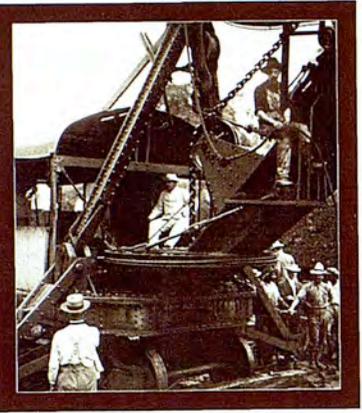


# TEN-YEAR REPORT 1998-2008



**PANAMA CANAL  
MUSEUM**  
Dedicated to preserving the history  
of the United States in Panama  
\* \* \* \* \*



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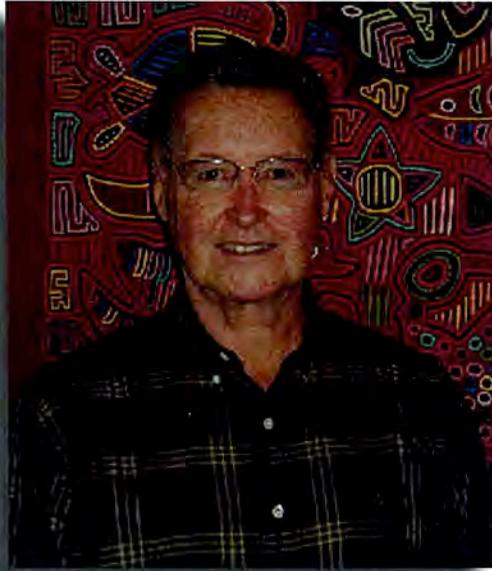
## MISSION

The mission of the Panama Canal Museum is to document, interpret and articulate the role played by the United States in the history of Panama, with emphasis on the construction, operation, maintenance and defense of the Panama Canal and the contributions to its success by peoples of all nationalities.

## VISION

To achieve national and international recognition as the foremost repository of historical information uniquely dedicated to documentation of the United States' participation in the history of Panama.

## Message from the President on the Tenth Anniversary of the Museum



In 2008 the Panama Canal Museum celebrated its tenth anniversary. While we struggled at times during those ten years, trying to find our identity and raise funds, we experienced overall steady growth in membership and donations and have continued to add significantly to our collection. This ten-year report captures the highlights of our operations over those years and tracks a number of benchmarks that we consider critical to our success.

In compiling this report, we came to the realization that a great deal has been accomplished in a relatively short time. We feel that we have provided a valuable service to so many people in a number of ways: with our many exhibits covering Canal Zone and Panama life; our special functions and events, such as "Lunch With Teddy Roosevelt"; and some distinctive products from our gift store, such as the award-winning cookbook, "Opening the Gates of Canal Cuisine," our series of collectible Christmas ornaments and calendars and the well-received and highly-complimented book, "Write of Passage – Stories of the American Era of the Panama Canal."

Not only do we provide a "Repository of Memories" for those who were uniquely blessed to have lived and worked in the Canal Zone and Panama, but we have taken important steps to preserve and teach the history of the United States' participation and involvement in Panama.

We may be victims of our own modest success: We continue to receive interesting and historically significant artifacts, to the point where we now are faced with the difficult problem of finding adequate space to house our collection. The result is that, while we have attained a fairly good stream of revenue to cover our expenses over the past ten years, we have not yet reached the point where we can readily afford to move to a larger facility. This is where our future efforts will be concentrated, with the view toward acquiring the funding to expand our operations.

We hope, in reading this report, that you take the time to reflect on what it means to have been associated with the great enterprise that is the Panama Canal and appreciate the importance of maintaining a museum like ours to preserve not only our heritage but also a valuable segment of United States history. Your continued support is the lifeblood of our existence.

Joe Wood  
President

## Historical Sketch – A Ten-Year Synopsis

Early in 1997, with the approaching United States' turnover of the Panama Canal to Panama, several former residents of the Canal Zone and Panama felt the need to take action to preserve the history of the American Era of the Panama Canal. Thus began the process of evaluating the feasibility of having a stand-alone museum: Many said it couldn't be done, but this small group of dedicated individuals forged ahead. For over a year many hours were put into developing an organizational structure, a constitution and by-laws and a marketing plan. By March 1998 it became clear that there was considerable interest in this project, and the museum was founded, thus beginning what has proved to be an interesting and exciting journey.

From humble beginnings in a small, leased office in Seminole, Florida, the museum soon outgrew its space. As the collection began to grow and finances improved, a decision was made to move into a much larger space in the same building on the first floor. It was a risky move because the rent consisted of more than half of projected income, with no assurance that those sources of income would continue. As it turned out, membership and donations continued to grow; gift store sales added an increasing source of revenue; and grants, fundraising cruises, luncheons, a silent auction, the Roosevelt Medal Certificate Program, the "Opening the Gates to Canal Cuisine" cookbook, the "Write of Passage" book, and other special projects provided additional funding.

During these past ten years, communications with members evolved through various means: a website developed by then Board of Trust-

Museum staff and volunteers get into the spirit of things by dressing in Panamanian attire for a visiting tour group.

ee member Bill McLaughlin (who later became President of the Panama Canal Society) and since restructured by Joey Zornes, current Webmaster; an annual solicitation for dues and donations sent to members and donors; two periodic publications – the *Panama Canal Museum Review* and *Panama Canal Museum Musings*; articles in the *Canal Record* – a quarterly publication of the Society, which graciously allows the museum several pages of museum news in each issue; and E-mail e-blasts sent to members electronically.

In 2006, the museum established a Speakers Bureau and created several PowerPoint presentations for use by museum representatives to teach the history of the US in Panama when speaking at schools, to civic groups, in churches, on cruise ships, etc. To complement the educational aspect of the museum's outreach, the *Panama*



*Canal Museum in a Trunk* program was introduced in 2007, and, through 2008, six trunks have been sponsored to be placed in various schools around the country.

Each year since 1999, a traveling exhibit has been on display at the Panama Canal Society's Annual Reunion depicting life in the Canal Zone and Panama. These museum exhibits have proven to be very popular and have helped to enhance the reunion experi-

ence for all who attend the reunions. On Page 7 is a list of the many exhibits that have been displayed by the museum at the reunions and in other venues.

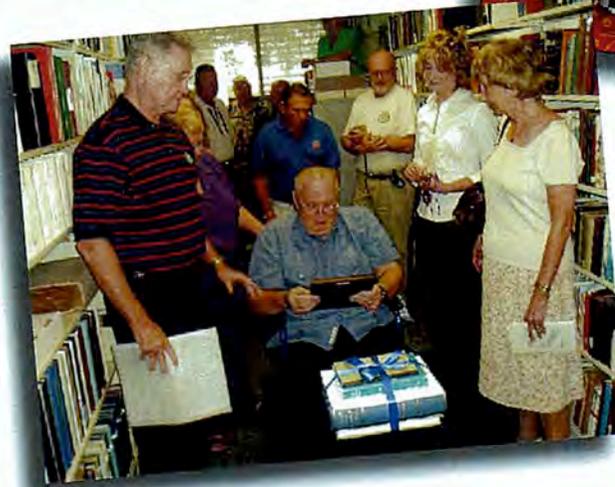
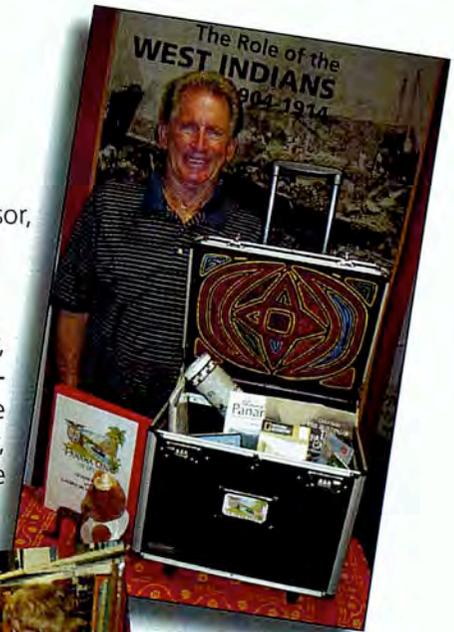
The Panama Canal Museum continues to serve the Canal Zone and Panama constituencies and the general public, providing a venue for historical and genealogical research and educational opportunities, while interpreting wonderful memories for thousands of people.

### Some of the highlights of the museum's first ten years of operation are listed below:

- 1998 – March 15 - Panama Canal Society Foundation, Inc., was formally established and registered as a Florida Non Profit Corporation.
- 1998 – July - First organizational meeting held in Orlando, Florida, during the annual Panama Canal Society Reunion. Founding Officers: President, Joe Wood; Vice President, Betty LeDoux- Morris; Executive Vice President, Chuck Hummer; Treasurer, Nancy Van Siclen; Secretary, Marie Wright Gibson.
- 1998 – First fundraising project – Silver Medallions, custom-engraved limited edition.
- 1999 – March 18 - Formally approved by the IRS as a 501 (c) (3) Non Profit organization. Museum purchases are tax-exempt, and contributions to the museum are tax-deductible – an important milestone triggering increased contributions.
- 1999 – Established first office in the Seminole Office Center – same building in which the Panama Canal Society offices were located. Because of limited space, board meetings were held in the Society conference room.
- 1999 – Website launched. Bill McLaughlin – Webmaster.
- 1999 – First traveling exhibit at Panama Canal Society Reunion.
- 2000 – Gift Shop opened for operations.

*Panama Canal Museum in a Trunk* sponsor, Frank Leves, Seminole, FL.

Joe Wood, President; Chuck Hummer, President Emeritus; Kristi Bjerneby Vanel-la; Pat Leach Bjerneby; and friends at the dedication of the Charles W. Hummer, Jr., Library for Historical Research and the Dick Bjerneby Collection.



- 2000 – First *Panama Canal Museum Review* published.
- 2001 – Moved to larger space in same building, with offices, display and exhibit areas, conference room, library, gift shop, work areas and kitchen. Acquired additional space in separate storage facility.
- 2002 – Name officially changed to Panama Canal Museum to reflect more accurately its function as a museum.
- 2002 – Established Roosevelt Medal Certificate Program.
- 2002 – First annual collectible Christmas ornament – Seal of the Canal Zone.
- 2002 – First Federal Grant – Institute of Museum and Library Services/American Association of Museums.
- 2003 – First Annual Silent Auction fundraiser at Panama Canal Reunion.
- 2004 – First Annual Museum Fundraising Cruise aboard *Celebrity's Horizon*.
- 2004 – First Educational Seminar – Potluck Luncheon.
- 2004 – Speakers Bureau established.
- 2004 – First employee hired – Elizabeth Neily.
- 2005 – Dedication of the Charles W. Hummer, Jr., Library for Historical Research.
- 2005 – Dedication of the Richard Bjerneby collection of library books and manuscripts.
- 2005 – First printing of museum fundraising cookbook, *Opening the Gates to Canal Cuisine*.
- 2007 – Elizabeth Neily promoted as first Director.
- 2007 – *Panama Canal Museum in a Trunk* project launched.
- 2007 – Astronaut Scott Parazynski takes Roosevelt Medal into space.
- 2008 – Services of consultant contracted to enhance fundraising capability.
- 2008 – Publication of *Write of Passage – Stories of the American Era of the Panama Canal*.



Popular museum store items



Panama Canal Museum Director, Elizabeth Neily, with Damaris Grajales de Reyes, Administradora of the Museo del Canal Interoceanico de Panama.



Theodore Roosevelt (a.k.a. Michael O. Smith) helped President, Joe Wood, blow out the candles on the museum's 10th birthday cake in 2008.

# Panama Canal Museum Activities

**YEAR EXHIBIT**

**VENUE**

Permanent Exhibits

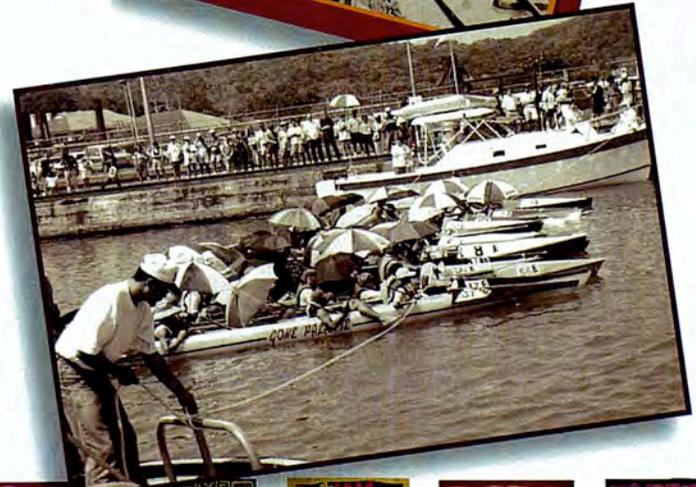
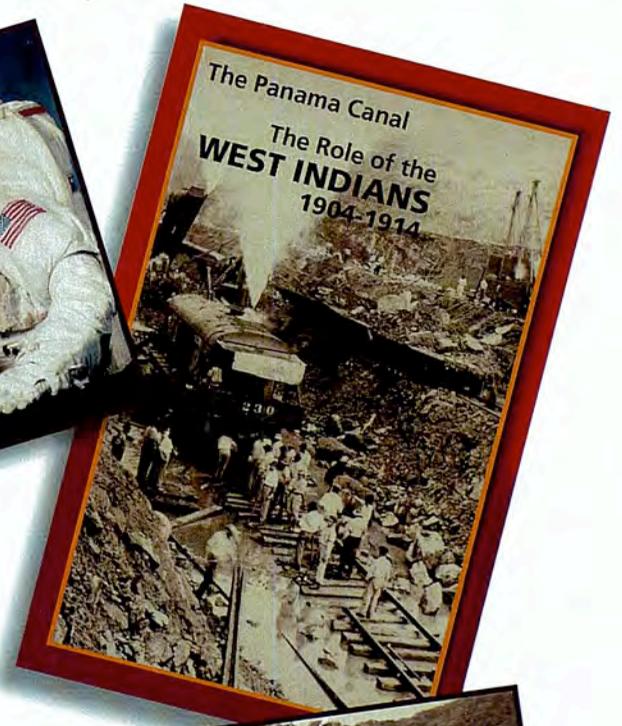
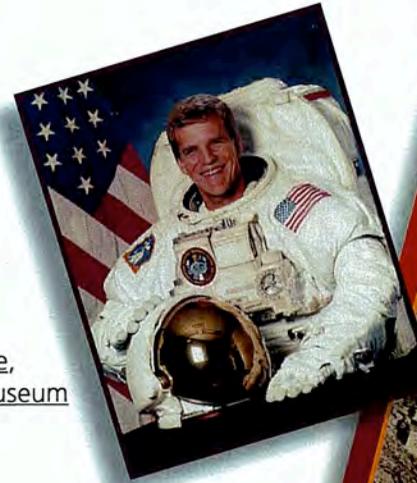
Panama Canal Museum

