

DEPARTMENT OF THE INTERIOR
DEPARTMENTAL MANUAL

Museum Property Handbook
(411 DM, Volume I)

Chapter 3 Scope of Museum Property Collection

A. INTRODUCTION

The first step in managing museum property is to write a Scope of Collection Statement (SOCS). The Scope of Collection Statements from each unit are the basic planning documents that are required for all Department of the Interior bureaus. (See 411 DM 2.1 B(2)) This Chapter outlines the core Departmental requirements for a SOCS. Bureaus are encouraged to augment the document to provide additional guidance and/or requirements of the unit that are bureau-specific. Bureaus may also substitute bureau-specific examples of suggested wording for a SOCS.

1. What is a SOCS?

The SOCS defines the holdings, present and future, of those museum objects that contribute directly to the mission of the unit. Museum property maintained by the unit should directly relate to the mission or programs of the bureau. However, bureaus are responsible for certain types of museum property as required by legislative mandate (e.g., archeological collections systematically recovered from Federal lands) that may or may not directly relate to the bureau mission. These legislatively mandated collections must also be included in the SOCS.

The SOCS evolves from legislation and planning documents specific to each unit and from laws, regulations, and bureau policies governing Federal activities that generate collections (e.g., archeological research and scientific specimen collection). A properly written SOCS provides the following information:

- a. Defines the purpose of a unit's museum property collection and sets agreed-upon limits that specify the subject matter, geographical location, and time period to which the collection should relate.
- b. States what types of museum property may be acquired to fulfill the purposes of the unit's museum property collection.

2. Who determines what you will manage as museum property?

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Each bureau and unit should establish, as appropriate, a Museum Property Committee whose members represent relevant disciplines. The role of the committee is

- # to identify museum property held by the bureau or unit
- # to determine which of the bureau's or unit's missions and programs are relevant to museum property
- # to determine which types of museum property the bureau or unit should maintain, acquire, or deaccession to support those missions, programs, and mandates
- # to draft a SOCS for each unit.

The perspective brought to the deliberations of the committee by each member, combined with a well-written SOCS, should ensure that all museum property is clearly relevant to a unit. The Museum Property Committee can provide checks and balances in the accountability process and assist designated authorities in making informed decisions.

B. WRITING A SCOPE OF COLLECTION STATEMENT

1. Writing a Scope of Collection Statement

Ideally, the unit's Museum Property Committee writes the SOCS because it is most familiar with the unit's mission and resources. While the specific content to be included in the statement is outlined below, it may be organized according to the individual needs of each bureau and its units. A checklist for evaluating a Scope of Collection Statement is provided in Appendix D.

Each SOCS should include the following seven sections:

- # Title Page
- # Introduction
- # Description of Museum Property by Category
- # Summary of Unassociated Funerary Objects, Sacred Objects, and Objects of Cultural Patrimony in Compliance with the Native American Graves Protection and Repatriation Act (NAGPRA)

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- # Acquisitions
- # Uses and Restrictions
- # Management Actions

The Introduction and Descriptions of Museum Property by Category are the most important and detailed sections because they establish the purpose and scope of a unit's museum property and describe the types of objects that should be managed as museum property.

a. Title Page

Prepare a title page. Spell out the full name of the unit (e.g., Patuxent Wildlife Research Center). The Title Page may also serve as the review and approval page for each Scope of Collection Statement. Figure 3.1 illustrates a format for the Title Page.

b. Introduction Section

This section defines the purpose of the museum property collection. Justify the collection by discussing pertinent elements of the unit's mission. Cite legislation, Departmental authorities, bureau requirements, unit requirements, and approved resource management and interpretive program documents.

1) **Purpose of the Scope of Collection Statement**

State the purpose of the unit's SOCS. Suggested wording for this section is as follows:

This Scope of Collection Statement serves to define the scope of present and future museum property holdings of Wetlands National Wildlife Refuge that contribute directly to the understanding and interpretation of the unit's purpose, themes and resources; and that must be preserved by Federal mandate. It is designed to ensure that all museum property is clearly relevant to the unit.

2) **Departmental Authorities for Museum Property**

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Reference the legal authorities for acquisition, management, and disposition of museum property, beginning at the Departmental level. Refer to Appendix A of this Volume of the Handbook for more information on Authorities. Suggested wording for this statement is as follows:

The Department of the Interior authority to

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DEPARTMENT OF THE INTERIOR		
BUREAU NAME		
NAME OF UNIT		
SCOPE OF COLLECTION STATEMENT		
Prepared by:	_____	_____
	Title	Date
Recommended by:	_____	_____
	Unit Manager	Date
Approved by:	_____	_____
	Bureau Official	Date

Figure 3.1. Sample Title Page for SOCS

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acquire and preserve museum property appears in the following laws and regulations: Federal Property Management Regulations (41 CFR 101) (FPMR); Interior Property Management Regulations (410 Departmental Manual 114-60) (IPMR); Archaeological Resources Protection Act of 1979, (16 USC 470aa-mm) as amended; an Act for the Preservation of American Antiquities, June 8, 1906 (16 USC 431-433); "Protection of Archaeological Resources", 43 CFR Part 7; "Curation of Federally-Owned and Administered Archeological Collections", 36 CFR Part 79; National Historic Preservation Act of 1966, (16 USC 470-470t, sec. 110) as amended; "Disposition of Federal Records", 36 CFR Part 1228; Preservation, Arrangement, Duplication, Exhibition of Records (44 USC 2109); Reservoir Salvage Act of 1960 (16 USC 469-469c); Native American Graves Protection and Repatriation Act of 1990, (25 USC 3001-13); Disposal of Records (44 USC 3301 et seq.); Federal Records Act of 1950, as amended ("Records Management by Federal Agencies" [44 USC 3101 et seq.]); "Federal Records; General," 36 CFR Part 1220; Information Resource Management, 380 Departmental Manual.

