

DEPARTMENT OF THE INTERIOR  
**DEPARTMENTAL MANUAL**

Museum Property Handbook  
(411 DM, Volume I)

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Chapter 2 Planning for Museum Property Management

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**A. PLANNING FOR MUSEUM PROPERTY MANAGEMENT**

1. Introduction

The preservation, protection, documentation, and management of museum property requires a thoughtful program designed to provide appropriate, long-term care for museum objects. Programming that ensures the efficient use of funds and available staff time is based on sound planning. This Chapter elaborates on planning requirements identified in the Departmental Manual (411 DM 2.1) and in applicable laws and regulations listed in Appendix A.

Each bureau must ensure that planning standards are developed to meet and maintain Departmental museum property management standards. As part of this planning process, the Department has developed certain mandatory plans, reports, and procedures, and additional optional plans and procedures, that ensure and facilitate appropriate museum property management. For these mandatory and optional plans, reports, and procedures, Section B of this Chapter provides definitions, and Section C provides an easy-to-reference checklist. Museum property management is an ongoing process, not a one-time effort.

The final step in the planning process is to ensure that the actions and costs identified as necessary to sustain museum property management are included in bureau and unit programming documents. Such documents should be inserted into the bureau's programming and budgetary processes. Refer to Chapter 14, "Programming, Funding, and Staffing" for additional guidance.

**B. DESCRIPTION OF MUSEUM PROPERTY PLANS, REPORTS AND PROCEDURES**

1. Mandatory Plans and Reports at the Unit Level<sup>1</sup>

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<sup>1</sup>The Department of the Interior Departmental Manual defines "unit" as a bureau organizational entity (e.g., administrative unit, office, park, center, laboratory, repository, site, refuge,

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a. Scope of Collection Statement (SOCS)

The SOCS is a brief document that clearly defines the scope of the museum property holdings at present and for the future. A SOCS is usually written at the unit level; however, a bureau may choose to write one SOCS for several units, providing information on each individual unit within the general text. For guidance on writing a SOCS, refer to Chapter 3.

b. Collection Management Plan (CMP)

This plan assesses a unit's museum property management program, identifying problems, and making recommendations for improvement. The plan focuses on such management concerns as the Scope of Collection Statement, museum records, environmental conditions in spaces housing museum property, conservation treatment needs, security and fire protection, staffing, and funding. The CMP includes the following four components:

**1) State problems you are having**

Write a problem statement addressing a specific deficiency, or a group of related deficiencies. Discuss the problem or need at a level of detail commensurate with its complexity and seriousness. Clearly identify and briefly describe the affected museum property.

**2) Describe the corrective actions you will take and list them in priority order**

List and fully describe each component of the proposed activity or project. Indicate the relationship of the proposed action to mandates and objectives. Consider

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or accountability area).

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alternative methods for accomplishing a project; for example, large projects may be phased over several years. Set an action completion date for each component. Any explanation that is necessary to justify the proposed action or to further its accomplishment may be provided.

Organize the recommended actions into two groups according to the resources needed to accomplish them. Certain actions -- those that can be accomplished with existing staff and funding -- may begin immediately. Other actions call for major investments of time and money (e.g., contracting for backlog cataloging), and require additional resources. Within each group, set priorities based on such criteria as the physical condition of the museum property and seriousness or immediacy of risk to museum objects.

**3) Identify who is responsible**

Determine who will be responsible for the corrective actions based on duration of the work, staffing and technical skills needed and whether the action will require aid from outside the unit or bureau.

**4) Estimate costs for appropriate programming and budgeting documents**

Provide a cost estimate of the proposed action. It is usually helpful to provide an estimate for each component of the action, by fiscal year. The cost estimate includes or triggers bureau-specific programming and budgeting documents that should be inserted in the bureau's programming process. Set a completion date for submission of programming documents.