- 2001 The Spanish Era
- 2001 The French Era
- 2001 The American Era
- 2001 Tivoli Hotel
- 2005 Panama Railroad

Rotating and Traveling Exhibits

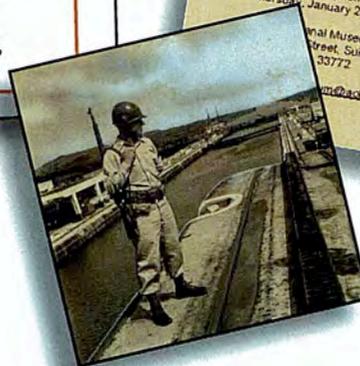
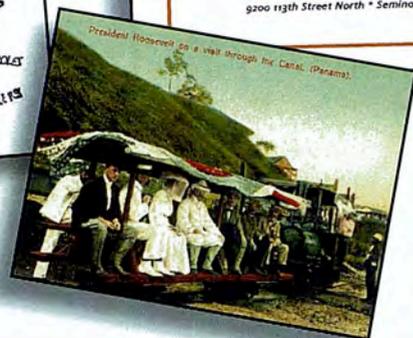
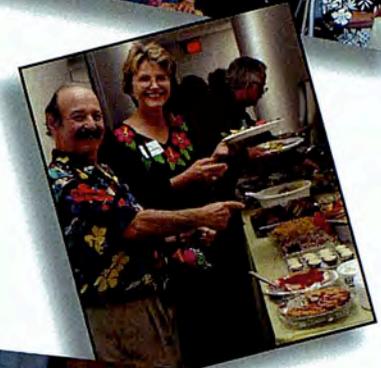
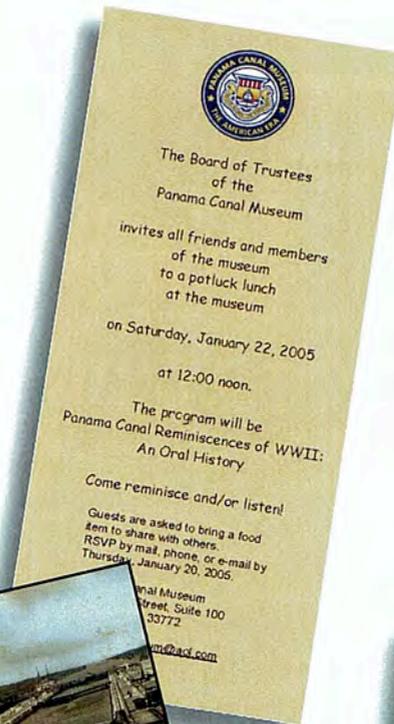
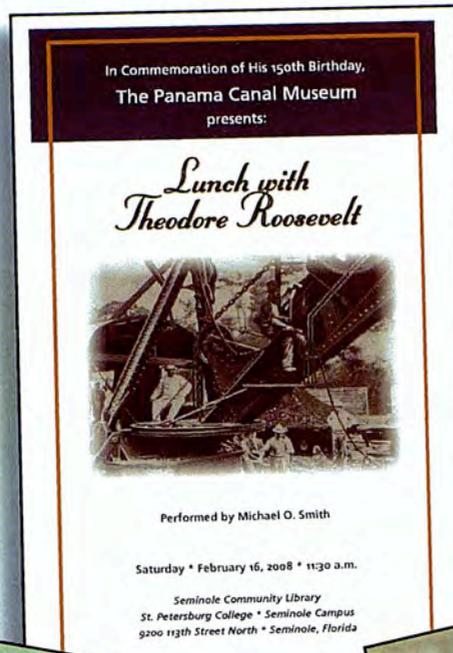
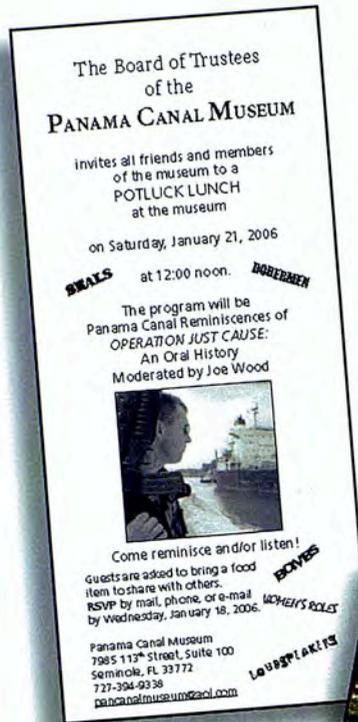
Panama Canal Society Reunions, Port of Manatee, Seminole Mall, Bay Pines VA Hospital and the Museum

- 1999 From the Panama Canal Museum Collection
- 2000 Schooling in the Canal Zone
- 2001 Canal Zone Postal Service
- 2002 Canal Zone Police
- 2003 Scouting along the Panama Canal and 50 Years of Ocean to Ocean Cayuco Races
- 2004 Panama Canal Construction Days
- 2005 Molas! The American Era
- 2006 The Role of the U.S. Military in the Panama Canal
- 2006 Panama Canal Museum Exhibit
- 2007 Panama Canal Society 75th Anniversary
- 2007 Canal Zone Housing with Township Maps
- 2008 Theodore Roosevelt Birthday
- 2008 The Panama Canal: The Role of the West Indians 1904-1914
- 2008 Living and Learning in the Canal Zone with Township Maps
- 2008 Lt. Col. David DuBose Gaillard and Astronaut Scott Parazynski
- 2008 Panama Canal and Military
- 2008 Indigenous People of Panama



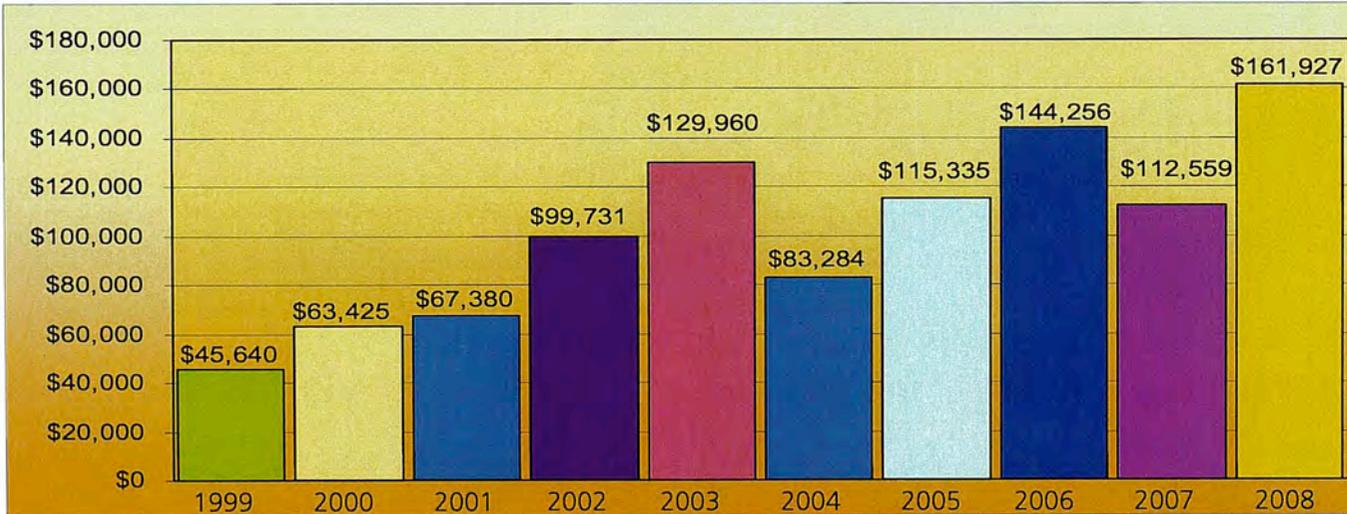
# Panama Canal Museum Annual Luncheons

- January 21, 2003 First Annual Potluck Lunch. Theme: Introduction to the Museum
- January 24, 2004 Second Annual Potluck Lunch. Theme: Panama Canal Lecture by Chuck Hummer
- January 22, 2005 Third Annual Potluck Lunch. Theme: Memories of World War II in the Canal Zone
- January 21, 2006 Fourth Annual Potluck Lunch. Theme: Operation Just Cause
- January 20, 2007 Fifth Annual Potluck Lunch. Theme: Global Passage: Transformation of the Panama Canal, with author, Robert R. McMillan
- February 16, 2008 Sixth Annual Lunch. Theme: Lunch with Theodore Roosevelt, Seminole Community Library



## Yearly Income

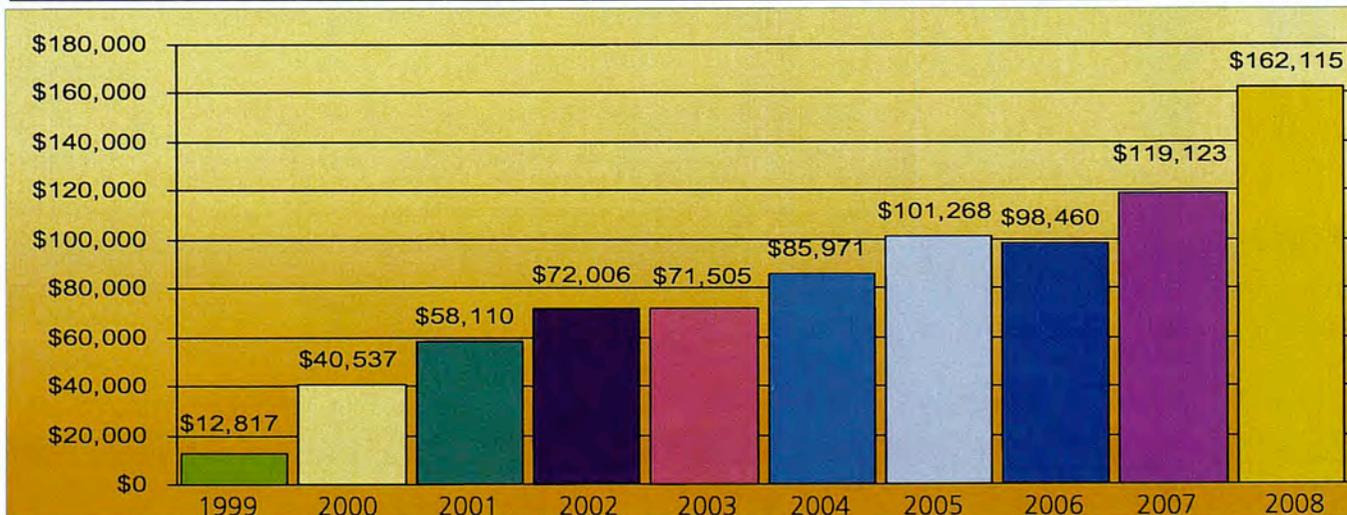
1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
\$45,640	\$63,425	\$67,380	\$99,731	\$129,960	\$83,284	\$115,912	\$144,256	\$112,559	\$161,927



Yearly income fluctuations result primarily from large donations and bequests, as well as the timing of extraordinary costs and revenues associated with major fund raising initiatives.

## Yearly Expenses

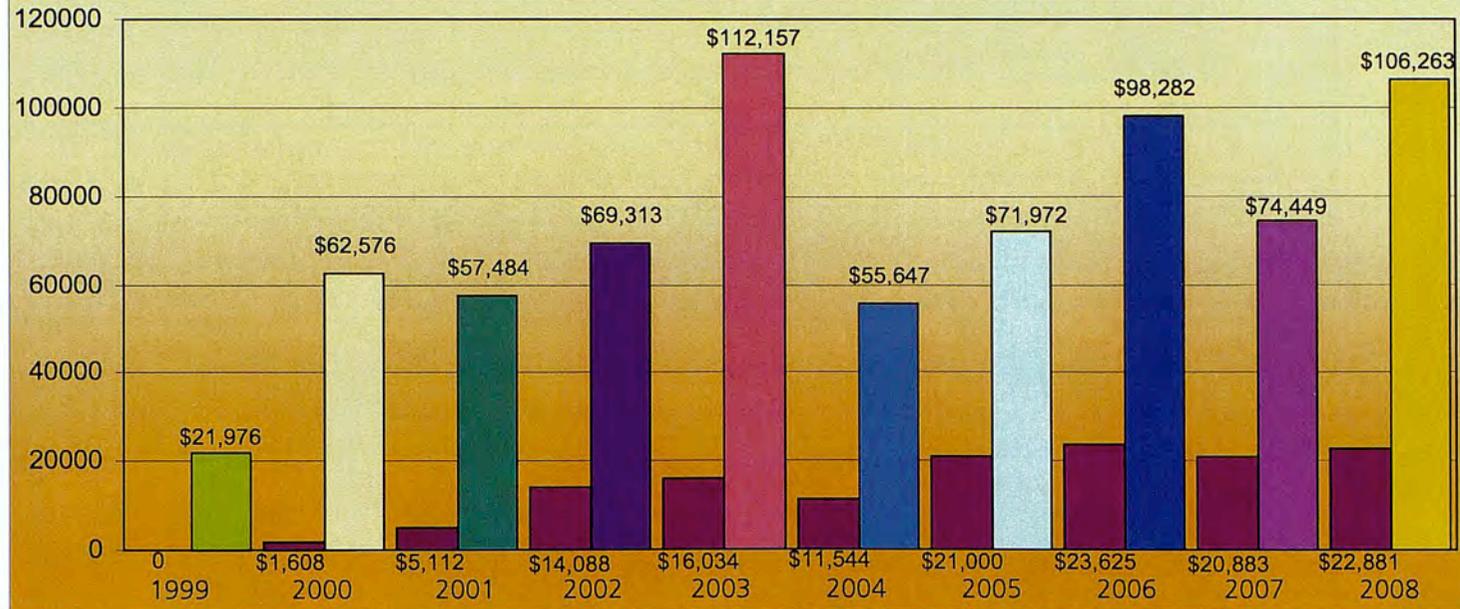
1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
\$12,817	\$40,537	\$58,110	\$72,006	\$71,505	\$85,971	\$101,268	\$98,460	\$119,123	\$162,115



The extraordinary increase in expenses for 2008 reflects grant related costs, certain non-recurring expenses, and a one-time contract expense incurred for the services of a national fundraising consultant.