3) **Summary of Bureau Mission**

Summarize the bureau's mission statement. Bureau program(s), policies, and restrictions that are relevant to managing museum property should be cited. Provide titles and dates. Include excerpts.

4) **Bureau Authorities for Museum Property**

If the bureau's enabling legislation, policies, or program management documents provide specific direction regarding the acquisition, management, and disposition of museum property, include such wording.

5) **Summary of Unit Mission**

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State the unit's mission. If applicable, cite the unit's enabling legislation and/or program mission statement. Provide the document's title and date. Cite any relevant subsequent legislation. Include excerpts. If applicable, note that the legislation for the unit requires the establishment and maintenance of a museum property collection. Finally, state any missions or programs specific to the unit that are relevant to managing museum property.

6) **Purpose of the Unit's Museum Property Collection**

State the purpose for the unit's museum property collection. Museum property, whether cultural or natural, is inherently valuable for the information that it provides about processes, events, and interactions among cultures, individuals, and the environment. Placing objects and specimens within a broader context, through research, analysis, and documentary records, provides for the greatest public benefit, enjoyment, and intellectual enrichment. Natural and cultural materials provide baseline data, serving as scientific and historical documentation of the bureau's resources, and of the purpose for which the unit was established. In addition, cultural objects and archival materials may document important events or people in our history, technological processes, or artistic endeavors. To determine the purpose of the unit's museum property collection look at the following:

a) Resource Management Planning Documents

Study the unit's resource management planning documents. Where relevant, relate how the museum property collection supports the unit's resource management program. List pertinent resource management goals and objectives. If they exist, cite the relevant resource management plans. Include title(s) and approval date(s).

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b) Interpretive Management Planning Documents

Study the unit's interpretive management planning documents, including exhibit and interpretive program plans, if applicable. Where relevant, relate how the unit's museum property supports the unit's interpretive program. List pertinent interpretive goals and objectives. List interpretive themes and periods. Include title(s) and approval date(s). The subject matter, time period(s), and geographic area to be covered by the unit's museum property collection are usually defined in resource and interpretive management documents. Where interpretive activities are not officially recognized as part of the unit's mission, it is especially important that the Scope of Collection Statement clearly articulate the themes that together establish the parameters of the museum property collection.

c) Office Art

Cite management documents related to the use of museum property as office art. Include title(s) and approval date(s) if applicable. The goal and purpose for the unit's use of museum property as office art should be clearly stated.

d) Archeological Materials

Include archeological materials that the bureau is mandated to preserve. Archeological materials (e.g., artifacts, and scientific samples), project-generated documentation (e.g., field notes, maps, drawings, and photographs), and museum property documentation (e.g., catalog records, collection permits, collections inventories, and conservation condition reports and treatment records) that result from research on Federal lands or Indian lands, or through

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Federal funding or instrument, must be included in the SOCS. Curation of this type of museum property is mandated by law and regulation (e.g., Archaeological Resources Protection Act of 1979, as amended; and 36 CFR Part 79, "Curation of Federally-Owned and Administered Archeological Collections"). Suggested wording for this statement is as follows:

Certain types of museum property must be retained in the unit's museum property collection as required by legislative mandate (i.e., archeological collections generated by research authorized by the Archeological Resources Protection Act of 1979, and the National Historic Preservation Act of 1966, as amended).

e) Natural History Specimens

Include certain natural history specimens that are in the bureau's keeping. Refer to 411 DM 1.1 for guidance on what natural history specimens typically are not considered museum property and usually would not be included in a SOCS. Suggested wording for this statement is as follows:

Natural history specimens and samples, not consumed in analysis and determined to be appropriate for long-term preservation, and associated field data, records, and reports resulting from research conducted on Federal lands or with Federal funds, should be retained in the unit's museum property collection.

f) Laws, Regulations, and Conventions

List other laws, regulations, and conventions that are pertinent to the acquisition of museum property collections by the unit. Suggested wording is as follows:

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Other laws, regulations, and conventions pertinent to museum collections at (unit's name) include: the Endangered Species Act of 1973, as amended (16 USC 1531-1543); the Bald Eagle Protection Act of 1940 (16 USC 668-668d); the Migratory Bird Treaty Act of 1918 (16 USC 703-711); the American Indian Religious Freedom Act of 1978 (42 USC 1996); the Lacey Act of 1900 (18 USC 43-44); the Marine Mammal Protection Act of 1972 as amended (16 USC 1361-1407); the 1983 Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES); and the 1970 UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property (implemented in the United States by 19 USC 2601 et seq.).

c. Description of Museum Property by Category

The listing and description of categories of museum property is the essence of the SOCS. This section identifies in some detail the specific types of museum property that the unit retains to meet the purposes stated in the Introduction Section.

1) **Identification of Museum Property Categories**

Divide the museum property collection into appropriate categories that reflect its purposes. The Department identifies the following major categories of museum property:

- # Archeology
- # Art
- # Ethnography
- # History
- # Documents
- # Botany
- # Zoology
- # Paleontology
- # Geology
- # Environmental Samples

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Museum property may include, but is not limited to, these categories.

2) **Analysis of Current Museum Property Collection**

Briefly describe the current representation of object types under each museum property category identified by the unit in the Department of the Interior Museum Property Survey. Also discuss strengths and weaknesses of the existing museum property collection. Identifying weaknesses helps to define priority areas for active collecting. Gaps in the collection may provide insights into the unit's history, however, and should be documented for future reference. If acquisition is not anticipated, make a statement to that effect. Provide sufficient detail to allow discrimination among the various types of objects that may be available for inclusion in the museum property collection. If any of these categories is not applicable to the unit, make a statement that the unit does not collect or maintain materials in that category.

