the most appropriate method of disposal, but the value of the object is insignificant to the extent that auction is not practical, consideration will be given to selling the object in the public marketplace. Only if an object is going to be destroyed can it be offered back to the donor.

Ethical Considerations of Deaccessioning

All members of the Museum staff, Leadership Council, Collections Committee, or University of Oregon administration supervising the Museum will abide by the Museum's Code of Ethics with regard to deaccessioning (see Appendix E: JSMA Code of Ethics). To prevent a conflict of interest, the following will apply:

1. Objects of value will not be given or sold directly or indirectly (e.g., through auction) to any Museum staff member, Leadership Council or Collections Committee member, or University official who oversees Museum operations, funding, or administration, nor to their representatives or immediate families.
2. If practical and reasonable to do so, considering the value of the object under question, the Museum will notify the donor if it intends to dispose of such objects within ten years of receiving the gift. This action is a courtesy and will be construed as a desire for approval, but not permission, to withdraw the objects from the collection.
3. At all times the original donor's wishes will be considered, and where appropriate, new acquisitions obtained through the sale or trade of the original donated item, will be credited to the donor, as in "Gift of... by Exchange."

Allocation of Proceeds

All proceeds realized from the sale of objects removed from the collections will be allocated to the Museum's acquisition fund. Proceeds will be used to strengthen the collections field represented by the object unless that field is no longer a collecting focus of the Museum, in which case the funds may be allocated to another collections field.

Study Collection

The Museum may selectively acquire objects that are primarily used as auxiliary supporting material to the accessioned collections. Acquisition of such objects is approved by the Executive Director upon the recommendation of the Curators and is not subject to the Museum's formal accession policy and procedures. Objects may come into this collection as gifts (designated as Study Collection on their Deed of Gift), purchases, or transfers of deaccessioned objects from the accessioned collections. Study Collection objects are catalogued with the prefix of "SC" by the Collections Manager, who is responsible for maintaining the object information and recording the object in the collections database. Objects may be handled and may be exhibited and stored under less rigorous conditions than those applied to the accessioned collections.

Study Collection objects may be acquired under one or more of the following conditions:

1. Objects will be used.
2. There is sufficient storage.
3. Care and costs do not exceed available resources.
4. Objects are not a threat to accessioned or loaned objects that reside in storage facilities.

Objects may be removed from the Study Collection, if they are damaged or are no longer relevant; in such cases, the Executive Director upon the recommendation of the Curators will make the decision and notify the Collections Manager who will note the reason and date of removal in the object file and database record.

Loans

Incoming

The Museum actively accepts loans of objects needed to enhance or support exhibition content, education programming, or for scholarly study and research purposes. The object on loan may comprise part of a larger loan for an exhibition or it may be an individual loan. Each loan will be for a specified period of time and purpose and will be documented and monitored according to established procedures (see Appendix G: JSMA Incoming Loan Procedures). Each loan must be secured by a written Property Loan Agreement between the Museum and the lender prior to shipment of the loan. As general practice, the Museum will provide fine arts insurance for loans, unless the lender elects to assume the responsibility for insurance coverage. Incoming loans must be approved in advance by the Executive Director or Curators and must allow sufficient time for the Collections Manager to effectively plan and facilitate the loan. The Collections Manager prepares and maintains documentation of borrowed objects. The Museum will return loaned objects to the lender in a timely manner and avoid retaining these objects in storage for extended periods. The Museum's legal and ethical accession policies will be applied to all incoming loans.

Loans are accepted dependent on one or more of the following:

1. The object is appropriate for exhibition content, education programming, or scholarly study and research purposes.
2. The object is in good condition and able to withstand the ordinary strains of display, packing, and transportation.
3. The lender is willing to agree to the Museum's loan terms and conditions and exhibition duration.
4. There is appropriate exhibition and storage space for the loan.

The following restrictions apply:

1. The Museum will not store objects belonging to others that are not required for exhibition, study or research.
2. The Museum will not be responsible for preservation and safekeeping of objects on loan beyond that which it exercises for its own collections.
3. The loan objects are not hazardous to human health or to other objects.

It is the policy of the Museum not to accept unsolicited loans. Any object brought to the Museum and left by the owner for purposes of identification, study, or possible gift or loan is recorded on an incoming receipt, stating the owner's name, address, and reason for deposit. Failure to remove or return the object after good faith efforts to locate the owner may eventually result in it being subject to state of Oregon unclaimed loan statute (see Appendix H: State of Oregon Abandon Property Laws).

Outgoing

The Museum maintains an active outgoing loan program to maximize accessibility to its collections. Requests to borrow objects are considered by means of a letter from the requestor stating the desired objects and loan term, and submission of a facility report and loan agreement forms. Collection objects will not be lent to individuals for private use. Qualified borrowing institutions must demonstrate the ability to provide climate-controlled and secure environments, properly trained staff to handle and care for the objects, and appropriate insurance coverage. Borrowers are responsible for all costs pertaining to the loan including insurance, transport, appraisal fees, photography, conservation, packing, display, and courier requirements. Outgoing loans must be approved in advance by the Executive Director or Curators and must allow sufficient time in order for the Collections Manager to effectively plan and facilitate the loan (see Appendix I: JSMA Outgoing Loan Procedures).

Loan requests for objects composed of organic materials are not to exceed a three-month term due to sensitivity to light exposure without recommendation from the Collections Manager and approval by the Executive Director or Curators. Extended loans are made for a term of one year and are renewable annually as approved by the Executive Director. Longer terms are considered on a case-by-case basis. The Collections Manager prepares and maintains all documentation pertaining to loans from the collection. The Executive Director or Curators may decline requests based upon one or more of the following criteria:

1. Facility does not meet environmental and handling requirements;
2. Insufficient or questionable insurance coverage;
3. Unstable or poor condition of the object being requested;
4. Availability, value and/or rarity;
5. Exhibition or educational purpose does not meet the Museum's goals
6. Insufficient time and/or resources available to process the loan; or
7. Borrower does not comply with or satisfy all of the necessary requirements.

The Borrower must comply with the following Restrictions and Requirements:

1. The borrowing institution will insure the Museum's objects for the full amount specified by the Museum with fine arts insurance coverage, wall-to-wall, and will furnish the Museum with a certificate of insurance prior to release of the objects. The certificate will name the objects' owner as the state of Oregon acting by and through the State Board of Higher Education on behalf of the University of Oregon.
2. Experienced and reputable art transport companies that provide air-ride and climate-controlled vehicles will conduct transportation methods. The Collections Manager will approve transportation methods in advance.
3. The Museum may require that loans be couriered due to the objects', value, composition, travel distance, or the borrowing institution's limited staff resources.
4. The borrowing institution will provide sufficient security while objects are in-transit, being unpacked or packed, in storage, being mounted or dismounted, and on exhibition.
5. No object may be altered, embellished, modified, or dismantled in any way.
6. Should an object be damaged, no repairs will be made or ordered by the borrower unless prior agreement is made and documented in writing with the Museum.
7. Loaned objects may not be used for any commercial purpose whatsoever without specific written permission from the Museum.
8. Loaned objects may not be re-loaned by a borrower without documented permission from the Museum.
9. Adequate recognition of the Museum as lender will be given in gallery labels, news releases, television coverage, and publications, including online, using language stipulated in the Property Loan Agreement.
10. When the purpose for which the loan was made has been completed, the objects will be returned to the Museum, even if the specified term of the loan has not expired.
11. The Museum reserves the right to request the return of any object on loan for longer than a year if needed for an in-house program.
12. The Museum may require a loan fee. In each such case, the fee will be indicated on the property loan agreement.

Collections Care and Documentation

The Museum takes great measures to secure and care for acquisitions and loans in its care, in storage and on exhibit, with the best intentions to safeguard and preserve objects according to Museum best practices and standards. Regular use of archival storage materials, professional art handling methods, and continued study of current collections care practices is paramount to preserving the integrity and longevity of the collections. The Collections Manager oversees the care and control of the collections and related records. Collections objects and loans on exhibition

and in storage are protected against fire, theft, vandalism, and natural disaster by appropriate storage methods, by the installation and maintenance of appropriate fire protection and security systems, and by the establishment of an emergency preparedness plan overseen by the Associate Director of Administration and Exhibitions.

Handling

Only Museum staff trained in professional art handling methods may handle collections objects and loans. The Collections Manager trains and supervises student interns. Interns are prohibited from handling loaned objects. Contracted parties, including preparators, exhibit installers, curators, and researchers, must be granted permission by the Collections Manager to handle accessioned objects. No object will leave its assigned location without written notification and approval by the Collections Manager (see Appendix J: JSMA Art Handling Guidelines).

Environment

All areas where objects reside or are exhibited are maintained at the cleanest and safest level possible. Accessioned and loaned objects are kept in climate-controlled, clean, and secure areas at all times. Regular monitoring of climate levels is conducted to assure the proper relative humidity and temperature levels according to collections needs. Climate regulation is automatic; the Collections Manager will review system readings weekly (more frequently, if needed). Improper fluctuations in RH and climate levels are reported to the Collections Manager for immediate technical support.

Food and beverages are prohibited in all storage areas and galleries. During special events where food and beverages are permitted outside of the galleries, the Museum's "Exhibit A" document applies and is provided by the Facilities Rental Coordinator (see Appendix K: Exhibit A).

Lighting

Storage areas and galleries employ UV-filtered fluorescent lighting systems and incandescent (tungsten/halogen) lighting systems respectively and maintain light levels appropriate for the objects displayed or stored. Lights are always off when staff is not present in storage areas. Light levels are kept low when staff is objecting in storage. Gallery light levels are maintained at levels appropriate to the object materials. The Museum uses barriers and filters to achieve safe levels.

Inventories

A comprehensive inventory of the collections is conducted every two years with spot-check inventories made on a regular base. Inventories are conducted using internal registration methods. Inventory results will identify any changes in the condition, including conservation recommendations. The Collections Manager maintains collections inventory records. Object location fields are updated with the most recent and accurate information.

Conservation

Preservation of the collection's physical attributes is essential to promote future use of and accessibility to the collections. Preventative conservation is the preferred method of care for the collections. No object, accessioned or loaned, will be mishandled or poorly stored. Use of archival quality storage materials, monitoring of light levels and environmental conditions, and limiting object handling to trained staff are methods that support the preventative conservation of all objects.

The Collections Manager or Curators makes recommendations for conservation as necessary. In the event an object requires conservation treatment, it will be of high standard, performed by a professional conservator with training specific to the type of object and treatment. Written and photographic documentation of the treatment are kept in the object's file and database record.

Conservation treatment is performed with respect for the historic and artistic integrity of the object, using reversible methods, and in accordance with ethical standards established by the American Institute of Conservation of Historic and Artistic Objects.

Consultant conservators perform conservation assessments and surveys. The Museum is proactive in applying for grants and seeking private funds to assure that its collections are preserved.

Integrated Pest Management

Professional pest inspections occur once a month in the storage and gallery spaces. The Collections Manager oversees regular monitoring of traps, is present during pest inspections, makes recommendations for improvements, and keeps records of service visits. All Museum staff members are responsible for reporting pest sightings or infestations to the Collections Manager who will examine the threat and make arrangements for treatment. Objects that are infected or threatened by an infestation are isolated and placed in an alternate holding area. Precaution against pest migration is managed by assuring that natural fiber objects such as wood and living or dried plants are treated by fumigation prior to entering storage or gallery spaces.

Security

The University of Oregon Department of Public Safety maintains and oversees a state-of-the-art security system that includes on-site security guards during hours of operation.

The Museum's Associate Director prepares and maintains the Emergency Preparedness Manual and trains staff and volunteers in emergency procedures. Refer to the Emergency/Disaster Plan Manual for further instruction.

Documentation and Record-keeping

In accordance with the Museum's commitment to preserve its collections, it creates a permanent intellectual record of its collections in the form of cataloguing, documentation, and photography. Records that document the gift or purchase process, transfer of title, completed Deeds of Gift, values and appraisals, history of provenance, donor or vendor contact information, and other information specific to the objects exist in a paper object file with essential information also documented in the collections database. The Collections Management office manages the object files and the collections database.

The museum performs routine photography of the collections for reference and documentation purposes, for the online research database (Möbius) as well as for publication quality images for rights and reproductions needs.