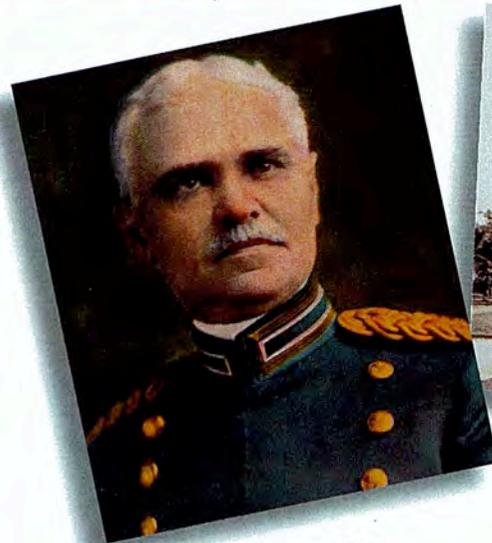
# Panama Canal Museum Annual Dues and Donations

1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
0	\$1,608	\$5,112	\$14,088	\$16,034	\$11,544	\$21,000	\$23,625	\$20,883	\$22,881
\$21,976	\$62,576	\$57,484	\$69,313	\$112,157	\$55,647	\$71,972	\$98,282	\$74,449	\$106,263



The museum began collecting dues in 2000. These figures reflect some extraordinary donations as follows:

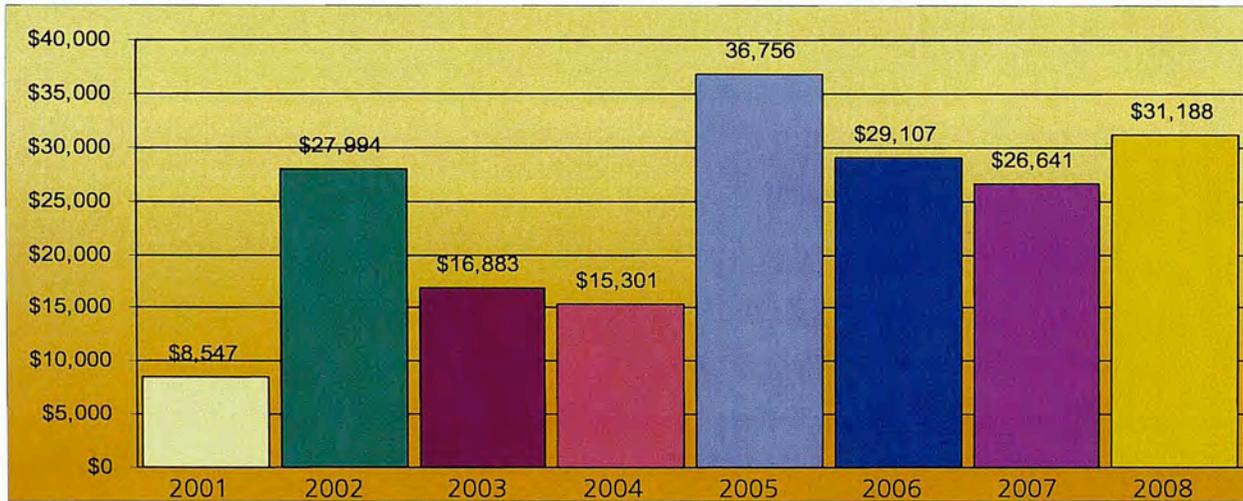
- 2003 - \$38,660
- 2004 - \$ 6,934
- 2005 - \$10,000
- 2006 - \$25,000
- 2008 - \$32,500



Chief Engineer Col. George W. Goethals (left) and Panama Canal Administration Building as it appeared in 1906 during President Theodore Roosevelt's visit.

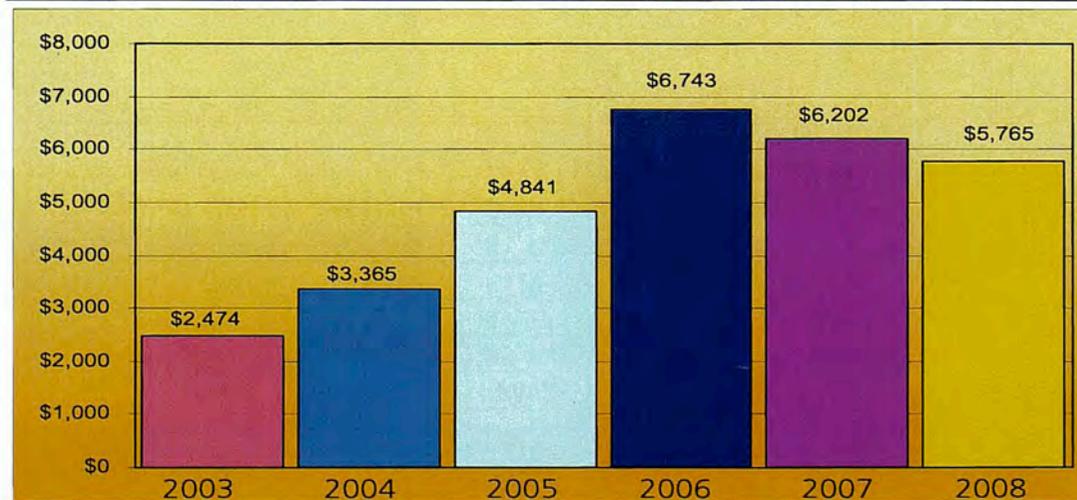
## Store Revenues

2001	2002	2003	2004	2005	2006	2007	2008
\$8,547	\$27,994	\$16,883	\$15,301	36,756	\$29,107	\$26,641	\$31,188



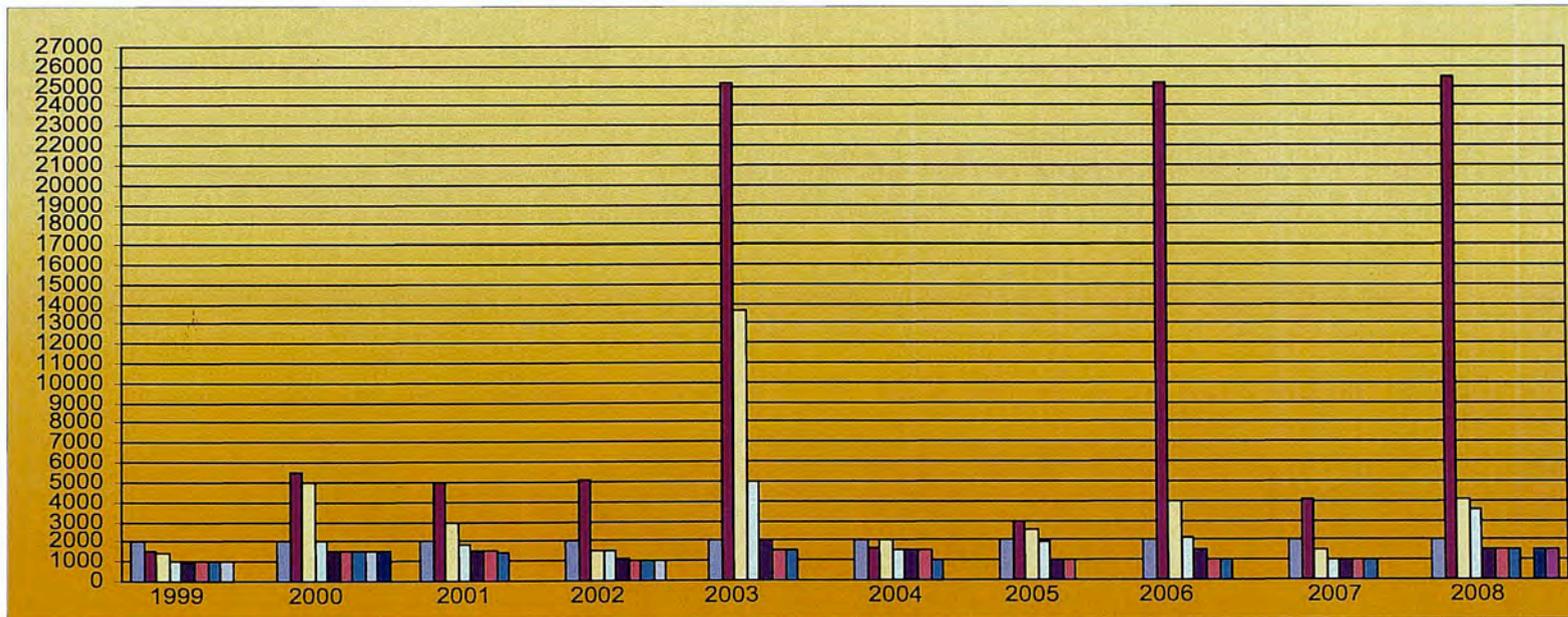
## Silent Auction Revenues

2003	2004	2005	2006	2007	2008
\$2,474	\$3,365	\$4,841	\$6,743	\$6,202	\$5,765



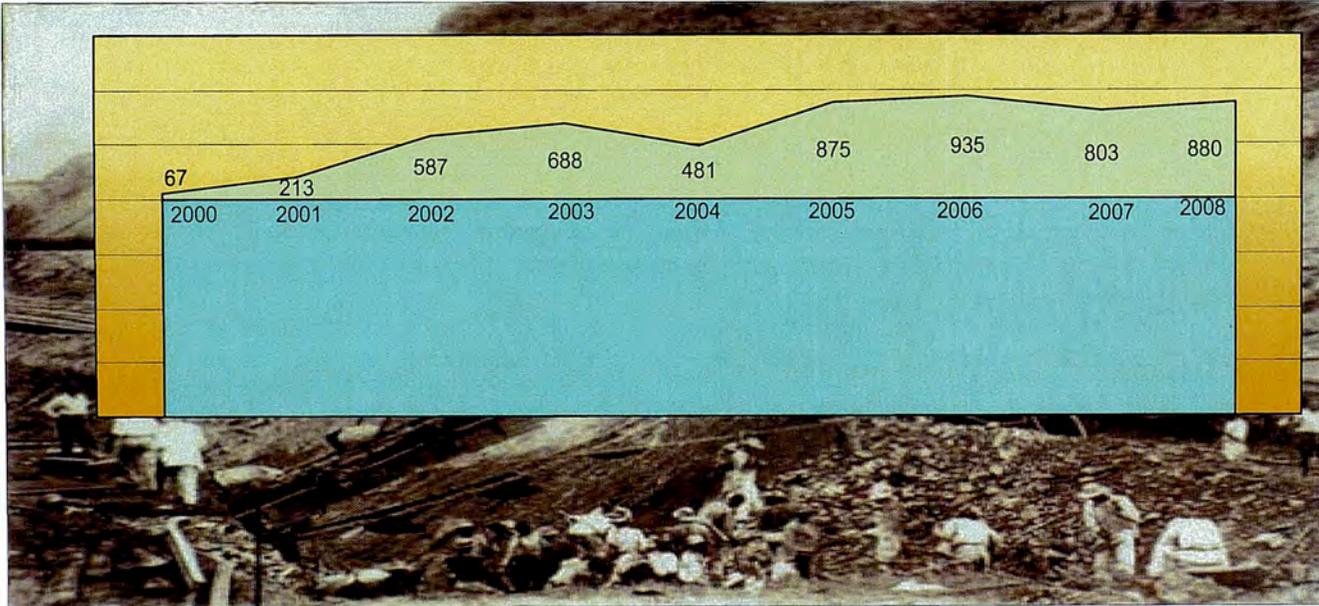
## Donations of \$1000 or More Per Year

1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
\$1,500	\$5,547	\$5,000	\$5,100	\$25,170	\$1,661	\$3,000	\$25,159	\$4,026	\$25,500
\$1,400	\$5,000	\$3,000	\$1,524	\$13,656	\$2,048	\$2,528	\$4,024	\$1,526	\$4,035
\$1,000	\$2,000	\$1,829	\$1,500	\$5,000	\$1,575	\$1,976	\$2,165	\$1,000	\$3,526
\$1,000	\$1,500	\$1,548	\$1,124	\$2,000	\$1,524	\$1,024	\$1,524	\$1,000	\$1,526
\$1,000	\$1,500	\$1,500	\$1,024	\$1,524	\$1,500	\$1,024	\$1,026	\$1,000	\$1,500
\$1,000	\$1,500	\$1,406	\$1,024	\$1,500	\$1,024		\$1,024	\$1,000	\$1,500
\$1,000	\$1,500		\$1,024						\$1,500
	\$1,500								\$1,500
									\$1,500



# Memberships

2000	2001	2002	2003	2004	2005	2006	2007	2008
67	213	587	688	481	875	935	803	880



Membership has grown steadily in the years since the membership program was established in 2000. During recent years the membership has fluctuated between 800 and 900 depending on the timing of members' dues payments.

Panama Canal Museum lobby. The museum opened to the public in this location in 2001.

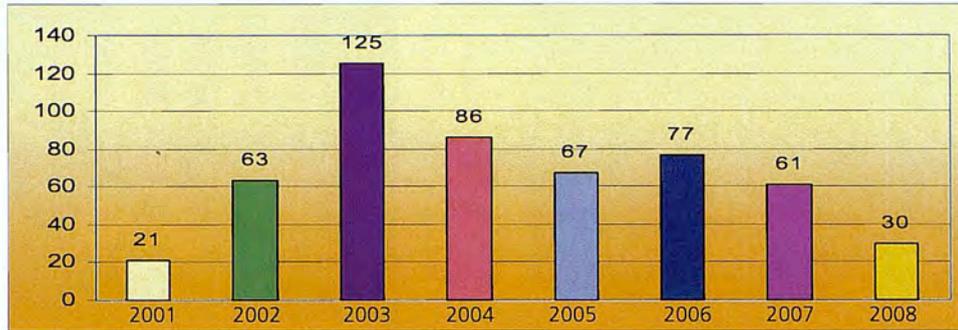


The Panama Railroad is one of many exhibits designed and displayed by the museum.