3) **Museum Property Categories - Definitions and Examples**

Refer to Appendix A for definitions of museum property. Following are definitions and examples to illustrate language and content appropriate for each collecting category.

a) Archeology

Archeological collections include objects (e.g., artifacts and scientific samples), project-generated documentation (e.g., field notes, maps, drawings and photographs), and laboratory and object documentation (e.g., collections inventories, computer documentation and data, and conservation treatment records) that result from systematic archeological research on Federal

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lands, tribal lands, or Federal funding. Curation of this type of museum property is mandated by law and regulation (i.e., Archaeological Resources Protection Act of 1979 and 36 CFR Part 79, "Curation of Federally-Owned and Administered Archeological Collections").

An example of text that might appear in this section is as follows:

Artifacts and Other Specimens: Archeological collections are generated by research authorized by the Archaeological Resources Protection Act of 1979, and the National Historic Preservation Act of 1966, as amended.

The archeological collection includes pottery shards and buffalo bones discovered during a dig of a buffalo jump on the Blackfeet reservation conducted by Dr. Thomas Kehoe in 1954.

Associated Records:

All records associated with archeological collections must be retained as museum property. These collections include field notes and catalogs; daily journals; drawings and maps; photographs and negatives; slides; sound recordings; raw data sheets; instrument charts; remote sensing materials; collection inventories; analytical study data; conservation treatment records; and computer documentation and data.

There are many gaps in this category. Emphasis needs to be placed on acquiring missing or incomplete records associated with many of the archeological projects conducted within the unit.

c) Art

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Artwork is defined as museum property that was made primarily for aesthetic purposes. Examples of artwork include:

- # Paintings (e.g., oil, watercolors, or acrylic on various support media, including canvas, artist board, and paper)
- # Prints and drawings (e.g., pen and ink drawings, pencil sketches, and chromolithographs)
- # Sculpture (e.g., metal, wood, ceramic, and glass)
- # Tapestries

An example of text that might appear in this section is as follows:

Paintings: The unit's collection of original oil paintings by Sidney King depicting life in seventeenth century Newtown are included in the museum property collection. The collection was originally purchased in the 1950s as office art, and continues in that capacity. Any additional paintings related to this series that become available should be acquired.

b) Ethnography

Ethnographic collections refers to those Native American objects made or used by or associated with, Native Americans peoples. "Native American" refers to a Indian tribe, people, or culture indigenous to the United States, and includes any tribe, band, nation, or other organized Indian group or community of Indians, and natives of the United States Territories.

An example of text that might appear in this section is as follows:

Artifacts produced by the Sierra Miwok and

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Mono Lake Paiute peoples, the historic residents of this region, as well as materials produced by neighboring groups such as the Washoe people are in the museum property collection.

The largest part of the collection (70%) is the basket collection. It includes both utilitarian baskets dating from 1820-1850 and made-for-sale baskets from the late 19th century.

Acquisition emphasis needs to be placed on items with collection provenience from the southern district of the unit. Baskets of the type collected by Abner Jones in the 1840s that are not represented in the collection may be acquired for comparative purposes.

e) History

Historical collections are objects and historical furnishings that are related to the history of the bureau, lands or functions managed or interpreted. Included in this category are gifts to bureau officials.

NOTE: 41 CFR 101.49.001-5 requires the reporting of foreign gifts valued over a certain amount (current figure is \$200.00). 5 CFR 2634.301(c)(5) states that employees are prohibited from accepting gifts over \$35.00. Such objects may include:

- # Furniture of historic or stylistic importance
- # Rugs (e.g., Oriental)
- # Natural history specimen mounts (e.g., mammals and birds)
- # Early equipment and tools
- # Scale models of agency-built structures and of patented items
- # Uniforms
- # Firearms

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- # Objects and/or specimens associated with eminent figures
- # Early boundary and regulatory signs
- # Books autographed by and/or belonging to important individuals
- # Interpretive media of historic interest (e.g., dioramas)

An example of text that might appear in this section is as follows:

The history collection is divided into two subcategories: (1) scientific equipment used in the unit since its inclusion in the bureau (1947 - present); and (2) objects related to nineteenth century exploration of lands managed by the unit.

- (1) *The unit retains one example of each type of scientific equipment used in its operations since 1947 (e.g., miner's lamp, bore-hole camera, and microscope).*
- (2) *The unit collects objects that relate to the numerous expeditions that explored the site between 1830 and 1890. The unit's interpretive themes for this period are outlined in the Introduction Section of this document.*

Personal items: *Objects in this category include toilet articles, cooking utensils, smoking materials, and writing and recreational materials used by, or appropriate to, individuals who participated in the Abner Jones expedition of 1845 - 1847. New acquisitions are limited to those identified in the approved Exhibit Plan for the lobby exhibit.*

Scientific equipment: *Stream gauging*

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instruments, survey equipment, and laboratory instruments of the interpretive period are the primary component of the collection. Acquisition in this area should attempt to fill the following gap: stream gauging instruments from 1885 - 1890. Only instruments with a documented affiliation to the site or to one of the area expeditions should be acquired.

d) Documents

Historical and/or scientific document collections provide evidence of events, persons or resources associated with the unit. Such materials are important to understanding and managing cultural and natural resources, and frequently are resources themselves.

Historical and/or scientific documentation may be acquired from non-governmental sources (e.g., records from Thomas Edison's laboratory managed by Thomas Edison National Historic Site), or may be generated in the course of Federal business (e.g., most resource management records and associated records). Because these document collections are made or acquired for the purposes of reference or exhibition, they are not official records as defined by the National Archives and Records Administration (44 USC 3301).