The Museum's collections database coordinator oversees the daily operation of the collections database (Mimsy XG) and image files and acts as liaison with the University's IT personnel. The database and image files are maintained and backed up on a regular basis by the University of Oregon's Office of Finance & Administration Information & Technology Services. The Museum is committed to maintaining its database technology current by implanting hardware and software upgrades.

Insurance and Risk Management

The Museum maintains a standard fine arts wall-to-wall insurance policy covering its collections and, as needed, loans to the Museum. Coverage is in effect on Museum premises, in transit and at other approved locations, unless otherwise provided in writing. Insurance coverage is negotiated by the Oregon University System Office of Legal Council Director of Risk Management and implemented by the Collections Manager.

Off-site Storage

Should it become necessary for the Museum to utilize an off-site storage facility for the collection or parts thereof, all professional standards for collections care covered in this policy will apply equally to the objects stored off-site.

Access to Collections and Records

The Museum recognizes its obligation to grant access to collections not on display and to collections records and is committed to making its collections accessible on the internet for the benefit of University of Oregon faculty, and students, and for non-university audiences. Access to collections and records is dependent upon staff time and space availability. Access will be limited to office hours with two weeks notice desirable; exceptions are granted on a case-by-case basis. Individuals may be asked to complete a Research Application that details the purpose of the research and confirms the applicant's acceptance of the Museum's terms and conditions (see Appendix L: Research Application).

Access to the collections is permitted as follows:

1. Object is accessible and readily available. The availability of the object to be viewed depends on its portability, fragility, size, condition, and value.
2. Museum staff authorized to enter storage areas must accompany and supervise individuals granted access.

Access to records is permitted as follows:

1. All Museum archival and object records will be treated as public information with the exception of information deemed restricted by the Executive Director, Curators, and Collections Manager for the safeguarding of the collections, such as location and value information.
2. Permission to access records is not an authorization to publish material.
3. Reproduction of archival or object information will be done only by Museum staff, providing the material can withstand the reproduction process (e.g. photocopying or digital scan).

Academic Partnership

The Museum's collections are central to its mission to serve the University of Oregon academic community. University faculty is actively invited to propose objects or groups of objects to be placed on view for curricular needs and research projects. The faculty may also propose large-

scale exhibitions for in-house or traveling purposes. The Museum makes available the necessary resources, such as staff time and facilities, to support such academic activities. Submissions of both Object and Exhibition Request Forms, made available on the Museum's website, are presented and evaluated by Museum staff at regularly held meetings. Approvals are dependent on the following factors:

1. Funding;
2. Flexibility of Museum exhibition schedule;
3. Scope and complexity of loans;
4. Space and time limitations; and
5. Condition of objects.

Rights and Reproduction and Publication of Collections

The Museum promotes and supports in-depth scholarly research and publication of the collections by its staff, University faculty and students, and outside scholars. Dissemination of information on the collections is realized through a multifaceted program aimed at diverse audiences and includes brochures, wall text, audio tours, annual reports, newsletters, collections and exhibition catalogues, books, articles in journals and magazines, blogs and other on-line resources, videos, cards, posters, and on its website.

The Museum supports the reproduction of objects from the collections through its rights and reproductions program. Permissions are granted according to state of Oregon legal guidelines and U.S. and international copyright laws. The Museum may charge a rights and reproductions fee to cover costs and provide revenue. The Collections Manager and the Executive Director must approve purpose for reproduction.

Non-exclusive rights to reproduce objects in the Museum's collections may be granted subject to agreement to the Museum's standard rights and reproduction terms and conditions. The rights and reproductions manager will prepare the Rights and Reproductions Agreement and an invoice for processing costs plus any applicable use fees. All published reproductions must bear the object's official credit line as stipulated by the Museum.

Review and Revision of Collections Management Policy

The Collections Management Policy is reviewed every 5 years. The Collections Manager manages the document and recommends necessary revisions to insure compliance with current museum best practices and standards. The Oregon Administrative Rules Chapter 571, Division 51 is updated to reflect the changes made.

Appendix A

The Oregon Administrative Rules contain OARs filed through July 15, 2010

OREGON UNIVERSITY SYSTEM, UNIVERSITY OF OREGON

DIVISION 51

MUSEUM OF ART

571-051-0005

Museum Acquisition Procedure

(1) Conditions. Because the Museum of Art's collections are vital to its usefulness and continued excellence, all acquisitions shall meet certain conditions:

(a) They should meet at minimum the criteria of quality reflected in the best objects now in the Museum's collections;

(b) They should be relevant to the purposes and functions of the Museum, which include support for the institution's teaching and research in the visual arts as outlined in the University of Oregon Policy Statement "Museum of Art Statement of Purpose", so as to strengthen those collections in which the Museum specializes and for which it is recognized by scholars and artists;

(c) Because the Museum must be able to provide proper storage and care of the objects accessioned into the collections, no object will be accepted which cannot be properly cared for and stored;

(d) The Museum must observe all State of Oregon, federal, and applicable international laws on acquiring imported art objects and will not, therefore, accept objects collected or acquired under questionable or illegal circumstances. The Museum informally endorses the UNESCO Convention (to which the U.S.A. has not yet become a signatory) on the Means of Prohibiting and Preventing Export and Transfer of Ownership of Cultural Property;

(e) Title to objects shall be obtained free and clear of restrictions and qualifications of any type or manner, unless it is deemed by the University authorities (the President or the President's designees) in concurrence with the Museum Director, the Museum Acquisitions Advisory Committee, and the Curator(s) of Special Collections to be in the best interests of the University. If an object is accepted under restricted conditions, notation of the restriction must be included in the object's permanent documentation.

(2) Criteria. Objects are added to the permanent collection by gift, purchase, bequest, exchange, or other transactions by which legal title passes to the Museum, the University, and the State. Before accepting objects to the permanent collections, the Museum Acquisitions Advisory Committee shall consider whether:

(a) The object to be accessioned is destined for a particular collection area. Objects not so destined shall be accepted only in rare circumstances, including but not limited to situations where it may be prudent and necessary to accept an entire private collection, even though some of the works may not be regarded as having Museum quality, in order to obtain desired works. The Museum Acquisitions Advisory Committee shall make specific recommendations where entire collections are to be considered for acquisition;

(b) The object is unique or of greater aesthetic quality or value than similar ones already in the collections;

(c) Proper care can be given to the object;

(d) If an object is offered for sale, a comparable object may be obtained by gift, bequest, or exchange. In such cases, the object so obtained shall be accessioned;

(e) The object is in suitable condition for use and exhibition;

(f) The provenance of the object, as determined by the Director or appropriate Curator(s) of Special Collections, is satisfactory;

(g) The object is encumbered with conditions imposed by the donor regarding use or future disposition. As a rule, only unrestricted objects should be accepted;

(h) The use of the object is restricted or encumbered by intellectual property rights (copyright, patent, trademark, or trade secret) or by its nature (obscene, defamatory, potentially an invasion of privacy, physically hazardous);

(i) The object is generally consistent with the goals of the Museum.

(3) Appraisals and Donor Tax Deductions. Gifts to the University of Oregon Museum of Art are tax deductible as a charitable donation based on the fair market value of the gift evidenced and substantiated in a manner acceptable under federal Internal Revenue Service regulations:

(a) Staff members of the University of Oregon Museum of Art shall not provide appraisals for donated objects;

(b) Neither the Museum, the University of Oregon, nor the State of Oregon is responsible for the authenticity and accuracy of the appraisal.

(4) Museum Acquisitions Advisory Committee. The Museum Acquisitions Advisory Committee is an advisory committee to the Director composed of, in addition to its permanent, ex officio members, not more than four acknowledged art, art museum, or legal specialists:

(a) The permanent, ex officio members of the committee are the Director and Registrar of the Museum, the chairperson (or designee) of the Board of Governors of the Friends of the Museum, and the Curator(s) of Special Collections;

(b) The other members of the committee are appointed for three-year terms by the Museum Director in consultation with and with the approval of the Museum Acquisitions Advisory Committee, the Museum of Art Advisory Committee, and the Curator(s) of Special Collections. The terms of office for these appointees shall be staggered to provide for committee continuity;

(c) The committee chairperson shall be selected by the committee as a whole, and shall hold this position for a two-year term;

(d) No more than one member from one academic department may be appointed to the committee;

(e) If for any reason (other than the expiration of a member's term of office) an appointed position on the committee becomes vacant, the vacancy shall be filled in the same manner as original appointments. The replacement member shall serve for the unexpired portion of the vacating member's term.

(5) Meetings of the Museum Acquisitions Advisory Committee shall be called by the Director in consultation with the chairperson when the Director determines that there is a need. The following procedures shall be followed:

(a) For each object under consideration for acquisition, the Director or Curator of a Special Collection shall present to the Museum Acquisitions Advisory Committee the documentation and provenance of the object and explain its contribution to the collection as a whole;

(b) If possible, each object under consideration by the Director should be physically present for evaluation by members of the committee. If the chairperson determines that this is not possible, adequate photographs or slides of the object shall be presented to the committee;

(c) Minutes of all Museum Acquisitions Advisory Committee meetings shall be taken and maintained;

(d) The Museum Acquisitions Advisory Committee may suggest and recommend to the Director for purchase work deemed desirable for the collection when funds are available.

(6) The Director shall make all decisions with reference to acquisitions.

(7) The Director shall notify donor(s) of acceptance or rejection of objects.

Stat. Auth.: [ORS 351](#) & [ORS 352](#)

Stats. Implemented: [ORS 351.070](#)

Hist.: UOO 1-1985, f. & ef. 4-9-85

571-051-0010

Museum De-Accessioning Procedure

(1) Criteria. An object in the Museum of Art collection can be considered for de-accessioning only if it meets at least one or more of the following criteria:

(a) It has physically or organically deteriorated beyond repair as determined by a reputable conservator; or

(b) It requires conservation, the cost of which would exceed the Museum's funds or the Museum's ability to raise the necessary monies; or

(c) It cannot be either properly stored or properly exhibited by the Museum; or

(d) It is, in the opinion of qualified outside experts, of markedly inferior quality and/or there is a superior example of the same kind and type already in the collection:

(A) The qualified outside experts shall be neither current nor former Museum of Art employees;

(B) The qualified outside experts shall be selected by the Director of the Museum of Art after consultation with the Museum Acquisitions Advisory Committee.

(2) Evaluation. Removal of object(s) from the Museum's permanent collections can be recommended only by the Director, the Curator(s) of Special Collections, the Museum Registrar, or a conservator:

(a) After such a de-accession recommendation is made, a de-accession worksheet for each object shall be begun and placed in the documentation file;

(b) A thorough search shall be made by the Museum Registrar of Museum records and related University archival files to determine legal ownership as well as restrictions imposed by the donor and accepted by the Museum at the time of accessioning. Relevant requests or preferences of the donor shall also be taken into consideration;

(c) The qualified staff members, including the Director, Curator(s) of Special Collections, and the Museum Registrar, will then meet on call of the Director to discuss the results of this search and to propose an appropriate course of action. De-accession action requires a unanimous vote. The results of this review and of any de-accession vote shall be recorded in the documentation file;

(d) Before any object can be de-accessioned and exchanged or sold from the Museum collections (whether from "permanent exhibition collections" or "study collections"), one recognized professional expert (who is neither a current nor former Museum of Art employee), recommended by the Museum staff, shall be consulted for an opinion on the quality of the object. If the reason for the recommendation is the poor condition of the work, the expert shall be a qualified conservator in the special area of the object under consideration and should additionally offer an opinion as to the physical and economical feasibility of reconditioning the work. This expert opinion shall be submitted in writing, dated, and kept in the permanent documentation file;

(e) No further de-accession action shall be taken for a period of at least six months after receipt of the outside expert's opinion;

(f) After the six-month waiting period, a re-evaluation of the recommendation to de-accession shall be made by the professional staff in light of all relevant documentation and the recorded expert opinion. If the re-evaluation unanimously (including the vote of the Director) confirms the staff's recommendation in favor of de-accessioning, the Director shall put these findings in writing. The Director shall submit the findings, substantiating the recommendation with copies of the expert opinion and other related documentation, via the appropriate Vice-President to the University President. The Vice-President and President shall be asked to provide written approval for disposal of the object;

(g) If approval to de-accession is not granted, a statement to that effect shall be placed in the object's documentation file. A request for presidential reconsideration may be submitted when additional justification is available.