## Research: Number of People Served

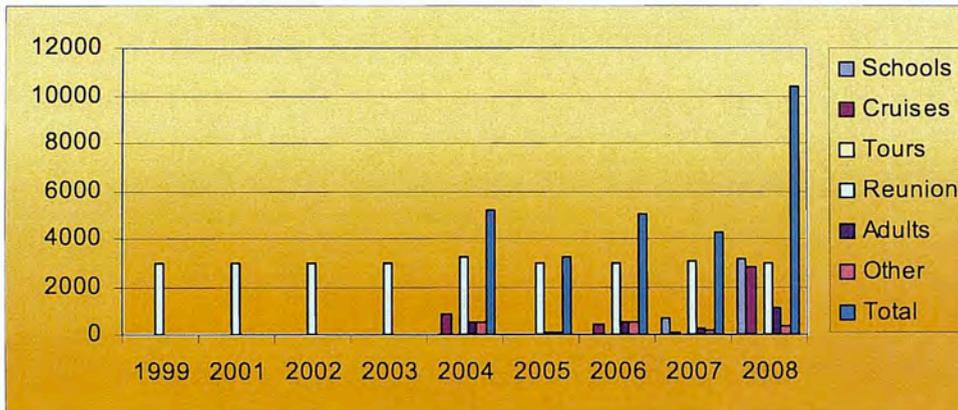
2001	2002	2003	2004	2005	2006	2007	2008
21	63	125	86	67	77	61	30



Research includes inquiries through the mail, over the internet and visits to the museum from students, media outlets, and descendants of Roosevelt Medal holders and other Canal employees.

## Programs and Educational Outreach: Number of People Served

	1999	2001	2002	2003	2004	2005	2006	2007	2008
<b>Schools</b>	NA	NA	NA	NA	21	24	0	685	3,117
<b>Cruises</b>	NA	NA	NA	NA	830	36	424	43	2,800
<b>Tours</b>									
<b>Reunion</b>	3000	3000	3000	3000	3,225	3,000	3,000	3,036	3,000
<b>Adults</b>	NA	NA	NA	NA	522	72	540	261	1,135
<b>Other</b>	NA	NA	NA	NA	534	79	508	200	319
<b>Total</b>	NA	NA	NA	NA	5,152	3,211	5,029	4,225	10,361

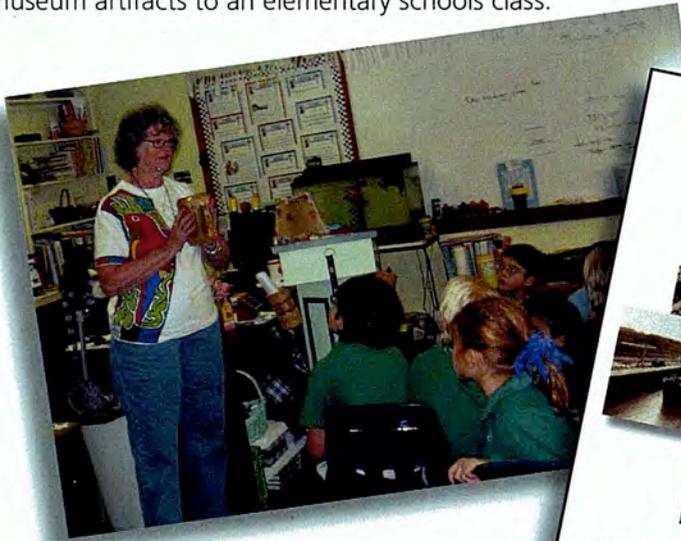


The museum started offering programs and exhibits at the Panama Canal Society Reunions in 1999 and Cruises and Tours and Educational Outreach programming in 2004.

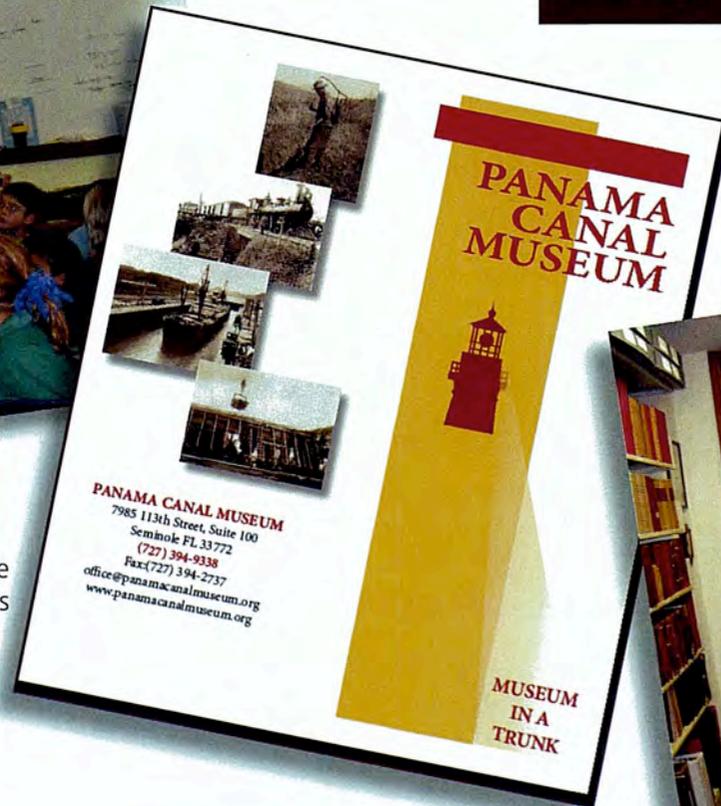
## Grants Received

July 2002	\$1,775	Institute of Museum and Library Services (IMLS) / American Association of Museums (AAM) Museum Assessment Grant
January 2004	\$1,000	Walmart
May 1, 2008 – January 31, 2009	\$8,914	Pinellas County Cultural Development Grant
May 1, 2008 – January 31, 2009	\$3,700	Pinellas County Cultural Accessibility Grant
October 1, 2008 – September 30, 2009	\$11,455	Pinellas County Cultural Development Grant

Educational outreach presenter, Marilyn White, shows museum artifacts to an elementary schools class.



*Panama Canal Museum in a Trunk* is one of the projects funded through the Pinellas County Cultural Development Grant.



## Items in Museum Collection

Library – 7,481  
 Objects – 3,215  
 Photos – 4,903  
 Archives – 1,887



## Board of Trustees

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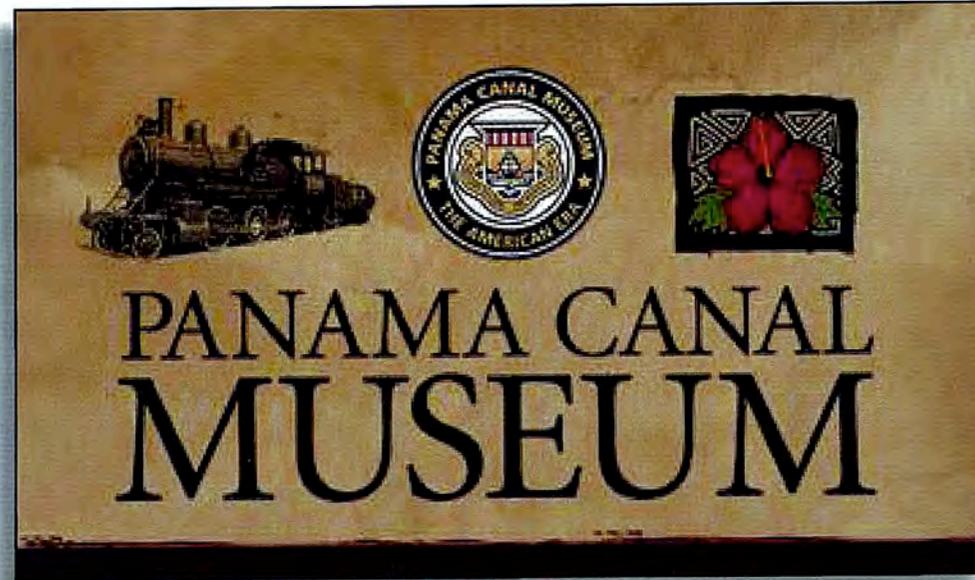
Walter P. Leber

D. P. McAuliffe

Robert R. McMillan

## Director

Elizabeth Neily



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Email: [office@panamacanalmuseum.org](mailto:office@panamacanalmuseum.org)

[www.panamacanalmuseum.org](http://www.panamacanalmuseum.org)

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## Agreement Between the Panama Canal Museum and the University of Florida

July 2012

This is an agreement between the Panama Canal Museum (PCM) and the University of Florida Foundation, Inc. (UFF), on behalf of the George A. Smathers Libraries (Smathers Libraries). The purpose of the agreement is to confirm the completion of the transfer of PCM collections and assets to the Smathers Libraries through the UFF and to ensure the future preservation of and access to the collections. The agreement also documents the responsibilities of the parties and expectations subsequent to the integration of the PCM collections and transfer of assets to the Smathers Libraries through the UFF (Integration).

This document serves as the final agreement marking the completion of the transition period. All collections and assets will be transferred by July 2012. A final Deed of Gift (for gifts-in-kind) and a Gift Agreement for tangible assets will be separate and complementary to this agreement between the parties.

## Disposition of Assets

It is the expressed agreement of the Parties (PCM, UFF and the Smathers Libraries) that:

1. The term “collections and assets” in each appearance in this agreement shall include, but not be limited to:
  - Original documents, publications, letters and other writings, reports, plans, maps, photographs, audio/visual materials, computer-generated materials, oral histories in any format, etc.;
  - Published materials (books, journals, government-issued publications, circulars, pamphlets, newspapers, bulletins, etc.);
  - Select artifacts that complement photographs and other items as described in a and b;
  - Additional physical artifacts identified by the Smathers Libraries for display in permanent or traveling exhibits;
  - Artwork, Pre Columbian and Indigenous artifacts (pottery, baskets, Molas, etc. with appropriate or requested documentation);
  - Exhibit and display materials (panels, lighting, display cases, shelving, bookcases, etc.) ; and
  - Office equipment (furniture, computers, televisions, digital video recorders and players, etc.).
2. Any remaining collections and assets not requested by the Smathers Libraries for permanent retention and/or digitization shall be disposed or otherwise distributed by the PCM in accordance with its policies and pursuant to its discretion. Items may be returned to their donors, disposed of through sale, auction, direct transfer or donation to allow other museums, universities, institutions or individuals to continue their preservation and enjoyment of those items to the extent possible.

## Mission of the Partnership

The mission of the Partnership (Mission) is to document, interpret, and articulate the role played by the United States in the history of Panama, with an emphasis on the Panama Canal and the people of all nationalities who contributed to its success. The Mission is of mutual interest to the PCM and the University of Florida and will continue to guide preservation of and access to the collections as well as support for related research and scholarship.

## Smathers Libraries

Subject to available funding, the Smathers Libraries agree to:

- Evaluate the PCM collections and to catalog, preserve and selectively digitize(Process) items that have transferred from the PCM to the Libraries;
- Prepare and promote finding aids, exhibits, lesson plans and other materials to promote access to and support the use of the collection;
- Identify and seek to obtain materials that enhance the collection and further the Mission;
- Create links to digital collections and make them available for public access;
- Provide adequate staffing to process the collections, maintain exhibits and provide research support; and
- Solicit funds payable to UFF to be used to process and sustain the collections, and to support the study and use of the collections.

In addition, the Smathers Libraries confirm a commitment to the following actions:

- Catalog and digitize publications of the U.S> Panama Canal Commission and its predecessor organizations and continue its commitment to serve as an Association of South East Research Libraries (ASERL) Center of Excellence for U.S. maps and documents related to Panama, the Panama Canal and the Panama Canal Zone;<sup>1</sup>
- Create and host a digital collection of materials related to the Mission from the PCM collection, its own collections and other sources;
- Assign a Librarian with expertise in Latin America as a subject specialist to provide reference and research assistance; and
- Foster collaborative relationships between the Libraries and internal/external entities

## Friends of the Panama Canal Museum at the University of Florida (Friends)

The Friends will be established and its members agree to work with the Smathers Libraries to accomplish the objectives as identified above and to:

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<sup>1</sup> The phrase, Center of Excellence is used here as it is used within the U.S. Federal Depository Library Program to identify a library establishing a collection and related services focused on a specific Federal agency or subject area represented by Federal documents. This is distinct from, and unrelated to, the Florida program of the same name that is intended to bridge the gap between academia and industry.

- Assist with fundraising and the recruitment of members with the goal of sustaining the Mission;
- Advise the Smathers Libraries on the allocation of the annual income from the endowment in support of the Mission, including processing of the collections, exhibits, oral histories and research scholarship;
- Deposit any future unspecified donations in support of the Mission with the UFF and advise the Smathers Libraries on the allocation of those funds;
- Participate in public relations activities (newsletters, reunions, web site and other communication, mailings, etc.);
- Donate and solicit relevant materials for the collection;
- Volunteer support for processing of materials;
- Assist the Smathers Libraries in interpreting, organizing and articulating the collection;
- Generate interest in and awareness of the United States' role in the history of Panama;
- Prepare and support exhibits;
- Participate in presentations and speakers bureau; and
- Support educational outreach and oral histories.

All parties agree to develop the appropriate documentation and/or guidelines to assist with this collaboration.

Agreed on by:

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Joseph J. Wood

Date

President, Panama Canal Museum Board of Trustees

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Patricia S. Kearns,

Vice President, Panama Canal Museum Board of Trustees

Date

---

Katherine E. Egolf

Date

Executive Vice President, Panama Canal Museum Board of Trustees

---

Judith C. Russell

Date

Dean, University Libraries

---

Rachel A. Schipper

Date

Associate Dean, Technology & Support Services, Smathers Libraries

---

Phillip J. Williams

Date

Director, Center for Latin American Studies

---

Paul Ortiz

Date

Director, Samuel Proctor Oral History Program

On behalf of the University of Florida Foundation, Inc. and the Smathers Libraries, University of Florida

(Signed copy available by request)



**Management Assessment of the Collaboration:**

**Panama Canal Museum**

**&**

**University of Florida  
George A. Smathers Libraries**

**Prepared by:**

**James A. Donovan  
President/DMI**

**December 2011**

## **Collaboration in Philanthropy Today**

Collaboration is the only way for any organization - business, government or nonprofit - to remain relevant in today's economically challenged world. The road blocks of old thinking must give way to streamlined engagement and innovation that is mutually beneficial, responsive, and economical to those we serve, now and for generations. Collaboration therefore is needed and, in fact, required by organizations. We no longer can afford good intentions; we must demand great results or face being relegated to irrelevancy.