Examples of document types are:

- # Visual images (e.g., photographs and slides)
- # Manuscripts
- # Site forms, maps, and field notes

An example of text that might appear in this

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section is as follows:

Photographs and slides of the unit's history are acquired through solicitation of neighboring landowners, tourists, and other non-Federal sources. These items document activities at the site during its development, as well as the rate of deterioration and changing uses of land managed by the unit, and are collected solely for reference or exhibition purposes by the Museum Property Program.

The unit maintains resource management records that document actions taken to study or preserve cultural and natural resources. Examples of such documents include reports and field notes of all archeological activity and natural science field research regardless of whether artifacts or specimens were recovered.

f) Natural History Collections

Natural history collections include botany, zoology, paleontology, geology, and environmental samples. Each of these may be further subdivided into more specific subdisciplines. Examples may include:

- # Prepared biological specimens (i.e., plants and animals)
- # Prepared geological specimens
- # Paleontological specimens
- # Type specimens (standard bases for the original descriptions defining species and subspecies taxa)
- # Voucher specimens (document research activities and/or results)
- # Soil and core samples (unless managed by an alternate bureau system)
- # Environmental samples (e.g., residuals that require preservation for future use)

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An example of text that might appear in this section is as follows:

Collecting and maintaining a natural history collection is a vital part of the resource management and interpretive programs of the unit. Management of such museum property is tailored to the following specific purpose: preservation and protection of Cenozoic resources in the unit's east district.

Cenozoic Vertebrate Collection: Road work conducted in 1987 in the east district intruded into a Cenozoic formation containing rare and significant vertebrates. During the mitigation project, the University of Rockbridge collected a number of specimens, including saber-toothed cat skulls, that provided new evidence regarding the geographic range of the saber-toothed cat in the area. The university's repository maintains the collections on behalf of the unit through a cooperative agreement.

There is the potential for additional finds of scientific significance in the east district. Further collecting may be undertaken to establish the variation and distribution of Cenozoic vertebrates.

If a resource management or scientific need is demonstrated, additional collections may be generated.

Associated Records: All records associated with paleontological collections (e.g., field notes, instrument sheets, and maps) are retained as museum property. There are many gaps in this category. Emphasis should be placed on acquiring missing or incomplete scientific records.

- d. Summary of Unassociated Funerary Objects, Sacred Objects, and Objects of Cultural Patrimony in

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Compliance with NAGPRA

The Native American Graves Protection and Repatriation Act of 1990 (NAGPRA), 25 USC 3001-13, requires, in addition to other actions, a written summary of unassociated funerary objects, sacred objects, and objects of cultural patrimony. NAGPRA applies most frequently to ethnographic and archeological collections, but may also affect other categories identified above. Summaries and inventories required by NAGPRA should be based on information in the possession of the unit (e.g., catalog records). It has far-reaching implications for the management of museum property now and into the future. It is recommended that this section be included in the SOCS; however, if a bureau addressed this requirement in a separate document you may refer to that summary in this section of the SOCS. NAGPRA states the requirement as follows:

"Each Federal agency or museum which has possession or control over holdings or collections of Native American unassociated funerary objects, sacred objects, or objects of cultural patrimony shall provide a written summary of such objects based upon available information held by such agency or museum. The summary shall describe the scope of the collection, kinds of objects included, reference to geographical location, means and period of acquisition and cultural affiliation, where readily ascertainable."

Bureaus and/or units are required by NAGPRA to consult with Native American tribal governments, Native Hawaiian organization officials, and traditional religious leaders who have an interest in these materials throughout the process of identifying objects to be included in the summary. This summary can be used in consulting with appropriate tribal government and Native Hawaiian organization officials and traditional religious leaders who may use the summary to request access to additional museum records related to cultural items of interest.

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1) **Definitions of NAGPRA Categories**

Include in the summary the following definitions for objects provide by the law. (25 USC 3001-3013):

"Unassociated funerary objects" are defined as "objects that, as a part of the death rite or ceremony of a culture, are reasonably believed to have been placed with individual human remains either at the time of death or later, where the remains are not in the possession or control of the Federal agency or museum and the objects can be identified by a preponderance of the evidence as related to specific individuals or families or to known human remains or, by a preponderance of the evidence, having been removed from a specific burial site of an individual culturally affiliated with a particular Indian tribe...."

"Sacred objects" are defined to be "specific ceremonial objects which are needed by traditional Native American religious leaders for the practice of traditional Native American religions by their present day adherents...."

"Cultural patrimony" means "an object having ongoing historical, traditional, or cultural importance central to the Native American group or culture itself, rather than property owned by an individual Native American, and which, therefore, cannot be alienated, appropriated, or conveyed by any individual regardless of whether or not the individual is a member of the Indian tribe or Native Hawaiian organization and such object shall have been considered inalienable by such Native American group at the time the object was separated from such group."

2) **Summary of Unassociated Funerary Objects, Sacred**

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Objects, and Objects of Cultural Patrimony

In the SOCS, make a list of the following objects held by the unit.

- # NAGPRA category (unassociated funerary objects, sacred objects, and objects of cultural patrimony)
- # estimated number of objects
- # object type
- # geographic location
- # acquisition type
- # acquisition date
- # cultural affiliation

Be as precise as possible when preparing the summary. Distinguish groups of objects by specific cultural affiliation (e.g., a single tribe, such as Hopi). If the cultural affiliation is in question, items may be grouped under more than one defined group with a question mark denoting uncertain cultural affiliation, (e.g., Hopi? Zuni?). If cultural affiliation is unknown, that fact should be indicated, (i.e., "Affiliation Unknown"). Figure 3.2 provides a sample format for organizing the data for the summary. If the unit has no museum property in the NAGPRA defined categories of unassociated funerary objects, sacred objects, or objects of cultural patrimony, make a statement to that effect.