(3) Procedures. Upon receipt of written approval to de-accession an object, the following procedures shall be implemented:

(a) The Museum Registrar shall submit a request to the State Inventory Control Office (with copies of supporting documentation) for permission to remove the object(s) from the Museum collection inventory;

(b) A written, dated appraisal from a certified art appraiser (who is neither a current nor a former Museum of Art employee) shall be sought by the Director to establish current market value of the object(s) to be de-accessioned;

(c) In order that objects de-accessioned from the Museum collection may continue to serve the purpose for which they were initially acquired, an effort shall be made to place them (by exchange or sale) in another non-profit institution. To achieve this end, such objects shall be advertised in appropriate professional publications. Such advertisement shall clearly state that neither the Museum of Art, the University of Oregon, nor the State of Oregon guarantees the authenticity nor the appraised value of the work. This disclaimer shall be repeated in writing at the time of sale or exchange;

(d) Sales to private parties or profit-making entities shall be pursuant to state law dealing with disposition of surplus property. Whenever possible, the work of art should be sold at public auction in a city outside Eugene. In all cases, the sales should be public, although some works of art because of their nature may be more appropriately sold in antique or second-hand stores. De-accessioned objects shall not be sold to any Museum of Art staff member or University of Oregon official whose responsibility includes Museum operations, funding, or administration, nor to their representatives or immediate families. Proceeds from sales are to be earmarked for the acquisition of objects which will improve the Museum's collection;

(e) Exchanges of de-accessioned objects shall be for object(s) of equal or greater value to the Museum and these transactions shall be made in accordance with the procedures of the Museum Acquisitions Advisory Committee;

(f) Any transactions involving a combination of object(s) and monies (given or received) shall be negotiated at the discretion of the Director after consultation with the Museum Acquisitions Advisory Committee;

(g) Copies of records for de-accessioned objects including provenance, research, and data on publication, and a statement authorizing removal from the Museum collection (signed by the Director and the appropriate University administrators) and any other necessary documentation will be forwarded to the acquiring institution (or individual) at the time of the exchange of ownership;

(h) Notes shall be made on the donor's card showing disposition of objects. Where feasible, the exhibition label on object(s) acquired through exchange of a donation, or with funds derived from the sale of a donation, shall credit the donor of the exchanged or sold gift. Original records for de-accessioned objects will remain on permanent file in the Museum Registrar's office, with the de-accession work sheet showing completion of all steps in the de-accession process, including record of means of disposal, new ownership, and the original document showing State of Oregon and University approval of the de-accessioning and the Director's authorization. Cross-references will be placed in catalog card files;

(i) The Museum Registrar shall initiate procedures to remove de-accessioned objects from the computer inventory records and place notice of de-accessioning in the archival microfilm records for the year of de-accession.

Stat. Auth.: [ORS 351](#) & [ORS 352](#)
Stats. Implemented: [ORS 351.070](#)
Hist.: UOO 1-1985, f. & ef. 4-9-85

Appendix B



UNIVERSITY OF OREGON

January 27, 2010

MEMORANDUM

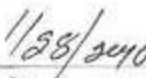
To: James Bean, Senior Vice President and Provost
Michael Redding, Vice President for University Relations

From: Richard W. Lariviere, President

Re: Governance of Jordan Schnitzer Museum of Art

I approved the joint governance model as proposed in your January 20 memo.

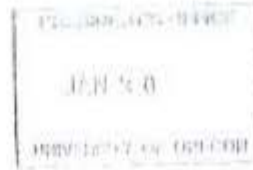

Signature


Date

OFFICE OF THE PRESIDENT

1226 University of Oregon, Eugene OR 97403-1226 ☎ (541) 346-3038 ☎ (541) 346-3017 www.uoregon.edu

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January 20, 2010

MEMORANDUM

To: President Richard Lariviere

From: James Bean, Vice President and Provost
Michael Redding, Vice President, University Relations

RE: Governance of Jordan Schnitzer Museum of Art

Following our recent meeting with JSMA Executive Director Jill Hartz and a review of the museum's new mission documents, we would like to recommend a joint governance model for the museum. We believe this management model will evidence clear and consistent support of the JSMA's dual mission to serve both the academic program of the University of Oregon and our larger community in Eugene, Springfield and beyond. We are attaching to this memo the JSMA's approved mission, goals, and strategies document, as approved by the JSMA Leadership Council in June 2009, following extensive participation from the UO administration, faculty, students, and members of its diverse off-campus community.

We recommend the following specific steps regarding this governance model.

- 1) Ms. Hartz will be a direct report to both of us. She will continue to meet on a regular basis with Greg Stripp to discuss operational issues. Michael and Jim will jointly serve as her supervisors and conduct her annual performance review.
- 2) Strategic initiative proposals will be submitted through Russ Tomlin's office, with the support of Michael.
- 3) Museum budget and staffing will continue to be managed by University Relations.

Further, in accordance with the documentation necessary for the museum's upcoming re-accreditation, we recommend that day-to-day management of the Jordan Schnitzer Museum of Art continue to be delegated to the museum's Executive Director.

Once this is finalized, we will contact the deans and other senior members of the administration to advise them of this change and will meet with the appropriate internal and external groups to discuss the new reporting relationship.

We feel confident that placing the museum in both the academic and external relations units of the university will affirm its important roles as an academic museum and as a community museum. Reporting to the Provost's Office affirms the JSMA's mission to serve the entire university, while reporting to University Relations affirms our public service commitment.

UNIVERSITY RELATIONS

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Jordan Schnitzer Museum of Art Mission Documents

VISION

We will become one of the finest university art museums in the world.

BELIEF

We believe that knowledge of art enriches people's lives.

MISSION

The Jordan Schnitzer Museum of Art enhances the University of Oregon's academic mission and furthers the appreciation and enjoyment of the visual arts for the general public.

OUR CONSTITUENTS

The Museum's primary constituents are the University of Oregon's students, faculty and staff as well as regional residents and visitors. Our varied activities extend our service to an even wider audience of scholars, artists, collectors, critics, and museum professionals.

GUIDING PRINCIPLES

The museum experience enriches people's lives.

We contribute to the education of university students and help them become culturally competent global citizens.

We recognize our visitors' different learning styles and the needs of a multigenerational and diverse audience.

Our visitors have enjoyable museum experiences that make them want to return.

Our collections, programs, and research are of the highest quality.

We follow the highest ethical, academic and professional standards.

We find collaborative opportunities on- and off-campus that make the Museum central to learning and build diverse audiences.

STRATEGIC OBJECTIVES

Programs

The Museum presents stimulating, innovative and inclusive programs and exhibitions that enhance the academic curriculum, emphasize cross-cultural understanding, provide broad education experiences, and support collaborative and interdisciplinary opportunities on- and off-campus. Ongoing evaluation measures how effectively the Museum's program goals are being realized.

Collections

The Museum collects, preserves, studies, exhibits, and interprets works of the art for the benefit of the University of Oregon curriculum and for the enrichment of the general public. The JSMA is dedicated to strengthening its Chinese, Japanese, Korean, American and Pacific Northwest art collections and to acquiring fine examples from the history of art, from earliest times to the present, representing cultures throughout the world.

Research and Publications

The Museum supports high-quality research on its collections and programs by its staff, University of Oregon faculty, students and others who use its resources. Research is made accessible through teaching, exhibitions, programs, publications, and online;

Funding and Development

The University allocates funds for staff, operations, security, and facility maintenance to the greatest extent possible. The Museum raises revenue for all programs not covered by the university's general fund from diverse sources, including earned income, individuals, foundations, corporations, and local, state, and federal grants agencies. The Museum is committed to a balanced budget model. The Leadership Council is a key support group, raising money and advocating for the Museum.

Communications & Marketing

Internal communications are proactive, direct, and honest, aiming for transparency and inclusivity by and among all University of Oregon staff and volunteers. External communications represent the full range of Museum functions and services and are proactive, direct and engaging, while delivering a clear consistent message

Visitor Experience

The Museum aims to provide consistently high-quality programs and customer service that enhance visitors' on-site and online experiences, leading to ongoing engagement with the Museum.

Facilities

The Museum performs effective and efficient maintenance for the overall care of the Museum facilities, including following preventive maintenance schedules, conducting timely HVAC/mechanical and equipment inspections, and other related work. The Museum ensures that exhibition and work areas are clean and maintained at the highest standard possible and that detailed condition reviews and reports are completed on a regular basis.

Risk Management

The Museum develops, implements, and monitors preventative measures and intervention plans and maintains a comprehensive security program for minimizing risk to the collections, human life, and the Museum facility at all times, during regular operations and from unexpected threats and emergencies.

Management & Governance

The Museum employs strong, competent leadership that is financially prudent, encourages achievement, and measures performance against standards of excellence. The university's administration and the Museum's Leadership Council are supportive and informed advocates of the Museum. The Executive Director and senior staff are responsible for developing, implementing, reviewing and revising the long-range plan with input from the Museum's constituents, including the Leadership Council.

|

Human Resources

The JSMA employs and trains competent staff and volunteers who strive for excellence. The Museum supports diversity, training and professional advancement opportunities for its staff and volunteers and provides training opportunities for students interested in the museum profession. The Museum follows the university's human resources procedures, including annual evaluations.

Ethics, Academic & Professional Standards

The Museum, its employees, and volunteers adhere to the highest academic, ethical and professional standards of the university and the American Association of Museums in all that they do on behalf of the Museum. This commitment is realized in the Museum's commitment to maintaining its accreditation from the American Association of Museums.

Leadership Council & Support Groups

The Leadership Council serves as the Museum's primary advisory and fund-raising body of volunteers and helps to ensure the Museum's artistic quality, educational integrity, and financial strength. Museum members, Exhibition Interpreters, and other support groups are integral to the Museum's ability to fulfill its mission.

Appendix C

Collections Committee Position Charter

Purpose: The Collections Committee is an advisory committee that

1. Supports the JSMA's collections strategy: *The Museum collects, preserves, studies, exhibits, and interprets works of the art for the benefit of the University of Oregon curriculum and for the enrichment of the general public. The JSMA is dedicated to strengthening its Chinese, Japanese, Korean, American and Pacific Northwest art collections and to acquiring fine examples from the history of art, from earliest times to the present, representing cultures throughout the world.*
2. Assists the Executive Director in establishing policies and procedures for the acquisition, accession, deaccession, cataloging, care, conservation, storage, and risk management of all works of art in the permanent collection;
3. Pursuant to established policies and procedures, reviews and advises the Executive Director regarding all acquisitions and deaccessions;
4. Assists the Executive Director in the identification of funding sources for acquisition and the cultivation of donors of works of art, including bequests, and helps to develop programs and projects, including trips, for those interested in collecting; and
5. Participates in ongoing dialogue regarding all such matters that may impact the development and stewardship of the permanent collection, including, but not limited to, questions of ethics and resources.

Membership: The Collections Committee is a standing committee whose members are appointed by the President of Leadership Council, with the advice of the Executive Director and the Executive Committee, and who serve at the discretion of the President. The chair shall be appointed by the President. Committee members need not be Council members, but must be JSMA members. To the extent practicable, Committee membership shall reflect, approximately, equal numbers of on-campus and off-campus representatives. The Executive Director is an *ex-officio* member of the committee.

Meetings: The Committee meets quarterly on a schedule presented at the beginning of each fiscal year. Additional meetings may be called if necessary. A quorum of the Committee shall be a simple majority of the members.

Decisions: Advice and recommendations of the Committee shall be decided by majority vote of those present and voting, and then given to the Executive Director in making his or her decisions.

Members Obligations: All members of the Committee have an obligation to participate actively in all Committee endeavors and to support the majority decisions of the Committee. The Committee will annually assess the Committee's performance in fulfilling its duties and, if necessary, the adequacy of the Charter.