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c. Emergency Management Plan for Museum Property

An Emergency Management Plan for Museum Property provides guidance in preparing for emergencies and disasters and identifies potential response options. Such plans give special attention to protecting museum property while also giving priority to human safety. Refer to Chapter 12 for guidance on emergency planning.

d. Conservation Survey (A Planning Tool)

A Conservation Survey provides information on the condition of museum property and the environment of spaces housing museum property to assist a bureau in determining conservation treatment needs and records baseline data for future assessment of deterioration. A conservation survey is conducted as needed. Although the initial survey that establishes baseline data should be conducted by a conservator, subsequent surveys may be conducted by curatorial staff who are appropriately trained to complete this task. Refer to Chapter 4 for information on obtaining a Conservation Survey.

e. Museum Property Management Survey

The Museum Property Management Survey is a tool to help you assess the status of efforts to manage museum. It documents the types and numbers of museum objects held by a bureau, their locations, and their general status. It also assesses the status of their documentation and accountability. Each unit in the Department completed a Museum Property Survey in December 1991. This survey provided baseline data against which changes in the museum property collection may be measured. The bureau can determine how often this survey will be required, but the interval between reports must not exceed five years. They must record at a minimum, the following information:

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- 1) The status of collection management documents at your unit.  
  
(Insert chart from 411 DM p. 3142)
- 2) The types (disciplines i.e., archeology, art, ethnographic, history, documents, botany, zoology, paleontology, geology, and environmental samples) and numbers of museum objects held by the unit. You may quantify document collections in linear feet instead of object counts using the formula 1,600 items equals one linear foot.
- 3) The types and numbers of your museum property that is managed in their institutions. Do not include facilities holding your museum property as short term loans.
- 4) List the names and locations of all non-bureau facilities that manage museum property for your unit.

2. Mandatory Reports at the Bureau Level

a. Bureau Plan for managing museum collections

1) **Address museum property needs**

At the bureau level you must address the needs of all bureau museum property.

2) **Define priorities**

Identify priorities that, if applicable, include, but are not limited to, managing museum property housed in federal facilities; museum property that has high informational (e.g., scientific or cultural) or monetary value is highly vulnerable to the environment; is sensitive subject matter; or

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is mandated by Federal law and/or bureau-specific authorities.

**3) Identify strategy that is bureauwide**

Identify bureauwide strategies and policies for managing museum property.

b. Bureau Museum Property Management Summary

A Bureau Museum Property Management Summary must be submitted to the Director, Office of Acquisition and Property Management by January 30 of each year. In it, you must report a bureauwide summary of your bureau's museum management activities during the preceding fiscal year. The report must be in the following outline:

**1) Summary of Accomplishments**

Summarize major highlights in implementing your bureau plan for managing museum collections.

**2) Resources**

Summarize the resources (funds and FTE) allocated or expended for managing your bureau's museum property during the reporting period.

**3) Issues**

List and describe issues that impact your ability to implement your bureau plan for managing museum collections. Describe actions you are taking to address these issues.

**4) Revisions to Bureau Plan**

Summarize any revisions to your bureau plan for managing museum property.

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**5) Goals**

Identify the goals of your bureau plan for managing museum property.

**6) History**

Provide a brief history of the bureau's museum collection.

**7) Oversight**

Describe the structure of museum [property oversight within your bureau. Identify individuals currently representing your bureau on the Department's museum property committees.

**8) Collection Size**

Summarize the size of your bureau's collection by discipline and location.

3. Optional Plans and Reports

The following plans are optional. Detailed guidance, such as provided by these optional plans, for correcting site-specific deficiencies is especially useful at sites that hold large museum property collections.

a. Security and Fire Protection Survey

A security and fire protection survey of spaces housing museum property may be conducted as part of a total or partial security survey, or as an independent study of only the facilities and/or spaces housing museum property. It examines operating procedures and physical measures for museum property collections security and makes recommendations for correcting any deficiencies noted. Refer to Chapter 11 for guidance on security and fire protection surveys.

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b. Collection Storage Plan

A detailed, site-specific plan for storage areas may be useful in developing new, or renovating existing, storage areas. Refer to Chapter 9 and Appendix G for information regarding the storage of museum property.

c. The Checklist Report for Preservation, Protection, and Documentation of Museum Property

The Checklist for Preservation, Protection, and Documentation of Museum Property is a comprehensive self-assessment by which units with museum property can identify deficiencies based on comparison of current conditions with standards established in the Departmental Manual (411 DM 2.1). This Checklist may be used as a tool to provide baseline data against which improvements in the management of museum property, including correction of deficiencies, may be measured and documented. Part I focuses on preservation and protection concerns (e.g., storage, environment, security, and fire protection), and Part II addresses documentation issues (e.g., accessioning, cataloging, and inventorying). A copy of the checklist is in Appendix E.