The summary requirement may be satisfied by an existing object-by-object inventory of unassociated funerary objects, sacred objects, and objects of cultural patrimony. If the unit has prepared an object-by-object inventory, include the inventory in the SOCS by reference in place of this summary. The inventory included in the SOCS should not contain sensitive information (e.g., monetary value or site location). This section will be revised as necessary to conform

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	BUREAU NAME UNIT NAME	SUMMARY OF UNASSOCIATED FUNERARY OBJECTS, SACRED OBJECTS AND OBJECTS OF CULTURAL PATRIMONY					
		NAGPRA categories are indicated in the left column under "Scope" as follows:					
		1 Unassociated funerary objects					
		2 Sacred objects					
		3 Objects of cultural patrimony					
		EXAMPLE					
Scope	Estimated Number of Objects	Object Type	Geographic Location	Acquisition Type	Acquisition Date	Cultural Affiliation	
2	11	pottery, prayer feathers	Within boundary of unit - Hopi Shrine	Donation	1936	Hopi	
1	5	pottery, stone, organic materials	Vicinity of Gallup, New Mexico	Donation, Unknown	1920-1925?	Zuni? Hopi? Acoma?	
3	1	mask	Within boundaries of unit	Field Collection	1960	Zuni	
1	123	pottery, stone, textiles, baskets, jewelry	Within boundary of unit - Twin House, 36 MG 159	Field Collection	1920- present	Navajo	

Figure 3.2. Summary of Unassociated Funerary Objects, Sacred Objects, and Objects of Cultural Patrimony for NAGPRA Compliance

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to NAGPRA regulations.

e. e. Acquisitions

Describe types of acquisition, including donation, purchase, exchange, transfer, and field collection. Note that a unit may acquire museum property through an active acquisitions program, or by designating as museum property items already managed by the unit. The unit must only acquisition museum property that it has the ability to manage according to Department of the Interior and bureau policies and standards. Briefly reference applicable bureauwide policies or standards for the acquisition and preservation of museum property. An example of text that might appear in this section is as follows:

Acquisitions

The unit acquires museum property by donation, purchase, exchange, transfer, or field collection. Acquisition of museum property is governed by the bureau's mission and the unit's ability to manage and preserve it according to the standards established in 411 Departmental Manual, and (list applicable bureau policies).

f. Uses and Restrictions

1) **Uses**

Describe the desired and acceptable uses of the units museum property and establish the limits of such uses. Possible uses include exhibits, interpretive programs, research, and other interpretive media (e.g., publications). State that the conservation of each object in question and the museum property collection as a whole is a primary consideration in all uses of museum objects and specimens.

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2) **Restrictions**

List any restrictions on the museum property collection. Some example of restrictions are:

- # limited public disclosure of site information for archeological resources and ethnographically sensitive information per applicable laws and regulations
- # limited access to certain objects for security purposes
- # copyright restrictions on publication of archival and manuscript material and works of art
- # restrictions necessary to ensure an object's preservation
- # restrictions on the disposition of type specimens
- # any limiting conditions placed on objects at the time they are acquired

Departmental policy (411 DM 3.4A(2)) states that restrictions on the future use of museum property will not be accepted. Exceptions must be approved in writing by the bureau's designated authority.

3) **Tribal Government Consultations**

Unit curators or other staff responsible for collections will consult with tribal government and Native Hawaiian organization officials and traditional religious leaders about the terms and conditions of collections from Federal lands that have significance for Native Americans and are collected under Federal permit. Such consultation is mandated by NAGPRA for certain types of collections.

4) **Final Dispositions**

The bureau should determine the final disposition of type specimens and should adhere to recognized conventions established for specific scientific disciplines.

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An example of wording for this section is as follows:

Uses and Restrictions

The conservation of each object in question and the museum collection as a whole is a primary consideration in all uses of museum objects and specimens. Museum property may be used for exhibits, interpretive programs, and research. Museum property should not be used in living history programs.

Restrictions may be placed on the publication of images or manuscripts in the museum property collection if these materials are subject to copyright, and this right has not been conveyed to the bureau.

Objects in the museum property collection may be made available to persons for use in religious rituals or spiritual activities in accordance with 36 CFR Part 79, "Curation of Federally-owned and Administered Archeological Collections" and other bureau policies.

Final disposition of type specimens is according to bureau policy.

g. Management Actions

1) **Storage and Oversight**

List storage locations of museum property housed outside of the unit. List bureau repositories as well as non-Federal repositories (e.g., universities and museums). State any management actions that are needed for oversight of these collections.

2) **SOCS Review**

State that the SOCS should be reviewed, at a

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minimum, every two years. Revise the document whenever changed conditions clearly alter a unit's mission or when priorities in a specific collecting category have been met. As part of the review process, the unit should ensure that the appropriate discipline specialists review and comment on the SOCS. An example of text for this section is as follows:

Management Actions

Repositories holding unit museum property include the following: Western Archeological and Conservation Center, National Park Service, Tucson, AZ; University of Pennsylvania, Museum Applied Science Center for Archeology, Philadelphia, PA. Following guidelines in Museum Property Handbook, Volume II, Chapter 4, Section A, any change in the condition of museum property included in the annual inventory must be explained.

This Scope of Collection Statement must be reviewed, at a minimum, every two years and, when necessary, revised to remain supportive of and consistent with any changes in the unit's mission. As part of the review process, the unit should ensure that the appropriate discipline specialists review and comment on the SOCS.

2. Museum Records

All documentation associated with museum property (e.g., accession and catalog records) are an inherent part of museum property. This documentation must be listed on the Federal Records Schedule as being retained by the bureau, and certified to the Archivist of the United States that they are needed for current business in accordance with 44 USC 3301 *et seq.* They are not cataloged or managed as museum property, but are retained in association with the museum property they support.