<u>Collections Committee Members 2009 – 2010</u>		
<u>Name</u>	<u>E-mail</u>	<u>Phone</u>
Terry Carter	Terry.carter@comcast.net	541.686.2558
Larry Fong (JSMA staff)	lmfong@uoregon.edu	541. 346.0971
James Harper	harper@uoregon.edu	541.346.5027
Jill Hartz (ex officio)	hartz@uoregon.edu	541. 346.0972
Yongsoo Huh	yshuh@hotmail.com	011-822-3473-6566

Lee Michels	lgm@rapc.org	541. 225.7717
Adriane Tafoya (staff)	adrianet@uoregon.edu	541. 346.0970
James Walker, Chair	walkerji@comcast.net	541.485.8727
Akiko Walley	Awalley@uoregon.edu	NEED PHONE

Appendix D

JSMA ACCESSION PROCEDURES

1. The museum Executive Director or Curators will inform the Collections Committee of object(s) for accession consideration.
2. The Executive Director or Curators will inform the Collections Manager or Registrar and will provide any/all documentation including owner contact information and object information.
3. The Collections Manager or Registrar will make shipping arrangements in coordination with the donor/vendor to receive the object(s) in a timely manner; the donor pays for incoming shipping except in exceptional cases.
4. The Collections Manager or Registrar will create a record in Mimsy in the Entry module which will assign the next loan number sequence (i.e. L2010:), enter as much information as possible, and give its location(s) as "coming soon". If an image is provided, submit the image to the museum's photographer to attach the image to the database record.
5. The Collections Manager or Registrar will create an object file with all documentation provided and generated pertaining to the object(s), including print out of image(s) if provided.
6. When the object arrives at the museum, the Collections Manager or Registrar will unpack or request for assistance to unpack the object(s), attach a string tag label to the object, image if necessary, fill out a condition report, place in appropriate storage, and update its location in the database.
7. The Collections Manager or Registrar will generate and sign an incoming receipt to send to the owner/vendor for countersignature to confirm receipt of the shipment and notify of any condition issues.
8. The object(s) will be presented at the next Collections Committee meeting for discussion or the Committee will be notified via email. Ultimate decision rests with the Executive Director.
9. The Executive Director or Curator will notify the Collections Manager or Registrar of accession decision to generate the deed of gift.
10. The Collections Manager or Registrar will generate three copies of the deed of gift and route to the Executive Director to send along with the letter of acceptance with a copy of the letter to the Collections Management Office for the object file.
11. When the signed deeds of gift are returned, the Collections Manager or Registrar will secure counter signatures and return one copy to the donor.
12. One copy is kept in the object file in the Collections Management office and the other is kept in the Development files along with a copy of the letter of acceptance.
13. If the object(s) were accepted into the permanent collection, the Collections Manager or Registrar will assign the next permanent number(s) generated in Mimsy, attach or apply the permanent accession number to/onto the object(s), locate suitable location if the object(s) is in a temporary storage unit or space, provide new storage materials if necessary and/or request new matting or box construction, and advise the collections photographer to take quality image(s), if none exists, of the object(s).

14. At the end of the fiscal year a report of the accessions are provided to the University Property Control Unit.
15. If the object(s) are rejected, the Executive Director or Curator will notify the owner of the decision and advise them that the Collections Manager or Registrar will contact them to make the return shipping arrangements. The museum pays for the return shipping of the object(s).
16. The Collections Manager or Registrar will make appropriate shipping arrangements in coordination with the owner/vendor, remove string tag label(s) from the object(s), coordinate or conduct the packing of the object(s) for shipments.
17. Upon release of the object(s), the Collections Manager or Registrar will update the database location(s) to "returned to owner" and generate, sign, and send two copies of an Outgoing Release form countersignature.
18. The Collections Manager or Registrar will keep all documentation in the donor/vendor files kept in the Collections Management office.

Rev. 3/2010

Appendix E



UNIVERSITY OF OREGON

Jordan Schnitzer Museum of Art Code of Ethics

This Code of Ethics for the Jordan Schnitzer Museum of Art at the University of Oregon ("Museum") applies to the Museum's staff, university staff with direct supervision of the Museum, and Museum volunteers. Everyone subject to this Code of Ethics pledges to uphold his or her responsibility to serve the public without regard to ideological preference and affirms that he or she will avoid conflicts of interest and the appearance thereof.

MISSION OF THE JORDAN SCHNITZER MUSEUM OF ART

The Jordan Schnitzer Museum of Art enhances the University of Oregon's academic mission and furthers the appreciation and enjoyment of the visual arts for the general public.

GOVERNANCE AND LEADERSHIP COUNCIL

The Museum's collections are owned by and held in trust for the University of Oregon and the people of the State of Oregon. The State Board of Higher Education is charged with the stewardship of the University of Oregon and is the ultimate governing authority of the Museum. The Board has delegated the responsibility for University operations to the President of the University. The Museum is an integral component of the University of Oregon and is allocated ongoing resources for its operations as permitted by the University's financial capacity to do so. The President delegates direct supervision of the Museum to the Vice President for University Relations and the Senior Vice President and Provost. Responsibility for day-to-day operations is

JORDAN SCHNITZER MUSEUM OF ART

1223 University of Oregon
Eugene, OR 97403-1223
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delegated to its Executive Director. Members of the Museum's Leadership Council provide advice and support to the Executive Director on matters of collections, public programs, long-range planning, and development. In fulfilling their responsibilities, the members of the Leadership Council will consider foremost the Museum's mission.

Thus, individuals comprising all governing and advisory authorities, including the Leadership Council, will:

- understand and support the mission of the Museum;
- comply with applicable local, state, and federal laws and international conventions;
- uphold their responsibility to serve the best interests of the Museum and the public without regard to ideological preference;
- hold in strictest confidence information provided to them, their deliberations, and the advice ultimately given to the Executive Director;
- not knowingly compete with the Museum for collections or individual works of art or use their Museum affiliation to advance their personal collecting. Those with significant personal collections will make disclosure of their holdings and significant acquisitions to the Executive Director;
- neither use nor attempt to use his or her position to obtain financial gain or avoid financial detriment, including for a relative or member of the individual's household or any business with which the the individual or a relative or member of the household of the individual is associated, if the financial gain or avoidance of financial detriment would not otherwise be available but for the public official's holding of the official position or office.
- neither solicit nor accept gifts in any calendar year exceeding \$50 from any person with an administrative interest in the Museum.
- avoid actual and potential conflicts of interest and the

appearance of conflicts of interest. In the event such an actual, potential or apparent conflict of interest arises, the individual will a) disclose it in writing to the Executive Director; and (b) abstain from deliberations and voting on the matter. In those situations where the conflict cannot be resolved, resignation from the Leadership Council may be appropriate.

Members of the Leadership Council will never speak or hold themselves out as speaking on behalf of the Museum or the University, unless specifically called upon to do so by the Executive Director.

PROFESSIONAL PRACTICES FOR UNIVERSITY AND MUSEUM STAFF AND VOLUNTEERS

The staff and volunteers of the Museum, including those University faculty, administrators, and students whose work involves supervision of the Museum or access to its collections, will ensure that:

- all those who work for or on behalf of the Museum, in a paid or volunteer capacity, understand and support its mission and public trust responsibilities;
- the Museum's collections and programs and its physical, human, and financial resources are protected, maintained, and developed in support of the Museum's mission;
- the Museum is responsive to and represents the interests of the University community and a pluralistic society;
- working relationships among University administration, faculty and students, Leadership Council members, Museum employees, and volunteers are based on equity and mutual respect;
- Museum policies and statements of purpose are articulated in writing; that all operational, financial, and human resource policies of the Jordan Schnitzer Museum of Art are in compliance with the University of Oregon; that all are in alignment with best

practices recommended by the American Association of Museums; and that such policies and practices are enforced and prudent oversight is practiced;

- the Museum's name, reputation, property, and services are not misused and that its good will in the community is not compromised;
- if commercial support is accepted, it is in accordance with the mission of the Museum and does not compromise the standards of objective presentation.

Conflicts of Interest

The staff and volunteers of the Museum, including those University faculty, administrators, and students whose work involves supervision of the Museum or access to its collections, will ensure that:

- the public good is promoted rather than individual financial or other personal gain;
- actual and potential conflicts of interest and the appearance of conflicts of interest are avoided. In the event such an actual, potential or apparent conflict of interest arises, the individual will a) disclose it in writing to the Executive Director; and (b) abstain from deliberations and voting on the matter. In those situations where the conflict cannot be resolved, resignation from the Leadership Council may be appropriate.
- no staff or governing authorities will compete with the Museum for collections or individual works of art, and that those with significant personal collections will make full disclosure of holdings and activities to the Executive Director;
- no staff or governing authorities will use his/her museum affiliation to promote his/her or an associate's personal collecting activities;
- they neither use nor attempt to use their position to obtain financial gain or avoid financial detriment, including for a relative or member of the individual's household or any business with which the the individual or a relative or member of the

household of the individual is associated, if the financial gain or avoidance of financial detriment would not otherwise be available but for the public official's holding of the official position or office; and

- neither solicit nor accept gifts in any calendar year exceeding \$50 from any person with an administrative interest in the Museum, including dealers or other service providers to the Museum.

Training and Responsibilities

The staff and volunteers of the Museum, including those University faculty, administrators, and students whose work involves supervision of the Museum or access to its collections, will ensure that:

- professional standards and practices inform and guide museum operations, and that staff members comply with American Association of Museums codes of ethics and management procedures developed for their specific positions (e.g., Curators, Registrars);
- shared staff roles are recognized and separate responsibilities respected, and that professional decision-making is not delegated to anyone with less than adequate training;
- training and opportunities for educational development are provided to employees and volunteers in order to encourage personal growth and foster the mission of the museum;
- those involved in gifts of art objects to the Museum are familiar with IRS Publication 526 dealing with the valuation of donated property, especially as it concerns the material related to charitable gifts of art objects and the appraisal requirements as described in the instructions in IRS Form 8283;
- the Museum will seek outside professional expertise, if such expertise is not available on staff or at the University;
- staff and volunteers will be courteous and reasonable and remain objective in their professional relations;
- staff has an obligation to share knowledge and professional

expertise, to render professional services, and to credit colleagues from whom they have learned. However, staff will not accept outside work for pay without disclosure and consent from the Executive Director as well as others as required by University policy, nor will staff engage in outside employment or consulting, if there appears to be a conflict of interest between such activities and the performance of their responsibilities within the Museum;

- all those associated with the Museum have an obligation to protect confidential information regarding donors, security, private collections, and negotiations and confidences shared in the course of Museum duties;
- except as set forth in University policy, ownership of any materials written, designed or produced, and financial remuneration for the sale or lease of such materials created while the staff member is paid by the Museum and is on official Museum time is the property of the Museum. Members of the museum profession, although entitled to a measure of personal independence, must realize that no private business or professional interest can be wholly separated from their employing museum institution. Therefore, a staff member should discuss ownership and remuneration of work created outside regular staff time with his/her supervisor before working on such materials. See UO policy in this regard:
<http://policies.uoregon.edu/policy/by/1/03000-human-resources/potential-conflicts-interest>;
- the Museum complies fully with all legal obligations, in relation to international, national, regional, and local laws or treaty obligations, and with any legally binding trusts or conditions relating to any aspect of the Museum's collections or facilities. This applies to such laws at the U.S. Copyright Act and professional standards for "fair use" in print and on the Internet; and
- The Museum complies with the American Association of Museum's recommended procedures for providing information

to the public about objects transferred in Europe during the Nazi era by posting images and information about such questionable works on the AAM's Nazi-era Provenance Internet Portal (<http://www.nepip.org/>).

Public Programs

The staff and volunteers of the Museum serve society by advancing an understanding and appreciation of the global culture through exhibitions, research, scholarship, publications, and other educational activities. These programs further the Museum's mission and are responsive to the concerns, interests, and needs of society and the University community. Thus, the staff and volunteers will ensure that:

- programs are consistent with the museum's mission and resources;
- exhibitions and other public programs support the museum's mission and public trust responsibilities;
- programs are founded on scholarship and marked by intellectual integrity;
- programs are accessible and encourage the participation of the widest possible audience;
- programs respect pluralistic values, traditions, and concerns; and
- programs promote the public good rather than individual financial or other personal gain.