*David Odahowski*

*President/CEO, The Edyth Bush Charitable Foundation, Winter Park, FL*

Historically, many charities have considered collaboration and mergers as "acts of desperation. Now we are seeing collaborations more as acts of strategy. We have a lot of very complex problems in the nonprofit sector and new comprehensive solutions to them, and you can't do it all within one organization.

*Alan Tuck, Partner*

*Bridgespan Group, Nonprofit Consulting, Boston, MA*

*As reported in the Chronicle of Philanthropy, March 24, 2011*

Having worked with hundreds of clients over the years, and being active in the *Association of Fundraising Professionals* (AFP) and the Council for Advancement and Support of Education (CASE), I have seen firsthand the trend of late of all kinds of nonprofit organizations engaging in collaboration --from the arts to zoos. It is not a step that can be taken capriciously. It requires study and planning by the principals of both entities to make the new vision and plan work. In addition, foundations are increasingly concerned about the sustainability of the non-profit community and volunteers are, like never before, sensitive regarding the perceived duplication of programs, services, facilities and staffing. Collaboration, although never easy, is expected to enhance efficiency, cost effectiveness and addressing future needs.

*William L. Carlton, ACFRE*

*Former Chair of AFP ACFRE Board*

*President/CEO*

*Carlton & Company, Boston, MA*

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# **Introduction and Methodology**

## **Introduction**

The University of Florida George A. Smathers Libraries (George A. Smathers Libraries) recently agreed to accept the holdings from the Panama Canal Museum (PCM) in Seminole, Florida, as the Museum was concerned about their ability to operate in the future due to funding challenges. In addition, the Panama Canal Society (PCS), a membership based organization, has been a valuable partner in promoting the legacy of the Panama Canal and involving “alumni” of the Canal who worked on it. The Society conducts special social events several times a year for its members at which the PCM and the George A. Smathers Libraries have participated.

The purpose of the Assessment was to review current management, exhibit and fundraising practices of the PCM and the George A. Smathers Libraries to determine how best to sustain and grow support from the constituents during and after the transition. In addition to interviewing PCM Board Members, the Assessment included interviews with key individuals from the PCS and the Panama Canal Advisory Group. As the Assessment proceeded, it was determined that others might wish to express their opinion on the consolidation, thus an Online Survey was made available to other Board Members of each group associated with this project. Thus, this report contains the collective input from all these constituencies.

Thanks to a dedicated group of volunteers and board members, the PCM has been operating for twelve years in Seminole, Florida. The year 2014 marks the 100<sup>th</sup> Anniversary of the construction of the Panama Canal. We have taken note of this historic milestone in our report and have made suggestions on how a collaborative effort among the PCM, PCS, the Advisory Group, and the George A. Smathers Libraries can attract philanthropic support to fund the processing of the collection, as well as creating a permanent endowment to maintain it.

## **Methodology**

This Assessment involved three major steps: first, a review of documents about the PCM and PCS, such as strategic plans; promotional materials; financial statements; budgets; websites; minutes of meetings; listing of board members; and the George A. Smathers Libraries PCM Quarterly Report of July 2011 which outlines costs incurred.

Second, personal interviews were conducted by Jim Donovan, President of DM, with the George A. Smathers Libraries, PCM and PCS in October of 2011. Each person was asked to describe why and how the consolidation came about, the need for future funding and how the various entities can work together in the future. Interviewees were promised that their comments would be held in strict confidence. Thus, the ensuing quotes are anonymously attributed. (See *Exhibit A: Persons Interviewed.*)

Third, we conducted an online survey with the board members of the PCM to determine what role they are willing to play in the future as the collaboration moves forward.

The information obtained from these three steps form the basis of the *Findings* section of this report.

After reviewing the findings, conclusions resulted.

Both the findings and conclusions were used to prepare the recommendations in the report regarding strategic decisions that will impact the future of the PCM Collection at the George A. Smathers Libraries. The key issue addressed here is how the new joint entity can position itself to attract the necessary philanthropic support, to not only cover ongoing costs associated with the collection, but also how to build up an endowment to preserve it for future generations.

## Findings

1. The PCM is a remarkable achievement by a small group of hard working and dedicated volunteers who have a passion for preserving and sharing the history and importance of the Panama Canal worldwide. Some volunteers devoted as much as 40 hours a week. Having worked with hundreds of non-profit groups over the years, the dedication of these volunteers is impressive. Harnessing that energy under the new arrangement with the George A. Smathers Libraries is the key to future success.
2. After struggling with a modest budget and no fundraising staff, the PCM Board recognized that many small museums in the United States were closing due to a number of financial issues. Knowing that its collection was truly one of a kind and recognizing the trend for digitizing materials and “virtual museums,” the board held discussions with the Smathers Libraries staff. The ensuing result was the decision to transfer the PCM artifacts, collection and exhibits to the George A. Smathers Libraries.
3. Another major factor for the transfer of the PCM Collection was the **Digital Library of the Caribbean**, for which the George A. Smathers Libraries is one of the founding partners and the technical infrastructure partner, which provides enhanced electronic access to cultural, historical, legal, and governmental research materials in a common web space with a multilingual interface. This would have been a major challenge and expense for the PCM.
4. When the PCM closes in Seminole, Florida, the Board will no longer have a physical Museum and is dependent on the Smathers Libraries staff and volunteers from both the PCM/PCS to help in identifying the collection, cataloging and tagging it. In addition, volunteers are needed as guest speakers/lecturers for future seminars and symposia. This is particularly important in anticipation of the Centennial of the Panama Canal in 2014.
5. Now that the PCM Collection is part of the George A. Smathers Libraries, it has the potential for rebranding as an international digital entity affiliated with a nationally recognized university. The collection itself is a national treasure. Now it has the expertise of the George A. Smathers Libraries’ staff, as well as fundraising staff at the George A. Smathers Libraries who are adept at seeking major gifts from individuals and foundations in the future. However, there is concern about increased workload of current staff and the need to hire additional staff to assist in fundraising. The final asset, which will take time to put in place, is the enlistment of hundreds of volunteers (as noted above) who can help in preserving and making the collection known to all constituent groups. This combination of the collection itself, the outstanding library staff and a wide range of volunteers can only strengthen the case for giving in the future.
6. The current strengths of the PCM include: its track record as a unique entity; programming on the History Channel; its dedicated volunteers; political contacts; over 800 friends of the PCM, including many alumni of the UF, and a recent successful fundraising effort of over \$100,000 for an endowment that will eventually be matched by the State of Florida.

7. An additional strength is the PCM collaboration with the PCS because the PCS has over 2,000 dues paying members, some of whom are also friends/donors to the PCM. The PCS members, who have the financial ability to continue their membership in PCS and at the same time make a tax-deductible contribution to the PCM, could go a long way in funding the needs as noted below.

Future funding needs of the PCM Collection within the George A. Smathers Libraries include covering the costs of:

- Cataloging and digitizing the collection
- A permanent space to store the collection
- Making the collection available online
- Marketing the collection
- Staffing to enlist and coordinate volunteer activities
- Unanticipated, unplanned expenses due to collaboration
- Establishing a permanent restricted endowment for upkeep of the collection

8. Other concerns expressed by interviewees during this assessment process were:

“What role does the former PCM Board play in the future?”

“What incentive can we give to the PCS to assist us in the future?”

“What’s the new governing structure and who should be on it?”

“Who will be the Advisors/Experts for the Collection?”

“What is the case for giving now that the PCM is affiliated with Smathers Libraries? Won’t people think that the UF is paying for everything and there is no need for gifts/grants to fund the collection?”

“How will donors be honored? Will there be a Donor Wall at Smathers Libraries that includes donors who made a tax-deductible gift, donors of artifacts and in-kind donors?”

## **Online Survey of 11 PCM Board Members**

**Note: The responses below are majority responses. Also, participants responded to more than one action item, thus there is overlap.**

When asked how board members would like to continue their use of the collections: 9 of the 11 board members indicated *remotely via online use of digital materials*;

As for continuing their support of the collections: 7 of 11 said *transition from PCM membership to Friends of PCM Collections at UF*.

Do you plan to attend Panama Canal Centennial Events in August of 2014, 7 indicated they would *visit the exhibits at the George A. Smathers Libraries and the rest would participate in the concert, lectures and the Mola exhibit*.

As for the timing to build up the endowment to maintain the collections, 3 said they would make a major gift, 8 would invite others to give and 7 said they would attend an information session.

All 11 freely offered their contact information which has been provided to the George A. Smathers Libraries since Donovan Management closed out the online survey.

The online survey findings represent an enthusiastic response from the PCM board in moving the collaboration forward.

## Conclusions

Based on the findings from the document review, interviews with the George A. Smathers Libraries, PCM, and PCS leaders, Donovan Management has concluded the following about the collaboration between the PCM and the George A. Smathers Libraries:

1. The current economic recession has caused many nonprofit organizations to fold or seek a collaborative partner due to decreased government funding and giving by individuals. According to the *Chronicle of Philanthropy*, collaboration between nonprofit institutions is not only increasing, but is being welcomed by grant making foundations that prefer organizations with similar missions to work together. This trend offers funding potential for the PCM and the George A. Smathers Libraries.
2. The leadership for the PCM is very positive about the future collaboration and willing to work closely with the George A. Smathers Libraries in addressing the questions as noted in Finding #8 above.
3. The case for giving to preserve the PCM Collection is stronger now that it is associated with a major research university. Clearly, the collection is a national treasure. This joint collaboration will appeal to national foundations that make grants for the preservation of history, education and digital/virtual collections. The case needs to be divided into three sections: regional, national, and international.
4. A special grant is needed to fund the cost of adding additional fundraising staff on a permanent or contract basis, as the present George A. Smathers Libraries staff working on this collaboration have a heavy workload.
5. Keeping the current PCM volunteers involved in the collaboration is a major concern for the future, as is the need to attract younger volunteers as well.
6. Future individual major donors, and in particular grant making foundations, are concerned about who is leading the collaboration in terms of volunteer leadership/governance and staff leadership. They need to have confidence that the grant will be used for the intended purpose and that progress reports will be provided to them on a timely basis.
7. This collaboration has the single most important key to successful fundraising – *A Sense of Urgency* to celebrate the Centennial of the Panama Canal. This should be used as soon and as often as possible with potential funders as the collaboration moves forward.
8. The Online Survey of the PCM Board findings represents an enthusiastic response from the PCM board in moving the collaboration forward.

# Recommendations

## Recommendations for Moving Forward

Based on the findings and conclusions, Donovan Management has drawn from the document review, the George A. Smathers Libraries interviews, online survey and interviews with the PCM and PCS leaders, we offer the following recommendations for moving forward in a manner that will provide for a financially secure future for the new collaboration between the PCM and the George A. Smathers Libraries.

### PCM and George A. Smathers Libraries

1. The Centennial of the Panama Canal offers a great opportunity for fundraising. We suggest an immediate fundraising planning retreat involving all the principals of the PCM, Panama Canal Advisory Group and others, to discuss this report and to determine financial goals over the three years. Given the upcoming Centennial, we suggest a phase one funding goal for it and a longer term phase two funding goal for all other financial needs, such as the endowment.
2. We suggest using an outside Facilitator to guide the discussion at the retreat, someone who can be objective and guide all parties toward a comfortable and common future working relationship. Clearly, the PCS is unique with its focus on socialization, holding events and maintaining life-long friendships. Given the requirement for membership – having worked on the Canal or some other official capacity, there doesn't seem to be a pool of new recruits/members out there to continue to grow the Society, unless it creates a new level of membership. That next generation of leadership can be most helpful in preserving the legacy of the PCM Collection at the George A. Smathers Libraries.
3. We suggest that the retreat agenda address the following concerns, from Finding #8.
  - “What role does the former PCM Board play in the future?”
  - “What incentive can we give to the PCS to assist us in the future?”
  - “What's the new governing structure and who should be on it?”
  - “Who will be the Advisors/Experts for the Collection?”
  - “What is the case for giving now that the PCM is affiliated with Smathers Libraries?”
  - “Won't people think that the UF is paying for everything and there is no need for gifts/grants to fund the collection?”

“How will donors be honored? Will there be a Donor Wall at Smathers Libraries that includes donors who made a tax-deductible gift, donors of artifacts and in-kind donors?”

### **Other Strategic Questions to be addressed at the Retreat**

What are the estimated costs of the collaboration over the next three years?

What is the feasibility of attracting philanthropic support from existing donors, corporations, foundations, members, patrons, sponsors, volunteers and education leaders to fund these costs? Should a fundraising feasibility study be done by an outside consulting firm?

How can the PCM and the George A. Smathers Libraries craft a compelling case for future giving that is attractive to a broad based of constituents – current supporters, history and education leaders, service clubs, government leaders, executives of grant making foundations and individual major donors who are passionate about the preservation of history?

The new name suggested for this collaborative is: *Friends of the PCM Collections at UF*. All endowed funds would be held by the UF Foundation.

In order to capitalize on the Centennial of the Panama Canal, the George A. Smathers Libraries will need to create a fundraising plan that outlines key action items, by whom and by when. It is presumed that initial funding will come from a number of groups, including the PCM, Panama Canal Advisory Group and others.

Who will oversee the enlistment, management and recognition of all volunteers in this new collaboration? What roles can volunteers play? Can funding be secured for a part-time Coordinator of Volunteers? Will a fundraising assistant under the supervision of the George A. Smathers Libraries’ Associate Dean of Development be required to support fundraising efforts by the new entity?

### **George A. Smathers Libraries**

4. Once the financial goals are set, develop a compelling case for giving. The case should answer the following questions:

#### **The Past**

What is the history of the PCM, its origin?

#### **The Present**

What is the status of the PCM Collection today with Smathers Libraries? Why is this collaboration so important and the right project, at the right time?

### **The Future**

What are the goals and aspirations for the future and how will these make a difference for the Panama Canal constituencies?

### **Resources Needed**

What human and financial resources are needed to meet future goals?

### **Governance and Leadership**

Who is providing the volunteer leadership?