3. Preparation and Approval

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The Museum Property Committee assists the curatorial staff in writing the SOCS. Following review by the unit manager, a draft is forwarded through channels established by each bureau for review. Comments are returned to the unit for consideration. After review and upon recommendation by the unit manager, a designated bureau official at a higher level (e.g., region, area, or headquarters) approves the document.

C. IMPLEMENTING THE SCOPE OF COLLECTION STATEMENT

There are two ways a bureau may add materials to a museum property collection. First, the bureau may engage in an active collecting (acquisition) program. Second, the bureau may designate as museum property materials that it already manages. Frequently materials in the second category may have been misplaced or neglected for a long period of time; after rediscovery and identification, their value is recognized, and they are incorporated into the museum property collection. Potential museum property should be assessed in four areas:

- # Is the material identified in the approved SOCS?
- # Does the material fall into the museum property categories identified below?
- # Does the material meet one or more of the characteristics of museum property given below?
- # Does the material meet the selection criteria of site-specificity, physical condition, rarity, availability, authenticity, and collection management discussed below, as well as any additional criteria determined by the bureau and unit?

1. Identifying Museum Property

a. Definition of Museum Property

Refer to Appendix A for an extensive definition of museum property and guidance on discerning between museum property objects and objects that are identical in appearance, but that are not managed as museum property.

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b. Non-Museum Property - Working Collections

A bureau may decide that working scientific collections will not be managed as museum property. Working collections are organic or inorganic specimens or objects maintained by programs within bureaus for the purpose of education, identification, or ongoing research. They are not intended for permanent long term preservation. Each bureau needs to provide a bureauwide policy and procedures for the management of this material.

2. Selection Criteria

If the acquisition or designation of an object or specimen is justified by a Scope of Collection Statement, a bureau may reserve the right to accept or reject objects on the basis of the following criteria:

a. Are objects site-specific?

Objects original to a unit as determined by the Scope of Collection Statement are usually given first consideration for acquisition over non-site-specific objects. Objects related to themes or periods of a unit, but not original to the site, are considered next in priority. Decisions made concerning the acquisition of other than site-specific objects are based on their significance to the unit's interpretive and resource management programs and on such factors as authenticity. Reproductions are not considered site-specific objects.

b. Physical Condition

In some cases, damage that is the result of historic use or neglect may enhance the intrinsic value of an object. However, a unit should consider the acquisition of an object whose integrity has been significantly compromised by deterioration or abuse carefully. In general, the following questions are helpful when evaluating an object:

Is the object intact?

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- # Are all parts present?
- # Is there evidence of deliberate or accidental damage (e.g., paint spilled on an object)?
- # Does the object show signs of abuse or neglect (e.g., an axe used for prying or hammering)?
- # Is object made of materials that are inherently unstable (e.g., cellulose nitrate negatives)?
- # Could the object be stabilized if treated for relatively low cost?

c. Rarity

If an object is considered rare, it may be advisable for the unit to acquire it regardless of defacement, damage, or incompleteness or the quantity of a class of object already in the collection. This criterion is particularly important when considering site-specific objects.

d. Availability

Except for objects original to the bureau, curatorial staff should take advantage of the availability of proposed donations to replace like objects already in the museum property collection that are in poorer condition or of lower quality.

e. Authenticity

Can it be determined that the object is what the donor, seller, or field collector purports it to be?

f. Collections Management

Does the bureau have the resources (e.g., funding, staffing, facilities, and equipment) to properly manage the object?

3. Acquisition Guidelines

a. Legal Considerations

A bureau should knowingly acquire only those objects and specimens that staff has determined, to the best

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of its ability, to have been collected, exported, imported, transported, or otherwise obtained and possessed in full compliance with the laws and regulations of the country of origin, of the United States Federal Government, and of individual states within the U.S. These objects also must have been collected ethically, responsibly, and in a manner compatible with professional disciplines and museum standards.

A bureau should not support illicit trade by acquiring, authenticating, or commenting upon collections, or participate in transactions involving any collection by any museum or private person or institution that knowingly does so. Suspect materials should be reported to the unit manager and appropriate bureau officials. If a bureau should inadvertently acquire an object that is later determined to have been collected, exported, imported, transported, or otherwise obtained in violation of this policy, the bureau should make every practicable effort to return the object or objects to the rightful owner.

b. Acquisitions received by donations

A donor is entitled to claim a Federal tax deduction of the value of a gift to the bureau's museum property collection within current tax laws. The donor should obtain the valuation of the gift from an independent appraisal. The onus is on the donor to comply with current Internal Revenue Service's regulations. Refer to Chapter 2 in Volume II for more information on donor claims.

Any involvement in the valuation process by bureau staff may be a conflict of interest. Refer to Section D of this Chapter for guidance on appraisals and to Chapter 13 of this Volume.

c. Archeological and Natural History Acquisitions

As a general practice, the Department does not purchase archeological or natural history

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collections. Each bureau should develop a written procedure to be signed by the designated official regarding staff field collecting. A unit's staff field collecting procedures should include:

- 1) Brief background on field collecting activity in the bureau. Cite any pertinent legislation.
- 2) Discipline-specific procedures for both cultural and natural science collections.
- 3) Circumstances under which staff may collect archeological materials. Cite 43 CFR 7, and any applicable bureau policies.
- 4) Circumstances under which staff may collect natural history materials. Cite applicable bureau policies.
- 5) Staff responsibilities for these materials.

d. Collections Management

Acquiring a collection represents an investment in staff time, budget, and space to provide proper care and access. Acquiring and maintaining a collection entails the responsibility to preserve, organize, and make it available for use by researchers.