Collections

All Museum staff, volunteers, adjunct and guest curators, students, and those faculty members who require access to or use of the collections commensurate with their duties and responsibilities will exercise the highest levels of stewardship. This stewardship over the collections entails the highest public trust and carries with it the presumption of rightful ownership, permanence, care, documentation, accessibility,

and responsible disposal. Thus, the staff, volunteers, adjunct and guest curators, students, and faculty members cited above will ensure that:

- all collections in the Museum's custody support its mission and public trust responsibilities;
- collections are protected, secure, unencumbered, cared for, and preserved according to professional standards;
- collections are accessible and utilized for the creation and dissemination of knowledge without placing the collection at risk;
- acquisition, disposal, and loan activities are conducted in a manner that respects the protection and preservation of cultural resources, conforms to the Museum's mission and public trust responsibilities, and does not violate the laws of the U.S. or other nations regarding trade in such objects;
- acquisition, disposal, and loan activities conform to the Museum's mission and public trust responsibilities, promoting the public good rather than individual financial gain;
- disposal of accessioned collections through sale, trade, or research activities is solely for the advancement of the Museum's mission and in accordance with University policy. Proceeds from the sale of collections are to be used consistent with the mission of the Museum and for expansion of the collection;
- disposals are made to parties not associated with the University or Museum, whenever possible at public auction or by gift to or exchange with a non-profit organization. Except as provided by Oregon law, no person associated with the University or the Museum or his/her representative may acquire any item from the collection other than through public auction;
- when acquisitions from persons associated with the University or Museum are advantageous and are clearly in support of the Museum's mission, reasonable steps are taken to ensure an arms-length transaction, including appraisals from independent, competent, and certified appraisers;
- employees of the Museum will not give formal appraisals on objects in the acquisition, disposal, or lending processes;

- staff should be circumspect in referring members of the public to outside suppliers of services, including appraisers, conservators and framers. More than one qualified source should be provided at all times so that there is no appearance of favoritism.
- written collection policies and procedures exist and that they are properly approved by University administration and that such procedures are followed, and that they are reviewed regularly;
- archaeological material will not be acquired, borrowed, or exhibited from any other collection without reasonable proof that its removal has not caused damage or destruction to the original site/monument, or if its removal from the original site/monument involved less than proper and legal disclosure to the owner or to the appropriate agency with governmental oversight;
- the unique and special nature of human remains and funerary and sacred objects is recognized as the basis of all decisions concerning such collections;
- the discovery of the possession of objects or requests for return of objects exported in violation of the 1983 UNESCO convention should be considered with care and respect and with intent to negotiate a return or cooperative solution to the dispute;
- the Museum remains in compliance with the Native American Graves Protection and Repatriation Act (NAGPRA), which mandates that museums and universities inventory their collections and repatriate certain materials, including human remains and funerary objects, to Native American tribes upon request, and that it maintains positive, open relationships with appropriate representatives of Native American groups; and
- the 1954 Hague Convention (Armed Conflict) is honored by refusing to acquire cultural objects removed from occupied countries.

INTERPRETATION OF THIS CODE OF ETHICS

Problems of compliance and interpretation of this code of ethics should in all cases be addressed to the Executive Director. Actual or perceived non-compliance by the Executive Director should be referred to the Executive Director's superior. The Executive Director will form a temporary committee as needed to periodically review and revise this code of ethics.

Approved by President Richard Lariviere

Approved by President Richard Lariviere



Signature

Date

Approved by Vice President for University Relations Michael Redding



7/29/10

Signature

Date

Approved by Senior Vice President and Provost James Bean



8/1/10

Signature

Date

Appendix F

JSMA DEACCESSION PROCEDURES

1. The Curators and Executive Director will determine whether an object may be considered for deaccessioning based on the guidelines provided in the Deaccession Policy. The Curators will present the deaccession proposal to the Executive Director for approval prior to beginning the formal procedures.
2. The Curators will initiate a Recommendation for Deaccession Form for each item or group of related items. This full written justification includes an evaluation of the object's art historical significance and its position in the collection. The Curators will complete the sections that identify the item, discuss provenance, valuation, reasons for deaccessioning, and disposition.
3. The Executive Director must review the recommendation forms and give approval to proceed with all deaccession candidates.
4. The Collections Management Department will examine the object's records to determine whether the Museum has clear and legal title and will review donor information with appropriate staff. If the proposed deaccession candidate was a gift, the Curators will examine its historical and donor files for any information about the gift and its donor that may influence the decision to deaccession.
5. In the case of unencumbered gifts the Curators will make reasonable efforts to contact donors, their heirs, or executors, to inform them of the proposed deaccession, but such action will not be construed as a request for permission to deaccession nor as an attempt to return the object. Prior to contacting any donor the Executive Director and the Director of Development will be contacted. If there is a legal question, the University of Oregon's legal counsel will be consulted. If the object is by a living artist, the JSMA will attempt to contact him/her. A reasonable effort to contact a donor whose gift occurred within thirty years of the deaccession date, may include but is not limited to an Internet search, review of obituary records at the courthouse, or telephone directory records at the local historical society. If a deaccessioned object was given more than thirty years prior, an attempt to contact or locate the donor or their heir is sufficient (e.g. Internet search).
6. The Museum will contact faculty members at the University whose fields of expertise relate to the object(s) and who have used or might in the future use the object(s) in their research and teaching. If the object(s) are not deemed of sufficient pedagogical value by the faculty members contacted, the Museum will proceed with the next step in its deaccessioning protocol.
7. The Museum will seek a written opinion of the recommendation to deaccession from an outside expert for significant objects. Evaluations based on photographs will not be accepted for the purposes of deaccession. If the reason for deaccession is condition, a conservation report may accompany the Recommendation for Deaccession Form.
8. One or more outside appraisals for objects of value are recommended especially those that might be sold or traded.
9. The Executive Director will review all proposed deaccessions prior to the Collections Committee presentation.
10. The deaccession must be presented to the Collections Committee by the Curator of Collections or the Executive Director. Once the Collections Committee votes to recommend the deaccession, the Museum will review the deaccessioning recommendation with the Provost and acquire his/her written approval.
11. Each deaccessioned object may be disposed of in a means appropriate to the item. In many cases this will be by public auction, but some objects may best be disposed of by transferring them to another institution or in cases of objects beyond reasonable repair, the JSMA may wish to destroy them. In conformity with the American Association Museum of Directors (AAMD) policy, disposal will not take place in a way that creates a conflict of interest for the JSMA. As is applicable to all staff, trustees, and volunteers of the JSMA, directly or indirectly purchasing an object that is being deaccessioned by the JSMA is a violation of the Code of Ethics. In the cases of stolen, forged, or

- misrepresented objects, the Curators and Executive Director will determine their proper disposition. For purchases, the JSMA may seek a refund, credit, or exchange from the dealer. In general, the Curators in whose area the deaccession falls will recommend a means of disposal and supervise the disposal. The Collections Management Department will implement the disposal and keep the Executive Director and Curators informed.
12. In conformity with AAMD policy, the funds received from all sales of objects will only be used to strengthen the permanent collection. First priority will be given to purchase objects from the same period or culture, if this is an area in which the Museum is actively collecting. If not, funds will be used to acquire objects in its highest priority areas.
 13. Objects acquired for the collection through deaccession will be credited to the original donors as follows: Gift of [donor's original credit] by exchange.
 14. The Collections Management Department will document the deaccession in the permanent object records and in the collection management database (Mimsy XG). A photograph must be on record prior to its disposal. The completed Recommendation for Deaccession Form (including the amount realized from sale) will become part of the object's permanent historical file.

Appendix G

JSMA INCOMING LOAN PROCEDURES

1. The decision to borrow objects is made by a Curator or the Executive Director.
2. Formal loan requests are sent to lenders by the Curator or the Executive Director outlining the purpose and additional locations (if applicable) for the loan.
3. The Collections department will send a Standard Facility Report and any additional information if requested by the lender.
4. The organizing Curator or lender will provide the Collections department with all relevant checklist information and images for formatting and distribution in the museum. The collections manager may request additional high resolution images from the lender for PR/marketing purposes and secure any copyright permission.
5. The Collections department is responsible for generating loan agreements and will review the lender's loan conditions to ensure that the JSMA can meet all requirements outlined in the agreement. If the lender agrees to use the JSMA's Property Loan Agreement, the collections department will send the lender an agreement for signature. Once the Collections department receives the signed agreement from the lender, the Executive Director will sign the agreement. The Collections department will submit the agreement to UO Purchasing and Contracting Services (PCS) for approval. Generally, this process may take up to two weeks.

In the event that the lender requires use of their own loan agreement, the Collections department will submit the unsigned loan agreement to PCS for review and approval. PCS may revise or amend the agreement according to state laws. If the agreement is between two state agencies the agreement will need to be processed by additional offices such as the Oregon Department of Justice and/or the Oregon Research Services Administration (ORSA). This process may take longer than two weeks.
6. Upon receipt of the completed and signed loan agreement, the Collections department will issue a certificate of insurance (or certificates of indemnity in cases where the exhibition is indemnified), and will coordinate all transportation and courier logistics (incoming, intervene, and outgoing).
7. Upon arrival, the loans will acclimate to the JSMA's environment in the secured storage spaces for at least 24-hours prior to unpacking. Once unpacked, the Collections department will examine and document the objects and generate an incoming condition report with images. In the event that damage occurs to a loaned object—either during shipping or while at the JSMA—the Collections department will notify the lender as well as the insurance carrier immediately. The Collections department will document and photograph the damage and a report will be sent to the lender together with a treatment proposal, if applicable.
8. The Collections department will issue the appropriate Incoming Receipt and Outgoing Release, and document the loan in the collection management database (Mimsy XG), as well as in the relevant paper loan file.
9. The Collections department together with the Security department is responsible for the security of all loans while on the JSMA's premises. All loans will be held in secure and climate- controlled storage or exhibition areas.
10. The Collections department together with the Prep department will determine how best to secure and exhibit the loans in direct fulfillment of the lender's requirements.
11. The Collections department is responsible for the safe unpacking/packing and installation/deinstallation of all loans. Lender requirements must be noted and distributed to all appropriate museum departments in advance, and followed. The JSMA will endeavor to exercise the same care with respect to loans as it does in the safekeeping of its own property. Lender requirements for the care of the lender's object(s) supersede those of the JSMA. Should the lender and the JSMA determine in writing that requirements other than those generally in use at the JSMA are acceptable to both parties, said conditions will prevail.
12. Long-term loans to the JSMA are generally subject to a one-year loan-renewal period.

Renewals are reviewed routinely. For loans subject to renewal, the Collections department will contact the lender in writing and should the lender approve the renewal, issue a new or extended loan agreement and certificate of insurance (with an adjusted value, if warranted).

13. Lenders to the Museum will be listed in the Annual Report.

Rev. 8/2010

Appendix H

LOANS TO MUSEUMS

358.415 Definitions for ORS 358.420 to 358.440. For the purposes of ORS 358.420 to 358.440:

- (1) "Loan," "loaned" and "on loan" include all deposits of property with a museum that are not accompanied by a transfer of title to the property.
- (2) "Museum" means an institution located in Oregon that:
 - (a) Is primarily educational, scientific or aesthetic in purpose;
 - (b) Owns, borrows or cares for, and studies, archives or exhibits property; and
 - (c) Is operated by a nonprofit corporation or public agency.
- (3) "Property" includes all tangible objects, animate and inanimate, under a museum's care that have intrinsic value to science, history, art or culture, except that it does not include botanical or zoological specimens loaned to a museum for scientific research purposes. [1985 c.580 §1; 2005 c.22 §256]

358.420 Status of property loaned to a museum; statute of limitations on recovery. (1) No action shall be brought against a museum to recover property on loan to the museum when more than 25 years have passed from the date of the last written contact between the lender and the museum.

(2) Property on loan to a museum shall be deemed to have been donated to the museum if no action is filed to recover the property within seven years after the museum gave notice of termination of the loan as provided in ORS 358.425 and 358.430.

(3) Property on loan to a museum shall not escheat to the state under ORS 112.055, but shall pass to the museum if no person takes under ORS 112.025 to 112.045. [1985 c.580 §2]

358.425 Notice of termination of loan; content. (1) A museum may give notice of termination of a loan of property at any time if the property was loaned to the museum for an indefinite term. If the property was loaned to the museum for a specified term, the museum may give notice of termination of the loan at any time after the expiration of the specified term.