In addition to using existing documents to answer these questions, we suggest those involved early on with the PCM be interviewed and asked the above case questions. The final case narrative can then be used in all marketing materials, online, in conjunction with proposal writing, as well as talking points when asking a prospect for a major or planned gift.

5. In the short term, social events should be held to generate giving and to increase the donor base. These events are most effective when hosted by couples who invite their friends and potential donors. The key is to allow enough time for socializing and a brief presentation on the new collaboration.
6. Continue to research and prepare a **Top Corporate/Foundation Prospect List** beginning with the American companies that worked on the Panama Canal and all other companies that provided services. Many have already been identified by staff as noted in memos we reviewed. Clearly the General Electric Foundation should be a prospect. However, to obtain any foundation grant will take more than a compelling grant application that meets a foundation's guidelines. It will require identifying and enlisting someone in or associated with the company's foundation to "shepherd" the application through the corporate maze, thereby increasing the chances of funding. Hopefully, UF engineering and business alumni who work or have worked for General Electric can be identified to help in this process.
7. Explore with the UF Foundation the possibility of enlisting a 12 member **Honorary Board of Governors** for the PCM and the George A. Smathers Libraries with representatives locally, regionally, nationally and internationally that would meet twice a year to lend their knowledge, expertise, counsel and connections in meeting organizational goals. Such a board also helps when applying for foundation grants on the national level.

### **PCM and George A. Smathers Libraries**

8. Consider asking a foundation or donor to pay the salary for the first year for a part-time Volunteer Coordinator to identify, enlist and manage a cadre of volunteers to perform numerous tasks, such as processing materials, identifying photos, serving on a Speakers

Bureau, educational outreach, and recruitment of members to become Friends of the PCM Collections at UF.

9. Once this report is taken under advisement and discussed among all parties, particularly at the suggested retreat above, a White Paper should be written that announces how the new collaboration will be a valuable asset to our nation, the Caribbean and the international community. It is also suggested that the parties contact Andy Corty, Publisher of *Florida Trend Magazine*, and ask him to consider a feature story for its issue on international commerce.

### **George A. Smathers Libraries**

10. Research and seek a Fortune 500 Company that is presently working on the expansion of the Panama Canal as a marketing partner through 2015 for a series of ads featuring The Panama Canal Faces of Philanthropy at the Smathers Libraries.
11. Depending on the status of J.P. Morgan Chase, as a current or future donor to the UF Foundation, we suggest working with the UF Foundation in arranging a meeting with former U.S. Senator Mel Martinez, Senior Vice President at J.P. Morgan Chase, keeping in mind J.P. Morgan played an important role in the financing of the Canal. In May of this year Mr. Martinez took on the added role as Chairman of the company's foundation which donates more than \$150 million a year worldwide.

### **PCM and George A. Smathers Libraries**

12. Appoint a small delegation to meet and brief U.S. Senators Bill Nelson and Marco Rubio on the transfer of the Panama Canal collection to the Smathers Libraries and plans for the Centennial Celebration so they will be in a position to prepare Senate Resolutions and other forms of public support for the upcoming Centennial. In addition, make them aware of the list of corporations on the prospect list in the event they have any dealings with them.
13. Since Florida Governor Scott has made trade with Central and South American a top priority and recently had his first foreign trade mission in Panama, share an executive summary of this report with him emphasizing the upcoming Centennial Celebration of the Canal.
14. Also, share an executive summary of this report with former Governor Jeb Bush and ask him for an exploratory meeting on how best to partner with the **Foundation for Florida's Future**, which he started. Use the quote below from the Foundation's website as a reason for requesting a meeting.

*"The world economy today is more interconnected and interdependent than ever before. Competition has gone global. As a result, Florida's students will compete with students*

*from China and India, as well as New York and California, for the high wage jobs of the future. In this new global marketplace, knowledge is the most coveted commodity. Emerging industries – and the high-wage jobs they provide – require greater expertise in math, science, technology and engineering. The success of today’s students will shape the future of our country and define its role in the world. To grow our economy and protect our quality of life, Florida must prepare its students to succeed in this dynamic and demanding environment.”*

## **Sustaining Philanthropic Support for the PCM Collection**

To sustain and engage the philanthropic constituencies of the PCM Collection, knowledge and skills will be needed in addition to current staffing. Given the present workload of the Library Staff engaged in fundraising, it may be necessary to create three new positions as noted below.

### **Special Events Assistant**

- Assist in planning and conducting the Panama Canal Centennial Celebration
- Research and identify sponsors for the Centennial
- Clear all prospects with UF Foundation
- Create sponsorship levels and benefits
- Solicit sponsorships
- Maintain a database of sponsors and event participants
- Draft event press releases for events for approval by the Dean
- Other duties as assigned

### **Membership Assistant for Friends of the PCM Collections at UF**

- Continue discussions with all parties on how best to integrate Friends into the new entity
- Update current database of Friends of PCM
- Devise a plan for increasing membership from various constituencies
- Set membership levels, \$50, \$100, \$250, \$500, etc.
- Enlist a Membership Committee
- Conduct membership drive
- Prepare membership newsletter
- Recognize members as the Faces of Philanthropy behind the PCM Collection

### **Volunteer Coordinator Part-Time**

- Identify key tasks for volunteers
- Identify skills needed from volunteers
- Identify, enlist and assign volunteers to key tasks
- Maintain a database of all volunteers
- Provide appropriate recognition for all volunteers
- Other duties as assigned

## **Major / Planned Giving Officer Job Description**

- Maintains the database of donors and prospects - **The Top Prospect List** and status of each solicitation
- Researches and identifies prospects at gift levels according to the gift table and assures that the "Pipeline of Prospects" is always full
- Meets with and cultivates prospects before a solicitation
- Uses Crescendo or another form of planned giving software to determine the best giving vehicles
- Prepares and assembles materials for solicitations
- Determines the best planned giving vehicle based on the donor's philanthropic objectives and tax savings – Charitable Remainder Trust, Lead Trust, Bequest, Donor Advised Fund, etc.
- Prepares reports for the Board of Directors
- Types proposals and assembles presentations to donors
- Maintains a calendar of solicitations, events, meetings and appointments with prospects
- Schedules meetings with individual prospects
- Assists in planning in-home prospect cultivation events
- Assists the Associate Dean for Advancement/Development as needed

## **Constituencies for Giving**

- Current donors
- Donors to other historical museums/collections in Florida and nationally
- History enthusiasts
- Members of PCM and PCS and friends on their mailing lists
- Corporations that worked on the Panama Canal or provided materials or services such as: GE, Dupont, Bucyrus, Ingersoll Rand, Texaco, Chicago Pneumatic, Fairbanks & Morse
- J.P. Morgan Chase, Sullivan & Cromwell
- UF Engineering Alumni working for Corporations that are now expanding the Canal
- Foundations that fund history projects, preservation and online education programs
- Cruise Lines – Royal Caribbean, Carnival
- Shipping Lines – Crowley Maritime, Seaboard Marine
- Florida East Coast Railroad

## **Action Plan/Timeline**

### **By Whom and Action Item**

### **By When**

#### **PCM, Panama Canal Advisory Group and George A. Smathers Libraries**

**1st Quarter 2012**

Share the Assessment Report with all interested parties, receive feedback

Conduct retreat as noted in Recommendation #1 and cover the agenda and key questions in Recommendation #3 and Finding #8 above

Finalize the governing structure for the collaboration between PCM and the George A. Smathers Libraries

Finalize arrangement and agreement for all future giving by donors to the Collection

Delegation to brief U.S. Senators and Nelson and Rubio

Enlist a Centennial Celebration Committee

Explore, with permission of UF Foundation, a partnership with the Foundation for Florida's Future, which was established by former Florida Governor Jeb Bush

#### **George A. Smathers Libraries**

Seek funding for additional George A. Smathers Libraries Advancement staff, if necessary — special events assistant, volunteer coordinator and major/planned gifts officer

Conduct case interviews, draft and test case

Finalize case, prepare case materials and distribute case

Seek advertising sponsors to promote centennial and case

Create donor database for Friends of PCM Collections at UF Membership campaign

Devise membership fundraising plan

Conduct membership campaign

Conduct in-home donor/prospect cultivation events quarterly

**PCM and George A. Smathers Libraries**

**2nd Quarter 2012**

Panama Canal Advisory Group meets to discuss Centennial plans

Share Centennial plans with Florida Trend Magazine

Begin enlistment of Board of Governors if approved by UF Foundation

Solicit Top Corporate and Foundation Prospects for support

Conduct in-home donor/prospect cultivation events quarterly

Conduct rating and evaluation of prospects, determine best solicitor

Convene leadership of PCM, PCS, Advisory Group and the George A. Smathers Libraries' staff to discuss status of goals, make adjustments

**PCM and George A. Smathers Libraries**

**3rd Quarter 2012**

Discuss plans for Centennial celebration/education plan

Devise a Centennial campaign plan that is local, regional, national and international in scope

Repeat major action items above as necessary such as:

Prospect review and assignments to solicitors

In-home donor/prospect cultivation events

Convene leadership

Convene Panama Canal Advisory Group

Run advertisements via sponsor

Enlist volunteers

Report all results/achievements

**PCM, Panama Canal Advisory Group and George A. Smathers Libraries 2013**

Implement Centennial education plan with monthly events, seminars, symposiums, etc.

Seek extensive awareness so as to lay the groundwork for giving to the Centennial campaign

Conduct the quiet phase of the Centennial campaign for lead major gifts

**PCM, Panama Canal Advisory Group and George A. Smathers Libraries 2014**

Celebrate Centennial

Launch public phase of the Centennial campaign

## **Exhibit A: Persons Interviewed**

A total of thirteen people were interviewed for this Assessment:

### **Panama Canal Museum Board**

Joe Wood, President  
Kathy Egolf, Executive Vice President  
Bob Zumbado, Trustee  
Richard Morgan, Trustee

### **Panama Canal Society**

Tom Wilder, President  
Mike Coffey, First Vice President

### **George A. Smathers Libraries**

Judith C. Russell, Dean of University Libraries  
Sam T. Huang, Associate Dean for Advancement  
Rachel A. Schipper, Associate Dean for Technology & Support Services, PCM Board Member  
  
Bess G. de Farber, Grants Manager  
John Freund, Conservator  
Paul Losch, Latin American Collection  
Laurie N. Taylor, Digital Humanities Librarian

# Best Practices

## Donovan Management Best Practices

### Role of Volunteer Leaders/Campaign Cabinet

In fundraising, staff is on tap and volunteer leaders are on top. Why? Because *people give money to people* (they know/trust and see that they are giving freely of their time to a cause), not to staff who are paid for his/her time. Peer level, *volunteer driven capital campaigns*, are always the most successful. Thus, there is no substitute for volunteer leadership that *leads by example* and is passionate about the mission of the organization.

Your role as a leadership volunteer or member of the campaign cabinet is:

1. To enlist others on the campaign cabinet or a committee level such as Special Gifts Committee.
2. To assist in identifying and rating potential donors to the campaign, particularly at the \$10,000 level and up.
3. To assist in educating and cultivating the prospects *before* they are asked to give to the campaign.
4. To make your own leadership gift consistent with your commitment to your campaign and your personal ability to give, in other words, not a token gift but a major gift.
5. To give careful thought to who is the best person to solicit prospects and to devise an asking strategy that is to the benefit of the donor first and your organization second. This includes tax savings for giving as well as special naming opportunities in recognition for their gift or in honor or memory of a loved one.
6. To prepare yourself for making solicitations by being fully informed or trained by a consultant in major gifts *before* you make the ask.
7. To attend campaign cabinet meetings and be actively involved in all discussions, ask questions, stay positive and keep the campaign on track.
8. To have the discipline to follow the campaign plan and timeline and to avoid taking short cuts. By taking short cuts you end up short of your goal.
9. To communicate with campaign staff and fundraising counsel as often as necessary when preparing for meetings, cultivation events or solicitations. You can't be over prepared.
10. To not promise a donor anything that must be approved by the full board of directors beforehand, such as the naming of a building and or a space or place in it or on grounds.

## **Board and Capital Campaign Steering Committee Solicitation Process**

**Premise:** Those who give birth to great causes do so by leading the way. When it comes to asking others to support the cause, a *prerequisite* is that those leading it ought to have provided the *first gifts* of the campaign, thus the term leadership giving. It sets the example for others to follow.

**Formula:** Anyone in a leadership position is expected to make his/her gift to be *one of the top three gifts to charity* for the year the campaign takes place. The gift should also be in *proportion* to one's financial ability to give. In other words not a token gift.

### **Objectives of Campaign Giving:**

1. 100% participation
2. 100% proportionate giving by all leaders involved
3. Collective board/committee giving equals a respectable percent of the overall campaign goal, usually 5% or more

### **Process:**

1. Chair or Co-Chairs of the board or Campaign Committee announces the giving objectives and rationale. Allow time for leaders to "think about" their gift.
2. Chair or Co-Chair make their gift/pledge in writing and report it to the CEO.
3. Chair and Co-Chair challenge key committee chairs to do likewise.
4. Key committee chairs challenge their committee members to do likewise.

**Timetable:** One month from start to finish.

### **Benefits of Meeting Giving Objectives:**

1. Provides fundraising momentum for the campaign and the first opportunity to report campaign progress in newsletters and email updates.
2. Satisfies requirements of grant making foundations about how much the leadership has given.
3. Strengthens the case for giving when leaders ask others to give as they have done so themselves.
4. Makes stakeholders out of all leaders involved, providing a vested interest in the success of the campaign.

5. It demonstrates to prospective donors, leadership's commitment and strong belief in the mission of the organization.

### **Confidentiality and Recognition**

- Gift amounts are kept confidential unless donors wish for their gift to be known by allowing their name to be listed in the honor roll of donors, used in campaign materials or the donor desires a naming opportunity. The campaign pledge letter has a place to indicate the donor's preference.
- Only the aggregate of board giving is made known to the full board and public and the percent of participation.
- A donor can be listed anonymously in the honor roll if so desired under a particular giving category such as Leadership Gifts \$100,000 or more or even on a room plaque simply by listing the donor as, Anonymous.
- 90% of all donors do seek recognition as they want others to know they believe in the mission.

### **Solicitor Checklist for Contacting Prospects**

**Note:** You can't raise money by writing emails and leaving voice mail messages. You **MUST** speak to the prospect from start to finish. When asking someone for a charitable gift, conversation and dialogue are required if you want to be successful. Be prepared to devote the necessary time to the process.