4. Copyright Considerations

The Copyright Law of 1976 (17 USC Part 102 *et seq.*), which became effective on January 1, 1978, provides copyright protection for "original works of authorship" fixed in tangible form including not only written documents, but also works of art such as sculpture, paintings, and photographs.

Procedures for obtaining copyright in a gift, purchase, or exchange transaction are outlined in the Museum Property Handbook, Volume II, Chapter 2.

D. DETERMINING THE VALUE OF MUSEUM OBJECTS

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Museum property is inherently valuable. Inherent value, often considered the highest value, is placed on museum property because of association with persons and events commemorated by a bureau, by information valuable to archeological and natural science research, or by heritage value for traditionally associated people and communities. Museum property is often irreplaceable, and discipline specialists are reluctant to assign an arbitrary value to what is essentially invaluable. This is true regardless of any free or black market trade that may exist within a discipline (e.g., fossil vertebrate, invertebrates, and plants).

Assigning monetary values to objects, however, is necessary under several circumstances: before outgoing loans or exchanges, in order to designate controlled museum property, and to justify management actions to protect and preserve museum property. With the exception of certain geological and paleontological specimens, natural history specimens are generally not appraised. Awareness of object and/or specimen values in a bureau's museum property collection is necessary to identify which objects should be designated as controlled property. Unit managers may need to know a unit's total collection value in order to justify increased funding, determine responsibility and grade of employees to work with museum property, or assess the level of preservation and protection requirements. The following discussion focuses on cultural museum property, that, for the specific purposes noted, must be assigned a monetary value.

1. Kinds of Values

An individual object can be assigned two kinds of monetary values: fair market value and replacement value. The purpose of assigning a value determines which kind is used.

- a. Fair Market Value is the price agreed to by a willing buyer and a willing seller. When possible, use the fair market value for determining the equity of exchanges. Donors are required to use fair market value to determine value for tax deduction purposes for the Internal Revenue Service.

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- b. Replacement Value is the amount of money needed to purchase a comparable item at full retail cost. This value is appropriate to most situations in a bureau: identifying value for catalog record, for insurance coverage for an outgoing loan, and for management purposes.

Assignment of either fair market value or replacement value may be inappropriate for certain ethnographic objects that are attributed with special meaning by a Native American group or other traditionally associated community. Assignment of a replacement value for these items should be limited to outgoing loans and established with full consultation of the particular group.

Note: The cost of conservation treatment for a site-specific irreplaceable object that has been damaged may exceed the fair market value or replacement value. Keep this point in mind when assigning values for outgoing loans.

2. What Makes an Object Valuable

Characteristics that affect object value include:

- # fashion
- # rarity
- # condition
- # age
- # collection provenience and documentation

English Lusterware pottery provides an excellent example of how fashion tempers object value. This late 18th and early 19th century earthenware was popular in its day and became very collectible again in the 1930s and 1940s. In the 1980s and 1990s, it has not been popular. Therefore, Lusterware's current value is actually less than it was in the 1940s. California Chumash Indian baskets provide an example of how limited supply causes an object's value to escalate. There is only one weaver alive today. There is an extremely limited supply of historic Chumash baskets. A cherry tavern table offers an example of historic association enhancing object value. This

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particular table had been used by General Meade as his desk during the Battle of Gettysburg and was signed on the underside by four Union soldiers. Therefore, its historic association makes it worth more money than such a table would be worth otherwise. The condition of an object often affects the value of an object. Missing pieces or visible repairs often decrease value. Sometimes collections which are complete are valuable, such as a collection of 1939 World's Fair bric-a-brac. The completeness of the collection is more valuable than the items within it.

3. Assigning Values to Museum Property

The purpose and need for knowing an object's value determines whether curatorial staff can assign the value or whether the services of a professional appraiser are necessary. Accurate identification of objects is the first step in being able to assign values.

a. Using Bureau and/or Unit Specialists to Assign Values to Objects

Curatorial staff can assign approximate values to objects within the collection by conducting research, checking auction catalogs and retail prices, and seeking the assistance of bureau and Department experts and outside museum professionals. Such values are acceptable for catalog records or for outgoing loans. Curatorial staff should become familiar with the replacement and market values for the types of objects in their collections by reading background reference material, examining price guides, and consulting with specialists. Attending antique shows, auctions, and educational forums are some of the ways for curatorial staff to gain this information. As a word of caution, curatorial staff should be aware of ethical conduct and conflict of interest issues; refer to Chapter 13 of this Volume. Price guides offer replacement value listings for all types of specialized objects like dolls, pewter, glass, furniture, and lighting fixtures. A list of price guides is included in Section E.

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A specialist may be needed when dealing with high value objects, unique objects, objects attributed to famous personalities, or objects of questionable authenticity. Bureau level staff responsible for oversight of the museum property program should maintain a list of experts within the bureau who can be called when a higher level of expertise is needed.

b. Hiring a Professional Appraiser

A professional appraiser is an individual with acknowledged expertise to establish a monetary value for an object. Professional appraisers should have no interest, monetary or otherwise, in the objects being appraised or in the institutions or individuals for whom they are appraising. Bureaus may obtain the services of an appraiser any time an appraisal is needed; however, bureaus should always obtain the services of a specialist in the following situations:

- # for objects of high value or questionable authenticity
- # for an exchange with a non-Federal private party or dealer (Refer to Departmental Museum Property Handbook, Volume II, Chapter 2 for guidance on exchanges)
- # for updating valuations for the entire collection

To determine the value of the entire collection the appraiser classifies types of items in each room, exhibit, or storage area such as kitchenware, furniture, linens, books, historical and scientific documentation, accessories, silverware, and lighting fixtures, and estimates a value for each category. By totaling these figures, the value of the entire contents of the collection is determined in a relatively short period of time.