- (2) Notices given under this section shall contain:
- (a) The name and address, if known, of the lender;
 - (b) The date of the loan;
 - (c) The name, address and telephone number of the appropriate office or official to be contacted at the museum for information regarding the loan; and
 - (d) Any other information deemed necessary by the museum. [1985 c.580 §3]

358.430 Procedure for giving notice; responsibility of owner. (1) To give notice of termination of a loan, the museum shall mail a notice to the lender at the most recent address of the lender as shown on the museum's records pertaining to the property on loan. If the museum has no address in its records, or the museum does not receive written proof of receipt of the mailed notice within 30 days of the date the notice was mailed, the museum shall publish notice at least once a week for three consecutive weeks in a newspaper of general circulation in both the county in which the museum is located and the county of the lender's address, if any.

(2) For the purposes of this section, if the loan of property was made to a branch of a museum, the museum is located in the county where the branch is located. Otherwise, the museum is located in the county in which it has its principal place of business.

(3) It is the responsibility of the owner of property on loan to a museum to notify the museum promptly in writing of any change of address or change in ownership of the property. [1985 c.580 §4]

358.435 Status of title to acquired property. One who purchases property from a museum acquires good title to the property if the museum represents that it has acquired title to the property pursuant to ORS 358.420. [1985 c.580 §5]

358.440 Notice to lenders. When a museum accepts a loan of property, the museum shall inform the lender in writing of the provisions of ORS 358.420 to 358.440. [1985 c.580 §6]

Appendix I

JSMA Outgoing Loan Procedures

1. THE E.D. AND/OR CURATORS RECEIVE A LOAN REQUEST IN WRITING FROM THE BORROWING INSTITUTION AND WILL INITIATE THE IN-HOUSE PROCESS BY COPYING THE REGISTRAR
2. THE REGISTRAR WILL CREATE A LOAN FILE AND PERFORM THE FOLLOWING TASKS WITHIN A REASONABLE TIME:
 - A. REQUEST, RECEIVE, AND REVIEW THE BORROWING INSTITUTION'S FACILITY REPORT
 - B. ASSESS THE OBJECT(S) CONDITION FOR STABILITY, NOTE CONDITION ISSUES, AND MAKE CONSERVATION RECOMMENDATIONS IF NECESSARY FOR LOAN
 - C. IN CONSULTATION WITH THE MUSEUM PREPARATOR, MAKE FRAMING, MATTING, INSTALLATION, DISPLAY AND MOUNT REQUIREMENTS
 - D. MAKE CRATING, PACKING, AND SHIPPING REQUIREMENTS
 - E. SUBMIT FINDINGS TO THE E.D. AND/OR CURATOR
3. THE E.D. OR CURATOR WILL NOTIFY THE BORROWING INSTITUTION IN WRITING OF THE FINAL DECISION AND REQUIREMENTS BASED UPON THE FINDINGS OF THE REGISTRAR AND REQUEST THE BORROWER TO SEND THEIR LOAN AGREEMENT FORMS TO THE REGISTRAR FOR SIGNATURE PROCESSING
4. A COPY OF THE LOAN APPROVAL IS SENT TO THE REGISTRAR FOR THE LOAN FILE
5. THE REGISTRAR WILL GENERATE AND/OR PROCESS THE LOAN AGREEMENT FOR SIGNATURE APPROVAL THROUGH UO CONTRACTING
6. THE REGISTRAR WILL WORK WITH THE BORROWER TO COORDINATE CRATING, TRANSPORTATION, AND ANY/ALL REQUIREMENTS PRIOR TO RELEASE
7. THE REGISTRAR WILL OBTAIN RECEIVE A CERTIFICATE OF INSURANCE PRIOR TO RELEASE
8. THE REGISTRAR WILL GENERATE CONDITION REPORTS OF ALL OBJECTS BEING LOANED
9. THE REGISTRAR WILL GENERATE AN OUTGOING RELEASE UPON RELEASE OF THE LOAN AND SUBMIT TO THE BORROWER FOR SIGNATURE ALONG WITH THE CONDITION REPORT(S)
10. ALL DOCUMENTS PERTAINING TO THE LOAN AND RELEASE ARE KEPT IN THE LOAN FILE IN THE REGISTRATION DEPARTMENT

Appendix J

The following are sets of basic rules offered with the understanding that competent art handling is an attitude as well as a skill. The most rigorous rules are worth little if they are not applied with steady and careful attention to the needs of the object. When handling any work of art, treat it with respect. You should approach every object as if it were the most important item in the collection.

General Guidelines

Follow supervision. Make sure all team members know from the beginning who is in charge in a given situation. **THINK** before you act. **PLAN** before beginning any movement. Establish a clear plan and path for each movement through team consultation before any action is taken. Make sure enough staff is involved for safety. Make sure you understand exactly what will be done with an object before you move it. Each piece should be analyzed individually, and any idiosyncrasies of the material taken into account. By all means, ask questions.

Dress

To maintain a professional atmosphere, it is important to dress appropriately for the type of work that is done in the collections department. Clothes should allow you to move freely as you may be called on to lift or otherwise handle heavy objects. Shoes should be solidly constructed, preferably leather rather than cloth, and cover your toes. This will help protect your feet from heavy objects or the wheels of moving carts. A good tread on the soles of the shoes is important to keep slipping to a minimum.

Remove museum staff ID tags and watches when handling art. Dangling or protruding accessories like bracelets, necklaces, and buckles should not be worn when handling artworks as they may scratch or snag an object.

Have Clean Hands, Wear Gloves

Keep your hands clean, even when using gloves (cotton or nitrile). Do not use hand creams and lotions. These can leave deposits that may cause damage and attract soil. Use clean gloves only; soiled gloves can cause as much damage as soiled hands.

At times, gloves may not be the best decision as some objects are very slippery (some glass, some highly glazed ceramics, some sculpture) or the object's surface texture or protruding parts will cause gloves to catch.

No Sharp Objects, No Ink

Keep sharp objects (scissors, screwdrivers, etc.) away from the art. Do not use pens or felt markers when filling in forms in the vicinity of objects.

Keep work areas and pathways clean, clear, and safe for both people and the art. Be proactive in helping to keep storage facilities clean and safe.

Don't Rush

Take your time. Move slowly and deliberately while carrying or moving objects. Unless one person can *easily* manage an object, two people must handle it. This applies to size as well as weight of an object.

Refuse to undertake any move if you feel that you have insufficient manpower or that other considerations make the operation unduly hazardous. Too many hands are as dangerous as too few.

Take breaks. Do not continue to handle objects when you are fatigued.

The Less Handling The Better

Handle objects as little and as infrequently as possible. Handle only one object at a time, and use both hands in carrying. Avoid stairs unless absolutely necessary. Use the freight elevator or passenger elevator if unoccupied.

It is almost always preferable to use a cart to transport an object rather than to carry it by hand. Bring the cart to the object instead of walking the object to the cart when transporting an object across a room and within the building.

Never overload carts. Secure every object on the cart. A-frames should have nylon straps to secure flat works to the cart. Objects on two-tiered wheeled carts should be secured with padding or sandbag "snakes" to cushion during transport.

Never put dissimilar objects (such as sculpture and watercolors, or ceramics and paintings) on the same cart.

Never move objects of the same general type but of vastly different size, weight or materials together.

Never discard packing materials before searching them thoroughly for fragments that may have dropped off in transit.

Never leave objects sitting directly on the floor. Use carpet blocks or padding (i.e. blankets).

Never engage in or encourage distracting conversation while handling objects.

Never hand off an object from one person to another; instead, set the object down and have the second person pick it up.

Never leave objects unattended in unsecured areas.

Report Damage

If damage, or suspected damage, occurs, report it immediately to one of the following staff:

1. Collections Manager or Registrar
2. Curator
3. Associate Director

Do not attempt to restore or repair the object. Save and report anything found in storage or a gallery that might have come off the object. If a staff member listed above is not available, fill out a Damage Report form and turn it in to the Collections Manager. A sample of the form is attached to this document.

Discretion

Each department in the museum deals with sensitive information that is not for general discussion outside the building. Maintaining discretion on these topics is a matter of security and respect for lenders, donors, volunteers and staff at the museum. It also keeps the focus on the intangible qualities of the objects in our care.

Subjects not to be discussed outside of the museum and its staff:

- Monetary value of an object
- Travel details of objects
- Donor/Lender contributions
- Security procedures
- Storage facilities

Food and Beverages

Staff with a basement office are permitted to have food and beverages at their desks with the understanding that garbage from food or drinks must be disposed of daily in the kitchen on the first floor or outside the building entirely. Food and liquids are never allowed in galleries, storage facilities, and the Prep Room. When art is present for photography in the Photography studio, food and beverages are not allowed.

Tracking Art Moves

The Collections department tracks location moves of the entire collection and loaned objects. If an object leaves its location for more than 48 hours, the location must be updated therefore an Art Movement Form must be filled out and submitted to the Collections Manager or Registrar. An example of the form is attached to this document.

If less than 48 hours, return the object to the same location you removed it from unless its storage needs have change (i.e. framed or unframed), in that case contact the Collections Manager or Registrar to assign the object a new location.

Object Handling Basics

Paintings

When moving paintings, utilize the carts and secure paintings on A-frames with strapping. Always carry and set a painting in a vertical position with the surface facing you. Before moving a painting, check to make sure the work is secure in its frame and the hanging device is stable and adequate for the weight.

Avoid touching the paint surface or the back of a painting. The image is recognized as the most valuable side of the canvas but pressure exerted from the backside can seriously weaken the structure of the painted surface. Never allow any object to rest, no matter how lightly, against either surface.

Do not carry a painting by its top or by one side or carry with one hand. Unless you have been instructed to keep a specific painting "flat" due to an unstable surface, grip one hand beneath the painting and with one hand on the side, or with one hand on either side, whichever will be more stable under the circumstance.

Avoid handling the carved or molded ornamentations on a frame, as these areas are more susceptible to damage. Check the frame for old breaks and points of weakness. Gessoed and gilded frames are especially fragile; the gilded surface should not be touched. Always hold a gessoed frame by the uncarved back edge and set it on its back edge so the gesso is not damaged. A padded 2 x 4 under the back edge will prevent resting the frame on delicate carved projections.

When moving a large painting, carry it as close to the floor as possible. Lifting from the underside could raise the center of gravity sufficiently to make the painting topple. Remember that the larger the painting the more susceptible it is to distortions, such as torquing of the frame/stretcher and flopping of the canvas, so extra care is required in such cases.

Never insert your fingers between the stretcher bar and the back of the canvas or press knuckles into the back of the canvas when holding an unframed painting by its stretcher, because this may strain the canvas and causes cracks to develop in these areas. Always lift the painting as outlined above.

Store framed paintings on painting racks. If framed paintings must be stored in bins, keep the painting as vertical as possible setting them face-to-face and back-to-back. Use padding such as blue board or corrugated cardboard, fully spanning the paintings, to separate and protect them. Be mindful of protruding hanging devices when storing paintings in bins with other paintings. Flatten D-rings against frame.

When resting a framed painting on the floor, use skid-proof blocks or padding to raise it above the floor at least two inches and arrange the paintings face-to-face and back-to-back.

Works on Paper

While special procedures are necessary when dealing with unmounted or unframed works on paper, the handling of them in frames is essentially the same as it is for framed paintings. Follow the same guidelines as outlined above, noting the provisions below.

Maintain viewing position. Special attention must be paid to works on paper that are hinged to a mat or a mount. The hinge indicates a specific orientation of the artwork to the frame. Setting the artwork on edge or upside down will put undue stress on the hinge. Always carry and store the print in its upright, viewing position. This is especially important with "floated" works.

Most works on paper are very light sensitive. Therefore they need to be covered with opaque paper or board to prevent unnecessary light exposure during installation. Works on paper are also extremely susceptible to changes in temperature and relative humidity. Care should be taken to avoid exposing them to drafts and heat sources.

Rules For Handling Unframed Works On Paper

Wash hands often and dry them thoroughly. Refrain from using hand lotions. Wet wipes can be used when sink facilities are not available.

Remove personal dangling accessories such as jewelry and staff ID badges.

Make sure tables surfaces are clean and that there is clean paper or blotters beneath artworks.

Use pencils only next to works on paper. Tools, if needed, should be confined to a tray.

Use soft (seamstress type) measuring tapes rather than metal tapes and rulers.