4. Annual Inventory Certifications

Physical inventory is required by 410 DM 114-60.100 (bb). Certification in writing must be submitted to the bureau that physical inventories have been completed and reconciled. In addition, 411 DM requires, as applicable, certification that the following inventories have been conducted:

- # 100% inventory of all controlled museum property, unless a bureau-designated authority has approve an exception and an alternate plan for units holding large amounts of controlled museum property.

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- # A random sample inventory of all other cataloged museum property, unless the collection has fewer than 250 cataloged objects and/or specimens, in which case a 100% inventory is required; and,
- # 100% inventory, by accession number (that is, by number of containers rather than by individual objects), of all accessioned but as yet uncataloged museum property, unless the collection has 250 or more uncataloged accessions, in which case a random sample may be used.

Refer to the Museum Property Handbook, Volume II, Chapter 4 for detailed guidance on conducting the annual inventory.

5. Mandatory Procedures

The Departmental Manual identifies the following mandatory procedures:

a. Preservation and Protection Procedures

The Department requires that each unit provide the following written unit-specific procedures for spaces housing museum property:

- 1) Key and combination control
- 2) Opening and closing
- 3) Access

Procedures 1-3 are crucial elements of a museum property security program. Refer to the Museum Property Handbook, Volume I, Chapter 11 and Appendix I for detailed guidance on these procedures.

b. Documentation Procedures

The Department requires that each unit's museum property management documentation system include the following procedures:

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- 1) Accessioning
- 2) Cataloging
- 3) Incoming and outgoing loan recordation
- 4) Deaccessioning, as appropriate

Procedures 1-4 are critical to providing documentation of museum property. Items one, three, and four are legal transactions. Refer to the Museum Property Handbook, Volume II, Chapters 2, 3, 5, and 6 for detailed guidance on these procedures.

c. Integrated Pest Management Procedures

The Integrated Pest Management Program (IPM) is a government wide program designed to reduce the use of pesticides. The two-fold goal of the IPM program in museum property management is to protect museum property from pests, and to reduce the use of pesticides in museum property collections. Refer to Chapter 6 for guidance on establishing an IPM program in spaces housing museum property, or for modifying existing IPM to ensure that museum property concerns are addressed.

6. Optional Procedures

a. Housekeeping Plan

A housekeeping plan specifies, in writing, appropriate procedures, materials, and equipment for the preventive conservation of museum property. This plan is especially useful when collections of museum property are in exhibits, displayed in historic houses, stored in large complexes, or stored in more than one location.

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C. CHECKLIST OF DOCUMENTS RELATED TO MUSEUM PROPERTY MANAGEMENT

This section provides a checklist of plans and procedures related to museum property management. Mandatory Departmental documents are indicated by an asterisk (\*).

1. Plans

<b>G*</b>	Bureau Museum Property Management Summary	Volume I	Chapter 2
<b>G*</b>	Scope of Collection Statement	Volume I	Chapter 3
<b>G*</b>	Collection Management Plan	Volume I	Chapter 2
<b>G*</b>	Emergency Management Plan for Museum Property	Volume I	Chapter 12
<b>G*</b>	Conservation Survey (as needed)	Volume I	Chapter 10
<b>G</b>	Security and Fire Protection Survey	Volume I	Chapter 11
<b>G</b>	Collection Storage Plan	Volume I	Chapter 9

2. Reports

<b>G*</b>	Museum Property Management Survey	Volume I	Chapter 2
<b>G*</b>	Annual Inventory	Volume II	Chapter 4
<b>G</b>	Checklist Report for Documentation, Preservation and Protection of Museum Property	Volume I	Chapter 2

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3. Procedures

<b>G*</b>	Key and Combination Control Procedures for Spaces Housing Museum Property	Volume I	Chapter 11
<b>G*</b>	Opening and Closing Procedures for Spaces Housing Museum Property	Volume I	Chapter 11
<b>G*</b>	Access Procedures	Volume I	Chapter 9
<b>G*</b>	Accessioning	Volume II	Chapter 2
<b>G*</b>	Cataloging	Volume II	Chapter 3
<b>G*</b>	Incoming and Outgoing Loans	Volume II	Chapter 5
<b>G*</b>	Deaccessioning	Volume II	Chapter 6
<b>G*</b>	Integrated Pest Management Procedures	Volume I	Chapter 6
<b>G</b>	Housekeeping Plan	Volume I	Chapter 7