Museum property collections can be specialized. Accordingly, bureaus should seek out a knowledgeable appraiser in the appropriate discipline area. For assistance in finding and selecting appraisers, units can contact their bureau-level museum property

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manager, local museum personnel, or a professional appraisal organization. The American Society of Appraisers (ASA) is an international, non-profit independent appraisal organization. The ASA requires written and oral entrance examinations and periodic recertification. The Society also maintains a directory of certified and accredited appraisers in various designated categories (e.g., fine arts, personal property, antiques, and real estate). Several pamphlets about the appraising profession including the "ASA Principles of Appraisal Practice and Code of Ethics" may be obtained by writing or calling:

The American Society of Appraisers
555 Herndon Parkway
Suite 125
Herndon, VA 20170
(703) 478-2228

Bureaus should ensure that only qualified and ethical appraisers are used. Do not hesitate to "interview" potential appraisers and ask about their training, education, specialties, references, and membership in professional associations. Any appraiser selected should have no past, present, or future interest in the transaction and may not be a previous owner or vendor of the object.

The bureau may also accept donated appraisal services. Apply the same standards to someone donating services, as to someone being paid.

Services of an appraiser usually include an on-site visit, some research, and preparation of a written report. It is recommended that an hourly rate be paid for services rather than paying a percentage of the total value. Charges based on a percentage of the value tend to encourage a higher value to be placed on the object. Appraisers working with high value objects are normally justified in charging a rate commensurate with the value of the object.

A professional appraiser's written report should

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include the following information:

- 1) statement of the kind of value being determined (e.g., fair market or replacement value);
- 2) name of the object and a description (if applicable, the description may include dimensions, materials, place of origin, style, condition, date, and value);
- 3) date of the appraisal;
- 4) statement that the appraiser certifies no interest, present, past or contemplated, in the subject property, and that appraisal fee is not contingent upon values certified;
- 5) signature of the appraiser; and,
- 6) personal qualifications data on the appraiser.

An example of a written appraisal is included in Figure 3.3.

4. Documenting Appraisal Information in Museum Records

Written appraisals, like those completed for exchanges or obtained by donors before the bureau received the object, should be kept in the appropriate accession or catalog folder. Refer to Museum Property Handbook, Volume II, Chapter 2.

5. When to Re-Appraise Objects

Continual fluctuations in the antique and fine arts market mean that values assigned to museum objects do not remain current. The most desirable goal is to periodically re-examine values assigned on catalog records so that they are up-to-date. This is particularly important in the event of theft, because the value listed on the catalog record may determine the type of police investigation conducted and whether criminal prosecution charges are pressed. Curatorial staff should be in tune to particular price fluctuations in "trendy"

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objects and change values on their catalog records accordingly.

6. Appraisals Conducted for Purpose of Tax Deduction

Departmental employees are prohibited from providing appraisals. Curatorial staff should not refer donors to specific appraisers in order to obtain a valuation for tax deduction purposes. Units may assist donors by informing them of the IRS law requiring the appraisal and referring them to additional information. Unit staff may find it useful to obtain a copy of the American Association of Museums publication Gifts of Property, A Guide for Donors and Museums (listed in Section E). This brochure provides guidance on the current IRS regulations (26 CFR, Part I) relevant to charitable contributions of property. The Tax Reform Act of 1984 (Public Law 98-369) set forth revisions to 26 CFR, Part 1. Bureaus should refer to this act for additional guidelines and requirements (e.g., definition of what constitutes a qualified appraisal and a qualified appraiser, and the requirement to acknowledge the receipt of donated property valued above \$5,000 per year by signing the appraisal summary, Form 8283).

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William Morris, Appraiser American Society of Appraisers 263 Market Street Philadelphia, PA 19097	
June 7, 1988	
Re:	Report for Virginia Carter Smith National Historic Site Ipswich, MA
The following is a list of museum objects which I inspected at your park on June 3, 1988. I have carefully examined each item, and, in my judgement their current replacement values are as follows.	
<u>Furniture</u>	
English Mahogany Secretary Bookcase, bracket feet, 3 long drawers below 3 short drawers, fitted interior with satin-wood fronts, two glass bookcase doors with V-shaped glass divisions, arched cornice, Circa 1790 - 44"w x 93"h	\$ 8,500.00
Mahogany Hepplewhite style Flip Top Dining Table, reproduction, 60" x 36"	645.00
Pair of French Walnut Regency style Round Tables, marble top, shelf below, 36" dia. Circa 1900	1,500.00
<u>Sterling Silver</u>	
Stuffing Spoon, feather edge, Old English Pattern - Beaver Crest Hallmarked - London 1810	325.00
Pair of Salt Spoons, Fiddle Pattern, Hallmarked London 1810	50.00/pr.
The foregoing appraisal is made with the understanding that the appraiser assumes no liability with respect to any action that may be taken on the basis of this appraisal.	
The appraiser hereby certifies that he has no interest, present, past or contemplated, in the subject property, and that his fee for this appraisal is not contingent upon the values certified.	
Yours very truly,	
William Morris Attachment: Appraiser Qualifications Vita	

Figure 3.3. Sample of Written Appraisal

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American Association of Museums and Association of Art Museum Directors

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Antique Trader Weekly
PO Box 1050
Dubuque, IA 52004

Bank Note Reporter...for Paper Money
700 E. State Street
Iola, WI 54990-0001

Scott
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Sidney, OH: Scott Publishing Company.

Warman's Antiques and Their Prices, Warman Publishing
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Kovel's Antiques and Collectibles Price List, Crown
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Knopf, New York. (**NOTE:** There are individual volumes
covering furniture, glass, dolls, quilts, pottery and
porcelain, silver, toys, and folk art.)

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