Never use tape on or near a work on paper.

Always hold paper with two hands! One-handed holding can easily cause handling dents.

To transport multiple artworks, place groups in a solander box on a cart. While cart transport is always preferred, individual artworks may be moved a short distance if a firm support (such as blue board or foam core) is placed beneath.

Be careful not to drag anything (the corner of a mat or glassine for instance) across the artwork's surface.

Take special care in handling fragile media such as pastels, mezzotints, silkscreen prints, photographs, artworks on thin or brittle paper, and those adhered to old boards.

Lift unmounted works on paper by opposite corners (i.e. upper-left and lower-right corners). If it is difficult to lift a work on paper without bending or creasing the corner, use a micro spatula or folded paper pieces to lift a corner so it will be easier to grasp as well as to avoid finger marks. Use a folder or a sheet of mat board to turn artwork over.

Unmatted artworks should not be stacked on top of each other, but should be separated by smooth, clean, acid-free paper or folders.

Carry works on paper flat on an object cart and use blue board as base or enclose the artworks in a solander box.

Matted Artworks

Open matted artworks from the outside corner, never by a finger through the window.

Open mats slowly so that static cling does not lift up a light sheet and tear or dent it.

Lift interleaving paper (glassine or tissue) carefully to avoid scratching artwork surface. This is especially important with photographs and serigraphs.

When lifting an artwork at its back, beware of stuck hinges. Lift slowly.

Take care that stacking does not result in teetering piles, bent artworks, mat corners jutting into the windows of matted artworks below, or too much pressure being put on the artworks on the bottom of the pile. Do not stack upside-down.

Never pull an artwork from a pile without first removing the other artworks.

A sheet of glassine or tissue paper should cover the work exposed by the window in the mat.

Scrolls

Either silk or paper is the support for paintings on scrolls, which both materials are easily damaged by finger oils so gloves must be worn. Scroll paintings are also delicate and need to be well supported. Transport a scroll rolled and on a cart.

Unroll a scroll painting on a flat surface that is large enough to contain the length of the scroll. Do not pull taut or stretch the scroll as it may tear. Because it is important that the appropriate amount of tension be used in rolling a scroll, only an experienced person should re-roll a scroll. Scrolls are fastened into a roll with ties. The knots that keep the ties closed are made using specific techniques. Again, an experienced person should make the knots. Store the scroll in its original box if possible. Otherwise, wrap scroll in tissue as a first layer and a thin sheet of ethafoam as a second layer of protection.

Objects

Study the object's condition and construction **FIRST**. Know exactly how an object is to be handled before beginning movement. The object's size, shape, weight, and its attachment of parts must dictate the method of movement. If in doubt about the fragility or weight of a particular piece, check with the Collections Manager, Registrar, or Curator before attempting to move it. Pay special attention to ethnographic objects, as their construction can be unexpected.

Move one object at a time regardless of size.

Remove personal dangling accessories such as jewelry and staff ID badges.

Always wear clean gloves (cotton or disposable nitrile) unless the surface might catch on the fabric of the gloves or is too slick to be safe. In those cases, make sure your hands are clean and dry.

Use carts, dollies, and trays. Try to use carts rather than walking long distances with an object. Heavy sculpture in particular must always be transported on properly padded carts or dollies and should be tied down or otherwise completely secured. Protect sculpture in transit with clean blankets, pads, or cushions. If tied to the cart or dolly, pad the areas where the rope or straps come in contact with the object. **NEVER** allow sculpture to touch anything except padding – especially another work of art. Trays may be used for smaller objects. Ensure that these are adequately padded so there will be absolutely no shifting in the tray or on the cart. **DO NOT OVERCROWD** carts or trays.

Store in locations that are stable, safe, and easily accessible. Avoid hard-to-reach areas, like high shelves that don't have easy access, trafficked areas, or areas with any danger of objects falling.

POLISHED SCULPTURE & METAL OBJECTS

Wear white cotton gloves, except when handling highly polished sculpture (when there is a danger of insecure grasp). Nitrile gloves may be used when the object is friable, such as wood and ivory. Make sure that your hands are clean and dry if using bare hands when gloves are not ideal.

Gloves must be worn at all times when dealing with metal objects, as your fingerprints can eat into the metal surface, due to the salt content in perspiration. This may not be evident immediately, but in a few months a very clear imprint will be visible and etched into the surface of the metal.

IVORY, CERAMIC, GLASS, STONE

Pad ivory objects when moving them from one area to another to protect them from sudden changes of temperature caused by drafts when passing open doors. These objects are very fragile.

Distribute weight evenly. Stone, ceramics, and glass objects might shatter if placed down abruptly or if their weight is not even when resting on a cart or other surface.

Always lift by the strongest part. Never drag or push an object. Always lift by point of greatest structural strength. Never handle or lift a sculpture by a projecting member, such as an arm, head, handle, or lid. These may require special padding. If repairs or damage is evident, avoid these areas when handling.

Use one hand to support the object from below and steady the object with the other on one side near the bottom. This applies to all small objects.

Stone may be heavy, so it may take more than one person to lift the object. Stone can also be brittle. Hold smaller objects gently to avoid breakage. Transport stone objects on carts. Large objects can be wrapped with a blanket for protection.

FURNITURE

With furniture, check for loose or hinged parts such as doors, leaves, etc. These may require tying down with soft cords or cloth before the object can be moved. Hold chairs from beneath the seat or seat rail, chests from the bottom, and tables by the counter.

Furniture should always remain in its intended position. **NEVER** transport on its side or upside down. Pad furniture edges and projections when carrying furniture through doorways or other areas where it may be bumped.

Be careful when moving objects with bases. Make sure that the base is firmly and securely attached to the object before moving takes place. If it is loose, remove it from the object before moving, and move as two separate pieces.

If an object becomes chipped or broken during movement, all fragments should be carefully collected and preserved, no matter how small. Any change in condition during movement, however slight, should be reported immediately to the Collections Manager, Registrar, or Curator who can offer guidance before any further movement is attempted.

When storing furniture or wood objects protect it from dust with a breathable material such as tyvek or muslin.

Folding screens are made of either silk or paper held in hinged wood frames. Since the screen may also contain paintings, it is important to wear gloves when handling it. To

carry a screen, lift by its frame. Be careful not to grip the paper backing or a puncture may result. When transporting a screen, lay it flat on a cart.

Stored screens should be wrapped in protective muslin or cotton covers. Tissue paper can be used to separate the paintings of a folded screen. To avoid compressing painted panels, screens should be stored vertically.

Textiles

Hands should be washed before handling to remove not only collected soils, but also natural body oils as well, which will result in deterioration of the textiles. For this reason, hand lotion should **NOT** be used and fingernail polish should be removed. If for some reason the latter is not possible, wear gloves.

Remove all rings, bracelets and watches, dangling necklaces and hanging ID badges because these carry soils and can sometimes catch on textiles causing snags and general physical wear.

Use pencils and do not use pens or markers in the vicinity of textiles. The dry-cleaning solvents capable of removing ink stains are usually too harsh for use on fragile textiles. Use pencils and avoid brushing any eraser crumbs onto the textiles.

Use soft (seamstress type) measuring tapes rather than metal tapes and rulers.

Do not use adhesives or sticky tape in conjunction with textiles.

Always support each textile in transit in order to minimize stress and strain. Use an acid-free board on carts or flatbeds. Always make sure textiles are put down on clean surfaces and avoid excessive stacking. If the textile is large, use two or more people to move it.

Roll quilts, blankets, rugs, etc. face side out on a storage roll of sufficient diameter and fully support the roll when carrying it (i.e. on a rod through the roll). If hanging devices are attached or planned, roll the textile so the end to be hung is on the outside of the roll.

When moving rolled textiles, lift and carry the roll by the uncovered cardboard at each end. If the textile extends to the ends of the roll, carry the roll on a poll.

Avoid exposure to strong light and sources of heat and ultraviolet (UV) as well as drafts and doors opening into non-gallery spaces.

If textiles are left out for any period of time during an installation/de-installation protect them from light and dirt by covering with clean sheets of acid-free tissue. Position stanchions around the area.

Save all loose threads, fragments, beads, etc. that may come off during handling. Put them in a container (envelope, bag, etc.) and label with the accession number before returning them to the Collections Manager or Registrar.

Textiles are easily soiled so they should be covered with clean tissue or muslin when transporting them. Keep it in its box or use a rigid mount (blue board or coroplast) for ease of handling. Carefully observe buttons, fringe or other attachments to the textile so as to avoid catching them.

Pad all folds in a textile with acid-free tissue to avoid creasing. Protect folded textiles from dust in acid-free boxes on metal shelving. Protect hanging or rolled textiles with muslin shrouds. It is important to allow airflow to textiles in order to prevent molding and mildewing or permanent creasing so never use plastic to store textiles.

Refold textiles occasionally to prevent permanently creasing the cloth. Folds should be padded with fresh acid-free tissue, creating "sausages" for volume.

ART MOVEMENT FORM

<u>Object Details</u> JSMA Accession No. _____ Title/Object Name/Description: _____	
Moved From: _____ Moved To: _____ Moved By: _____ Date Moved: / /	Reason: INSTL DINSTL PREP
<u>Object Details</u> JSMA Accession No. _____ Title/Object Name/Description: _____	
Moved From: _____ Moved To: _____ Moved By: _____ Date Moved: / /	Reason: INSTL DINSTL PREP
<u>Object Details</u> JSMA Accession No. _____ Title/Object Name/Description: _____	
Moved From: _____ Moved To: _____ Moved By: _____ Date Moved: / /	Reason: INSTL DINSTL PREP

Submit completed forms to the Collections Manager or Registrar

DETACH, SIGN, AND RETURN THIS PAGE

Please sign and give this page to the Collections Manager after you have read the Art Handling Guidelines. Retain the document for your reference.

I have received and read the JSMA Art Handling Guidelines. If I am unable to perform the duties as outlined in this document I will alert my superior(s) immediately.

Position Title _____

Name (print) _____

Signed _____

Date _____

Museum collection management viewpoints and methodologies are routinely evaluated and updated by museum professionals. This document is updated periodically by the Collections Manager to reflect to current best practices and museum standards. Your proactive research, advice, and knowledge in any of the areas mentioned in this document is welcomed and considered for inclusion in an updated version.

Appendix K

JORDAN SCHNITZER MUSEUM OF ART

EXHIBIT A

The Museum does not have decorations. Do you plan to bring decorations or display work? How may we help?

Flowers must come from a commercial greenhouse (not yards or home gardens). Delivery times must be confirmed by events coordinator.

Hanging lights and/or wall decorations must be approved in advance.

Rearranging of art exhibits or display cases is prohibited.

All tables and chairs brought from outside the museum must be approved in advance.

Candles are not permitted. Special flameless candles are available for rent. Please ask events coordinator for information.

Food and beverages are allowed in the public spaces of the Lobby and PLC Memorial Courtyard. Food and beverages are not allowed beyond the doors to the upstairs galleries, in the elevator, and first floor hallway galleries.

Photographs/video are allowed in the public spaces on the main floor any time. Photographs/video are allowed in the galleries only with written permission by the associate director.

Bands and performing groups need prior approval. Bands must schedule a meeting with the museum's events coordinator prior to the event.

Renter should secure a dance floor to place over carpet if dancing is included in the program. The Lobby can be used for dancing when the Museum is closed to the public.

No backpacks or other large personal belongings are allowed. Lockers and coat hangers are available.

No weapons are allowed in the building.

Provide a guest list of your party to the events coordinator on behalf of Museum Security. Security needs to know who is in the museum after hours and would like to receive the guest list a day prior to the event.

Special events that include minors (younger than 21 years of age) must have a chaperone for every 25 minors.

Alcohol cannot be served to minors.

Smoking is allowed in front of the building only. Smoking is not allowed anywhere in the building or in the three courtyards.

The use of rice, birdseed, potpourri, glitter and confetti is strictly prohibited. No throwing of rice or birdseed in or around the building.

Staff areas are off-limits during public events.

The Museum reserves the right to refuse service to anyone.

Appendix L

RESEARCH APPLICATION

The Jordan Schnitzer Museum of Art provides access to its collections through a variety of programs including exhibitions and publications. Research of the collections is also permitted. In order to accommodate research at the Museum of Art, we request that individuals submit this application in advance. Applications must be specific; researchers may not “browse” through the collections, files, and records.