### **Getting the Appointment**

- Getting the appointment is vital; without it you don't get the opportunity to ask for the major gift.
- The best person to call for the appointment is someone the prospect can't say "NO" to. If that's you, fine.
- If not, you must find that other person to do it for you. A second party would say, *"I need a favor. Please meet with Jon Smith with the XYZ; it's a great organization and project. You need to hear about it. If you will meet, I'll have Jon call you to set a date/time. Thanks."*
- Regardless of who makes the call, you or someone else, the prospect should know up front that the reason for the appointment is to discuss a major gift.

- When making the appointment, use this opportunity to set the tone for the upcoming meeting. Let the prospect know that you are excited about what you are trying to accomplish on behalf your organization. Say something like:

*Mr. Jones, I am a member of the XYZ campaign team, which seeks to... The campaign is off to a good start, and I was hoping you would allow me the opportunity to personally tell you about the impact this project will have on... I am available at a time convenient for you.*

### **Confirmation and Communication to Campaign Office**

- Once you get the appointment, send a letter confirming it or an email reminder. The advantage of regular mail is you can send other documents you want the prospect to review prior to your appointment. It may also end up in the hands of his assistant so now two people in the same office know about the appointment.
- Copy the campaign staff on all appointments.
- The day before the appointment, call to confirm AND send an email confirmation as back-up.

### **Preparation for the Appointment**

- Prepare for your solicitation with the prospect by using the **Talking Points** and other materials about the campaign that have been provided to you. If you need help, call the Campaign Office.
- A **“Personal Proposal Document”** will be prepared for your use by the staff or our consultants with the amount of the “ask” and tailor the proposal to the prospect’s special interests, naming recognition or “hot buttons”. All proposals will be sent to you for use in your meeting with the prospect. DO NOT email the proposal to the prospect.
- Meet with the prospect at the pre-arranged time and place. It’s best to have two people on the solicitation team, usually one volunteer, e.g. a board member and one staff person, e.g. the CEO. Leave the **“Personal Proposal Document”** with the prospect to allow time for them to consult others, such as spouses, financial advisors or business partners. Report the outcome to the Campaign Staff.
- If you have not heard from the prospect within a week of the meeting, follow up with a phone call, not an email. Continue to follow up until the prospect makes a pledge/ gift, or declines to do so.

**Panama Canal Museum Collection at the George A. Smathers Libraries:  
A Guide to Processing, Handling, Condition Reporting, Photographing, Storing,  
Allowing Access to, Exhibiting, and Inventorying the Museum Collection in a  
Library Setting**

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2011

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## Introduction

Libraries typically collect “knowledge artifacts” in the forms of books and papers. “Knowledge artifacts” are primary and secondary sources that relay information directly through text or images. Many special collections departments within libraries also contain paper objects such as maps and photographs, but very large collections of three-dimensional objects are less common. This is mainly because three-dimensional objects are usually “cultural artifacts,” which require interpretation. Unlike “knowledge artifacts,” “cultural artifacts” do not speak for themselves. Typically, these large mixed collections are stored in museums, where museum staff, mainly curators and educators, is available to interpret objects for visitors through exhibitions and education programs. However, as is the case with the Panama Canal Museum (PCM) collection, mixed collections do end up in libraries.

The University of Florida Smathers Library has other collections of three-dimensional objects within their special collections, however, none as large as the Panama Canal Museum collection, which contains over 15,000 objects. Because the collection is so large and arriving within a short period of time, it is important to outline an efficient and effective way of processing, cataloguing, processing, photographing, and inventorying the collection. Likewise, the current storage for three-dimensional objects in the library is not large enough to store the entire Panama Canal Museum collection. Objects in the collection range in size from a very small pin to a large canoe so proper planning is imperative for designing a storage space. The library is already short of space for storing all of their collections, providing a place for students and staff to do research, and displaying objects. However, if planned properly, most of the Panama Canal Museum collection will fit into a few small storage areas (with the exception of a few larger objects that will likely need to be stored in the library’s auxiliary storage area). Recommendations for efficient and safe storage are outlined in this guidebook.

This guidebook will provide the University of Florida’s George A. Smathers Libraries Special Collections Department with a blueprint on how to process, handle, condition report, photograph, store, provide access to, exhibit, and inventory the collection from the Panama Canal Museum. Below are details listed about what topics are included in specific chapters.

### *Processing*

This section of the guidebook will provide guidance in the physical processing and recording of an object including topics such as assigning numbers, physically numbering objects, describing objects, database entry, and collecting policy.

### *Handling*

Museum staff members that have been specially trained in handling art, historical objects, or natural history specimens are the only people allowed to physically handle museum collections. As a library collection, such a strict policy on handling is not feasible. This section will build off the chapter on access, and make suggestions on determining who

will be allowed to handle the objects, if there is special handling training required, what types of gloves to use, and the requirements for a physical space for handling and research.

#### *Condition reporting*

Since many people will potentially handle the objects, the collection should be condition reported frequently. This section will tell how to conduct a condition report and provide sample forms.

#### *Photographing*

Taking photographs of the collection is important for many reasons. This section will outline the three principle reasons for photographing objects and the best ways to do it: identification, condition reporting, and publication.

#### *Storage*

This collection is much more diverse than the library is used to storing. Different types of materials require different storage conditions. This section of the guidebook will make recommendations on proper storage furniture, boxes, and atmospheric conditions for specific categories of objects in the collection.

#### *Accessing*

In museums, public access to collections is through exhibitions. Some museums, particularly university affiliated museums, allow scholars, researchers, and students accompanied by professors to access objects in storage. Access to library collections is usually the opposite. Most access is through individual access rather than exhibitions. This section will guide the library in developing a policy for accessing the collections including who can access it, where they can access the objects, and limitations.

#### *Exhibiting*

Although the collection will mostly be accessed in a storage or study area, the library has a space where they put up exhibits for short periods of times. The library has also mentioned possible plans for a permanent exhibit space for this collection as well as a possible traveling exhibition in collaboration with the Library of Congress. This section will outline exhibition procedures and conditions and include a section on preparing objects for a traveling exhibition.

#### *Inventorying*

Again, since many people will potentially access the collection, an inventory should be conducted to be sure objects are not missing. This section will make recommendations on procedure and how often to conduct inventory on such a large collection.

## Chapter One: Processing

Accessioning is “the act of recording/processing an addition to the permanent collection by means of assigning a unique number that allows the museum to connect an object to its documentation.”<sup>1</sup> Because the Panama Canal Museum collection is being processed in large quantities, it is important to establish an efficient means of recording and processing the incoming objects.

There should be a space dedicated solely to processing this collection. This will insure that objects from different collections do not get mixed together before they can be properly identified, numbered, and catalogued.

### *Numbering*

Since the collection is coming from a museum, many of the objects have already been numbered and described. The Panama Canal Museum’s system includes three or four numbers in a series that denote the donation year, the donor number, the number of items donated that year, and sometimes the number of objects within one gift, if applicable. For example:



Since the library is obtaining such a large quantity of objects in a relatively short period of time, it is possible to keep this system and continue using it for future accessioned objects. However, this system has several drawbacks. First, the number can end up being very long. Each object should be physically numbered. Having a number this long can result in the number being visible while exhibiting the object or not fitting at all if it is a small object. Second, someone who isn’t aware of the numbering system (for example, someone who comes in to study an object in the collection once) may get very confused because there are so many components. Third, if an object is found in the collection and the donor is not known, the question of “what do you put as the donor number?” comes up. Leaving the number out completely would be confusing because the number that normally designates the donor would actually stand for something else. If the library decides to stick with this system, a standard number should be used when the donor is not known (such as 00).

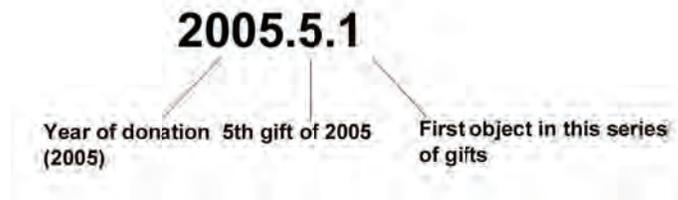
In addition, the system of numbering has been inconsistent among the objects in the PMC collection. Sometimes numbers are written as shown above, separated by periods. Other times they are written with dashes (for example 2005-040-005-001) or with abbreviated versions of the date (02-040-005-001). Sometimes the inconsistency occurs within the documentation of a single object (for example, an object will be labeled with

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<sup>1</sup> Clarisse Carnell and Rebecca Buck, *The New Museum Registration Methods* (Washington DC: American Association of Museums, 1998), p. 157

2005.040.005.001 and the documentation associated with that object will be labeled 02-040-005-001). Whether the library chooses to continue using the same numbering system that the Panama Canal Museum implemented or adapt a new one, the format that is chosen should be used consistently.

If the library would like to adapt a new system, I would recommend removing the donor number. Since all donor information should be kept in the documentation files, there is no reason it needs to be in the accession number. Here is an example:



The library has a few collections of objects within their collections, so it is necessary to have a numbering system that differentiates objects in one collection from another. An effective way to do this is to incorporate letters into all of the accession numbers in one collection. For the Panama Canal Museum collection, an abbreviation of the collection name such as “PCM” would be effective. For example, using the example above, an accession number for an object in the Panama Canal Museum collection would look like this:



When an object arrives at the library, it should be recorded immediately. The accession number should be written on the object and any documentation of the object. It is a good idea to keep a master log of numbers that have been used. This will help prevent inconsistencies that have occurred in the past as well as insure that numbers are not skipped or repeated. Each time an object is assigned a number, write that number in the log.

Objects that have more than one piece (such as the seal maker and case) can be numbered a and b. For example, PCM2002.88.12a and PCM2002.88.12b. This will alert people that the object has multiple parts.

Some objects that have arrived have no accompanying documentation and have not been assigned a number. It will be unlikely that certain pieces of information will be determinable such as donor. Record as much information as possible when the object comes in. These objects will need to be assigned a number. Since the Panama Canal Museum is continuing to collect objects until they close in 2012, the best option would be to assign these objects with a number starting with the first year the museum will be closed (2013). This will insure that the same number does not get assigned to two different objects.

## *Labeling objects*

Each object should be labeled with its assigned number. Many objects that have numbers have been labeled, however, improperly. Some have been labeled with permanent marker or in visible places. Objects should be labeled only with reversible materials and in locations that will not be visible when they are on display, if possible. Different types of materials and sizes of objects require different labeling techniques. If the library decides to continue using the numbering system that the Panama Canal Museum has established, objects should still be numbered if the format of the number on the object is not consistent with the format in its documentation.

Here are acceptable guidelines for numbering types of objects in the PCM Collection:

**General:** While you don't want to risk a number smudging or falling off, everything done to an object needs to be reversible. Objects that can be directly written on (paper, paintings, photographs) should be done so in a back corner lightly and in pencil. Objects should be consistently labeled in the same place. For example, all photographs should be labeled in the top right corner (or whichever corner the library decides).

**Tagging:** Most types of objects can be tagged with prestrung artifact tags as long as they have somewhere to feed the string through. There are benefits and drawbacks to tagging. Tagging objects can be much faster than other numbering methods, especially when processing a collection as large as the Panama Canal Museum collection. It is also fairly obvious where the tags are located on most objects, so the number is easily found. A major drawback is that the tags may become separated from the artifacts over time. They are made of string and (acid free) paper, so the paper tag may become detached if the paper gets torn or worn out. If the collection is handled often, this is a strong possibility. Tagged objects should be checked often, particularly after they have been in use (either on exhibition or for individual study) to be sure the tags are still intact. If they aren't, a new one should be attached immediately.

Tags should be numbered with pencil before attaching it to the object. The string of the tag should be threaded through an existing hole or gap (one that is not damage related). String should be cotton or another material that is pure. Silk is pure, but less durable than cotton. Do not create a hole in an object to thread the tag through. If there is nowhere to attach a tag, use another numbering method. These tags can be purchased from Gaylord.



Figure 1

Objects that cannot be labeled with pencil or tagged can be labeled using Acryloid B-72 Lacquer and ink. Here is the proper procedure for numbering objects with this method:

1. Compile the material safety data sheets for all chemicals and keep them close by.
2. Make sure you have the proper materials on hand before you start. You will need Acryloid B-72 Clear Lacquer (25% Solution) in a bottle with a brush top, Acryloid B-72 White Lacquer (25% Solution) in a bottle with a brush top, permanent black ink, acetone, artist brushes, paper towels, cotton swabs, and water.
3. Choose a well-ventilated area for labeling objects.
4. Select a clean area on the surface of the object. The area should be small and unobtrusive, but easily found.
5. Choose what color lacquer to use for a base. For dark colored objects, white lacquer can be used. For light colored objects, clear lacquer will work.
6. Make sure there is not too much lacquer on the brush. You don't want it to drip. With one steady movement, make a mark slightly larger than the number to be applied. Then, stroke again in the opposite direction to use the remaining lacquer from the other side of the brush.
7. Apply the number using a fine point brush and permanent ink once the Acryloid is dry (this should only take a few minutes). Numbers should only be written on the lacquer surface so that it does not penetrate the object's surface. Permanent ink can be used since it will not actually touch the surface of the object (the lacquer serves as a barrier). The person who writes the number should have a steady hand and good, legible handwriting. Another option is to print accession numbers on acid free paper or spun polyethylene (Tyvek), and then attach them using the method above. In this case, the Acryloid B-72 Lacquer serves as a glue to fix the printed number to the object. This insures numbers are legible. If done this way, numbers should be printed on a laser printer and the ink should be tested to make sure it does not smear when the clear Acryloid B-72 Lacquer is applied.
8. Apply a layer of clear Acryloid B-72 lacquer over the number. Make sure the ink is dry before doing this. Because drying times vary for different inks, it is recommended that you try this on a non museum object first.<sup>2</sup>

Porous objects may need multiple layers of Acryloid B-72 Lacquer before the number can be applied. Additionally, some materials, such as textiles, require different application altogether. Below is a list of specific types of objects and any special needs they have related to number labeling.

Extra large objects: Label (or tag) very large objects in more than once place. For example, the canoe in the PCM collection can be labeled on both ends on the bottom. Since there is a lot of surface area on large objects, it can take awhile to find. For this reason, it is a good idea to note in this object's documentation where the number can be found on the object.