Researchers should be aware that some private correspondence and manuscripts are restricted and that access to them may only be possible by obtaining written permission of the author, donor, or copyright holder. Permission to examine materials does not constitute permission to reproduce or quote from material found therein.

If the Museum of Art does not possess copyright or title, authorization to quote or publish must be obtained separately. We will assist the researcher in making arrangements for publication and reproduction of works in the collections. The Museum of Art reserves the right to limit access to any material that is fragile or restricted in use by a donor or author.

SCOPE OF RESEARCH

MATERIALS YOU ARE REQUESTING TO EXAMINE

Name _____

Institution/Department

Affiliation _____

Address _____

Telephone _____ Email _____ Date _____

Reason for Policy

This policy outlines certain matters pertaining to the Jordan Schnitzer Museum of Art, specifically acquisition procedures and de-accessioning procedures.

Entities Affected by this Policy

Museum of Art

Web Site Address for this Policy

<http://policies.uoregon.edu/museum-art>

Responsible Office

For questions about this policy, please contact the JSMA at 541-346-3027.

Enactment & Revision History

Technical revisions enacted by the University Secretary on September 3, 2015.

Became a University of Oregon Policy by operation of law on July 1, 2014.

Former Oregon Administrative Rule Chapter 571 Division 51.

Policy

A. Museum Acquisition Procedure

(1) Conditions. Because the Jordan Schnitzer Museum of Art's collections are vital to its usefulness and continued excellence, all acquisitions shall meet certain conditions:

(a) They should meet at minimum the criteria of quality reflected in the best objects now in the Museum's collections;

(b) They should be relevant to the purposes and functions of the Museum, which include support for the institution's teaching and research in the visual arts as outlined in the University of Oregon Policy Statement "Jordan Schnitzer Museum of Art Mission," so as to strengthen those collections in which the Museum specializes and for which it is recognized by scholars and artists;

(c) Because the Museum must be able to provide proper storage and care of the objects accessioned into the collections, no object will be accepted which cannot be properly cared for and stored;

(d) The Museum must observe all State of Oregon, federal, and applicable international laws on acquiring imported art objects and will not, therefore, accept objects collected or acquired under questionable or illegal circumstances. The Museum endorses the 1970 UNESCO Convention on the Means of Prohibiting and Preventing Export and Transfer of Ownership of Cultural Property, and the 2003 American Association of Museums (AAM) recommended procedures regarding objects transferred in Europe during the Nazi Era, pursuant to an agreement reached in October 2000 by the AAM, the Association of Art Museum Directors and the Presidential Advisory Commission on Holocaust Assets in the United States;

(e) Title to objects shall be obtained free and clear of restrictions and qualifications of any type or manner, unless it is deemed by the University authorities (the President or the President's designees) in concurrence with the Museum Executive Director, the Museum Collections Committee, and the Curators to be in the best interests of the University. If an object is accepted under restricted conditions, notation of the restriction must be included in the object's permanent documentation.

(2) Criteria. Objects are added to the permanent collection by gift, purchase, bequest, exchange, or other transactions by which legal title passes to the Museum. Before accepting objects to the permanent collections, the Museum Collections Committee shall consider whether:

(a) The object to be accessioned is destined for a particular collection area. Objects not so destined shall be accepted only in rare circumstances, including but not limited to situations where it may be prudent and necessary to accept an entire private collection, even though some of the works may not be regarded as having Museum quality, in order to obtain desired works. The Museum Collections Committee shall make specific recommendations where entire collections are to be considered for acquisition;

(b) The object is unique or of greater aesthetic quality or value than similar ones already in the collections;

(c) Proper care can be given to the object;

(d) The object is in suitable condition for use and exhibition;

(e) The provenance of the object, as determined by the Director or appropriate Curator(s) is satisfactory;

(f) The object is encumbered with conditions imposed by the donor regarding use or future disposition. As a rule, only unrestricted objects should be accepted;

(g) The use of the object is restricted or encumbered by intellectual property rights (copyright, patent, trademark, or trade secret) or by its nature (obscene, defamatory, potentially an invasion of privacy, physically hazardous);

(h) The object is generally consistent with the goals of the Museum.

(3) Appraisals and Donor Tax Deductions. Gifts to the Museum are tax deductible as a charitable donation based on the fair market value of the gift evidenced and substantiated in a manner acceptable under federal Internal Revenue Service regulations:

(a) Staff members of the Museum shall not provide appraisals for donated objects;

(b) Neither the Museum, the University of Oregon, nor the State of Oregon is responsible for the authenticity and accuracy of the appraisal.

(4) Museum Collections Committee. The Museum Collections Committee is an advisory committee to the Executive Director composed of members of the Museum's Leadership Council, University faculty, and others whose expertise in art and the art world is beneficial to the Museum, in addition to its permanent and ex officio members;

(a) The permanent, ex officio members of the committee are the Museum Executive Director, Curators, and Collections Manager;

(b) The other members of the committee are appointed for three-year terms by the President of the Museum's Leadership Council in consultation with and with the approval of the Museum Collections Committee chair, the Curators, and the Executive Director. The terms of office for these appointees shall be staggered to provide for committee continuity;

(c) The committee chairperson shall be selected by the President of the Museum's Leadership Council, and shall hold this position for a two-year term;

(d) If for any reason (other than the expiration of a member's term of office) an appointed position on the committee becomes vacant, the vacancy shall be filled in the same manner as original appointments. The replacement member shall serve for the unexpired portion of the vacating member's term.

(5) Meetings of the Collections Committee shall be called by the Chairperson of the Committee in consultation with the Executive Director two to four times annually, or more frequently, if so needed. The following procedures shall be followed:

(a) For each object under consideration for acquisition, the Director or Curator shall present to the Collections Committee the documentation and provenance of the object and explain its contribution to the collection as a whole;

(b) If possible, each object under consideration by the Executive Director should be physically present for evaluation by members of the committee. If the chairperson determines that this is not possible, adequate images of the object shall be presented to the committee;

(c) Minutes of all Collections Committee meetings shall be taken and maintained;

(d) The Collections Committee may suggest and recommend to the Executive Director for purchase work deemed desirable for the collection when funds are available.

(6) The Executive Director shall make all decisions with reference to acquisitions.

(7) The Executive Director shall notify donor(s) of acceptance or rejection of objects.

B. Museum De-Accessioning Procedure

(1) Criteria. Permanent removal of objects from the collections will be done in a legal and ethical manner. The manner of disposition chosen will represent the best interests of the Museum, and the University of Oregon. An object in the Museum of Art collection can be considered for de-accessioning only if it meets at least one or more of the following criteria:

(a) It has physically or organically deteriorated beyond repair as determined by a reputable conservator; or

(b) It requires conservation, the cost of which would exceed the Museum's funds or the Museum's ability to raise the necessary monies; or

(c) It cannot be either properly stored or properly exhibited by the Museum; or

(d) It is, in the opinion of qualified outside experts, of markedly inferior quality and/or there is a duplicate or superior example of the same kind and type already in the collection; or

(e) It no longer has study, research or exhibition value; or

(f) It no longer supports the mission of the Museum; or

(g) It is determined that the work is stolen or fake; or

(h) To comply with the November 1990 Native American Graves Protection and Repatriation Act (NAGPRA) or the 2003 AAM Guidelines Concerning the Unlawful Appropriation of Objects During the Nazi Era; or

(i) Object material is potentially hazardous to human health or to other objects.

(2) Procedure. Removal of object(s) from the Museum's permanent collections can be recommended only by the Executive Director, the Curator(s), the Collections Manager, or a conservator:

(a) After such a de-accession recommendation is made, a de-accession worksheet for each object shall be begun and placed in the documentation file;

(b) A thorough search shall be made by the Museum Collections Manager of records and related University archival files to determine legal ownership as well as restrictions imposed by the donor and accepted by the Museum at the time of accessioning. Where restrictions exist as to use or disposition of the object, the Museum will observe those conditions to the extent it is reasonably possible to do so. If there are questions as to intent or force of restrictions, the Museum will seek advice of the University Office of General Counsel. New acquisitions obtained through the sale or trade of the original donated item will be credited to the donor, as a "Gift of the donor by Exchange";

(c) The qualified staff members, including the Executive Director, Curator(s), and Collections Manager, will then meet to discuss the results of this search and to propose an appropriate course of action. If all agree to recommend de-accession, the recommendation and relevant information is then presented to the Museum's Collections Committee, which shall vote on recommending the de-accession to the Executive Director. A majority vote is sufficient for such recommendation. Final authority rests with the Executive Director to determine whether de-accession should occur. The Executive Director will then inform the Senior Vice President and Provost and the Vice President of University Relations of any decisions made regarding de-accessioning. The results of any de-accession vote shall be recorded in the documentation file;

(d) Before any object can be de-accessioned and exchanged or sold from the Museum collections (whether from "permanent exhibition collections" or "study collections"), one recognized professional expert (who is neither a current nor former Museum employee), recommended by the Museum staff, shall be consulted for an opinion on the quality of the object. If the reason for the recommendation is the poor condition of the work, the expert shall be a qualified conservator in the special area of the object under consideration and should additionally offer an opinion as to the physical and economical feasibility of reconditioning the

work. This expert opinion shall be submitted in writing, dated, and kept in the permanent documentation file;

(3) Disposal. Upon approval to de-accession an object, the following procedures shall be implemented:

(a) The Museum Collections Manager shall notify the University Property Control Office and provide copies of supporting documentation to remove the object(s) from the Museum collection inventory;

(b) A written, dated appraisal from a certified art appraiser (who is neither a current nor a former Museum employee) shall be sought by the Collections Manager, Curators or Executive Director to establish current market value of the object(s) to be de-accessioned;

(c) In order that objects de-accessioned from the Museum collection may continue to serve the purpose for which they were initially acquired, an effort shall be made to place them (by exchange, transfer, or sale) in another non-profit institution. To achieve this end, such objects shall be advertised in appropriate professional publications, which may be online. Such advertisement shall clearly state that neither the Jordan Schnitzer Museum of Art, the University of Oregon, nor the State of Oregon guarantees the authenticity nor the appraised value of the work. This disclaimer shall be repeated in writing at the time of sale, transfer, or exchange. Should it be deemed appropriate and useful for teaching, the de-accessioned work may be retained by the Museum for its study collection;

(d) Sales to private parties or profit-making entities shall be pursuant to state law dealing with disposition of surplus property. Whenever possible, the work of art should be sold at public auction in a city outside Eugene. In all cases, the sales should be public, although some works of art because of their nature may be more appropriately sold in the public marketplace. De-accessioned objects shall not be given or sold to any Museum staff member or University of Oregon official whose responsibility includes Museum operations, funding, or administration, nor to their representatives or immediate families. Members of the Museum's Leadership Council and its Collections Committee also may not acquire any de-accessioned item nor may their representatives or immediate families. Proceeds from sales are to be earmarked for the acquisition of objects that will improve the Museum's collection;

(e) Exchanges of de-accessioned objects shall be for object(s) of equal or greater value to the Museum and these transactions shall be made in accordance with the procedures of the Museum's De-accession procedures;

(f) Any transactions involving a combination of object(s) and monies (given or received) shall be negotiated at the discretion of the Executive Director after consultation with the Collections Committee;

(g) Copies of records for de-accessioned objects, including provenance, research, and data on publication, and a statement authorizing removal from the Museum collection (signed by the Executive Director and the appropriate University administrators) and any other necessary documentation will be forwarded to the acquiring institution (or individual) at the time of the exchange of ownership;

(h) Documentation shall be kept in donor files, showing disposition of object(s). Where feasible, the exhibition label on object(s) acquired through exchange of a donation, or with funds derived from the sale of a donation, shall credit the donor of the exchanged or sold gift. Original records for de-accessioned objects will remain on permanent file in the Museum Collections office, with the de-accession work sheet showing completion of all steps in the de-accession process, including record of means of disposal, new ownership, and the original document showing Museum and University approval of the de-accessioning and the Executive Director's authorization. Cross-references will be placed in catalog card files;

(i) The Museum Collections Manager shall initiate procedures to remove de-accessioned objects from the computer inventory records.

Related Resources

N/A