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<sup>2</sup> National Park Service, "Use of Acryloid B-72 Lacquer For Labeling Museum Objects," *Conserve O Gram*, July 1993, Number 1/4.

Very small objects: If small objects are kept in boxes (see chapter on storage), both the box and object should be numbered, if possible. This will insure that objects are returned to the same box. Objects that cannot easily be numbered and have no place to attach a tag, such as a coin, should be very well documented photographically. A photograph of the object can be placed in the box and contained in polyester or another material that will not affect the material of the object. This will help insure that objects are returned to their proper boxes. Coins can be placed in acid free coin holders and numbered on the holder (see chapter on storage).

Ceramics: Ceramics can be numbered using the technique above. Porous ceramic objects may need more than one initial coat of Acryloid B-72 Lacquer. It is best to label ceramics on the bottom of the base or on the inside of the lip (if it is a vessel). If a ceramic piece has a handle, a tag can be attached.

Textiles: Tags should be sewn on the reverse (for one-sided objects) or in the inside (for garments). Large textiles should be numbered in two opposite corners (on the reverse side). Sometimes there are not large enough gaps to thread an existing tag through (such as the ones available from Gaylord). If this is the case, tags can be made for textiles using Tyvek. Follow the instructions above for numbering objects with Acryloid B-72 Lacquer, but instead of numbering on an object, you will number the Tyvek tag. Once the tags have dried, they can be sewn onto textile objects. All sewing should be done between the fibers of the textile. Sewing should be tight enough so that the tag does not fall off, but loose enough that it will not damage the textile. Figure 2 demonstrates the proper method of attaching a tag between the fibers of a textile. Cotton or another pure, non-dyed thread should be used. Silk is not recommended due to its fragility.

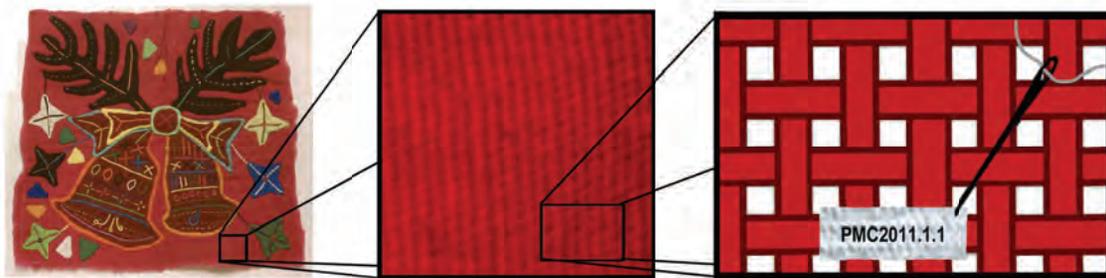


Figure 2

Metals: Metals can be numbered using the technique above. Areas that are corroded or have painted decoration should be avoided.

Paper: Paper objects, including written documents, photographs, works of art on paper, maps, books, certificates, diplomas, yearbooks, brochures, stickers, newspapers, stamps, and programs, should be labeled with pencil in an unobtrusive place. Press lightly so no indentions are created. Three-dimensional paper objects can be tagged rather than written on. This may include objects such as books and gift bags. Some modern photographic paper resists #2 pencil markings. These can be labeled using a #1 or wax pencil.

Paintings: Paintings should be marked on the reverse on the stretcher bar or wood panel. Never mark a painting on the front or on the reverse of the canvas. Paintings can be labeled with Acryloid B-72 Lacquer using the technique outlined above. Sometimes, there are areas on the back of the canvas support where a tag could be attached.

Wood: Wood objects can be labeled with Acryloid B-72 Lacquer using the technique outlined above.

Plastic: Plastics can be complicated to label because their chemical composition is often undeterminable. It is best to label plastic objects using an archival tag.

Leather: Leather objects should be numbered with tags. The string with the tag should be threaded through an existing hole in the leather. Do not write directly on leather or attempt to use Acryloid B-72 Lacquer as this will permanently damage the material.

### *Cataloging*

Many objects that have arrived at the library have printout sheets from PastPerfect, a database commonly used in museums. These printouts have some information about the object. It is important that this information is retained. For objects that have come in without any documentation or numbers, record as much information on that object as possible when it first arrives at the library. In many cases this information may only consist of a physical description and size.<sup>3</sup> If there are any captions or markings on the object, record those. Since members and volunteers from the Panama Canal Museum will continue to be involved, the library can use them as a valuable resource for identifying objects and the object's significance to the American Era of the Panama Canal Zone. Be sure to record as much information as they provide as possible. You may ask if they mind being recorded or a form can be devised that helps keep information organized. This information can then be used in the library's database and catalog for searching for objects. The Panama Canal Museum should be contacted before they close to be sure there is no existing information on these objects. In many cases, legal issues will not come up. However, it would be in the library's best interest to know that the Panama Canal Museum does own these objects and has the right to deaccession and transfer them to the library. Additionally, the library will need to know if there are any restrictions in the deed of gifts for these objects that may make stipulations on how they can be exhibited or deaccessioned. If the library decides to deaccession any of these objects, they will need to show that they have the authorization to dispose of these objects. Without a proper title, showing ownership could be much more difficult. It is best to try to obtain this information while the museum is still open.

There are also several Pre-Columbian pottery pieces in the Panama Canal Museum's collection. These can pose a problem for the library if the donor of these objects and the Panama Canal Museum does not have enough provenance information to prove they were

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<sup>3</sup> Sandra Varry, "Photographic History, Preservation, and Digitization: Skills and Strategies for Working with Collections," Workshop given at the Society of Florida Archivists Annual Meeting in St. Augustine on May 4, 2011.

imported prior to 1983. In 1983, the UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural property went into effect, as law, in the United States. The law states:

Section 307 (19 U.S.C. § 2606): Import Restrictions. No restricted materials exported from the State Party may be imported into the U.S. without an export permit issued by the State Party (country of origin), or other documentation showing that it left the country of origin prior to the imposition of restrictions. Such import restrictions are applicable even if the material is imported into the U.S. from a country other than the country of origin.

Since Americans were in the Panama Canal Zone for such a long span of time prior to 1983, it is possible the Pre Columbian pottery pieces in the PCM collection were imported to the United States prior to the law going into effect. If the objects were imported prior to 1983, it is legally permissible to buy, sell, and have possession of most artifacts that are in the country prior to that date. However, the donors of the objects and the staff at the PCM should provide the library with proof of provenances and ownership that verifies these objects were imported prior to 1983. This law applies to all antiquities, not just Pre Columbian artifacts.

#### *Databases*

The library has several systems that are used for cataloguing various collections within the library. The library catalog contains most descriptive information on the collections. Therefore, the best option is to integrate the PCM collection into the library catalog so it is easily searchable by patrons and the library staff. Some of the PCM collection is searchable and viewable on the Digital Library of the Caribbean, an initiative that was started by the University of Florida in 2004. This database allows users to search for objects using title, publisher or author, date, type, and some keywords. There are also images of every object on this database. As it currently exists, there are four collections available from the University of Florida on the Digital Library of the Caribbean. When searching for an object, there is no indication which collection it is coming from. This should be added. Adding the physical location in which the object can be found, a physical description of the object, and the accession number that gets assigned to the object would also be helpful to those hoping to view the object in person. This database can serve the public, especially those who wish to view the collection but aren't able to travel to Gainesville to see it in person. Here are links to the Panama Canal Museum collection in the Digital Library of the Caribbean:

<http://dloc.com/pcm>

<http://dloc.com/pcm/all>

Separate files, to be used by librarians and collection managers, should also be kept. These files should include a photograph of the object, title, material/medium, physical description of the object, object type, condition report, location, donor information, a

copy of the deed of gift, insurance value (or an appraisal), the accession number, measurements, and exhibition history.

As the objects are catalogued and physically processed, they should be placed in safe storage conditions. Currently, the Panama Canal Museum collection has a semi-permanent storage space on the first floor of Library East, located next to the conservation lab. As much as possible, objects should be arranged according to type (i.e. all photographs together, all wooden objects together, all paintings together, etc...). Should space and money become available, ideal storage conditions are outlined in chapter five. .

### *Collecting plan*

The Panama Canal Museum collection is large, with an estimated 12,000+ objects. Some objects are duplicates (such as three yearbooks from the same school and year). The library is accepting the collection in its entirety and will continue to accept donations. Therefore, it is important for the library to write a collecting plan. This will keep the collection from getting too large by maintaining a single focus, refusing duplicate objects or objects that do not meet the mission, and deaccessioning objects that do not meet the mission of the collection, are duplicates, are in poor condition, or are not able to be safely cared for and stored by the library.

The library should form a collections committee specifically for this collection that can make decisions on accessioning and deaccessioning objects into the PCM collection.

The best place to start research for what the collecting plan should include is the mission statement. Although the Panama Canal Museum is closing, their mission statement can still serve as the collection's guiding mission statement. The Panama Canal Museum's mission statement is:

The Mission of the Panama Canal Museum is to document, interpret, and articulate the role played by the United States in the history of Panama, with emphasis on the construction, operation, maintenance and defense of the Panama Canal and the contributions to its success by people of all nationalities.<sup>4</sup>

The collecting plan should take into consideration what types of objects are already in the collection, what types of objects will and will not represent the mission statement, and what objects the library has the capacity to store and properly care for. Students and scholars who are using the collection for research will benefit from a concise collecting plan because they will not have to waste time weeding through objects that are not relevant to the collection's main focus.

When newly donated objects are added to the collection, a deed of gift should be completed. The library should use their existing system for accepting donations, if

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<sup>4</sup> Panama Canal Museum Website, *Mission Statement*, accessed May 7, 2011, <http://panamacanalmuseum.org/index.php/about/>.

possible. This will make the paperwork and procedure much easier since the library staff is likely already familiar with the process. Only gifts without restrictions should be accepted except in special circumstances. Special circumstances should be discussed among the members of the collections committee and the head librarian, curator of the collection, conservator, or anyone else not on the committee who the restriction may impact to be sure that the restriction can be accommodated. It is unlikely the library can make promises to continually exhibit objects, conserve objects in very poor condition without an additional monetary gift, or make excessive use of donor plaques or donor written accompanying material.

The collecting plan should outline the justification and process of deaccessioning objects. When deaccessioning, the best course of action is to donate the objects to another museum, library, or archive for educational purposes. In anticipation of their closing, the Panama Canal Museum has decided to donate their extensive collection to the University of Florida Smathers Libraries. If the library decides to deaccession any objects, they should first be offered to a museum or another library.

There are many reasons to deaccession objects, such as the object is beyond the scope of the collection, there are duplicate objects, or that the library cannot reasonably care for and store these objects. There are several objects in the collection that fall into the categories. For this collection, the best time to make deaccession decisions is upon arrival and during processing at the library. At this time, objects that are candidates for deaccession can be set aside. Be sure to take into account if any donors have made restrictions on his or her gifts.

## Chapter Two: Handling

Since students, professors, the public, and other academics will use the collection frequently, it does not make sense to restrict handling to only library staff. However, objects are most vulnerable to incur damage while being handled, so precautions must be taken and rules should be put in place for those who handle the collection. Objects that are damaged should not be handled by non-library staff and should be sent to the conservation lab for evaluation, stabilization, and treatment.

This chapter is broken up into handling instructions for the two groups of people who will handle the collection the most: library staff who process the collection and retrieve requested objects and non-library staff who use the collection for research purposes. There are also general rules for handling objects that apply to everyone that will be addressed first.

### *General rules*

When handling objects, do not wear jewelry that protrudes or could get caught on any type of object. Key cards should not be worn around the neck because they could get caught on an object. Gloves should be worn when handling objects, except in cases when an object is too slippery. Only cotton and nitrile/vinyl gloves should be used. Latex should be avoided since many people are allergic to it. If gloves cannot be worn, make sure to wash and dry hands thoroughly before touching any objects.

Never run or walk backwards when carrying objects. Walk slowly and be aware of your surroundings. Before you pick up an object, know where you plan to set it down. You should never lift one object over another. Objects should be carried one at a time, no matter how small. If an object is large, heavy, or awkward, ask for help with moving it. Do not hand objects from one person to another. Instead, set it down on a stable surface and have the other person pick it up.

Handle objects as little as possible. When picked up and moved, handle the object in its most stable position. This is usually (but not always) the position in which it is stored.

Do not eat, drink, or smoke around objects.

When handling works or arts or historical documents (including paintings, photographs, drawings, etc...), never touch the front where the image or writing is located. Carry paper objects that have no secondary support (e.g. backing board) in a rigid folder that is slightly larger than the object. Use a sheet of paper or microspatula to lift a piece of paper from a surface. Do not try to get under it with your fingers as this may result in creasing or bending of the corner of the paper.

Carry framed objects with one hand on the side and one hand on the bottom. Do not carry framed works by the hanging wire or the top of the frame.

### *Library staff*

Library staff will be handling objects while processing the collection and later when objects are requested for study by library patrons.

Many objects have arrived packed together, loosely, in boxes. Without knowing what is inside, it is difficult to determine how to move the box to make sure the contents don't get damaged. If possible, open the box to see what types of objects are inside before moving it. If this is not possible, locate a stable surface as close to the box as possible. Pick up the box slowly and walk very slowly, being careful to keep the box level so that objects do not roll around. Remove objects individually from boxes, starting with those on the top. Only move one object at a time and always use two hands even if it is a small object.

When retrieving objects for study from the storage areas, use a cart to transport objects. Carts should have at least a 3-4 inch lip so that objects cannot roll off the side and should be padded. If there are very few, flat objects that need to be moved, they may be carried in solander boxes from the storage area to the study room.

When transporting objects to different floors of the building, elevators should be used. The entire cart can be pushed into the elevator. If an elevator is not accessible, carts should be available on each floor for object transport. Objects should be put on a cart and moved to the staircase. Objects can then be carried, carefully, one by one, up the staircase to another cart at the top of the staircase. Someone from the library staff should always remain with each of the carts as to not leave objects unattended.

Staff should make sure that library patrons and new library staff understand how to properly handle objects in the collection. Staff members are responsible for making sure library patrons read and sign a form acknowledging they have read and understand the rules for accessing the Panama Canal Museum collection.

### *Library Patrons*

Library patrons using the PCM collection may range from undergraduate students to secondary school teachers to college professors and will have varying degrees of object handling knowledge. Generally, anyone using this collection will understand that the objects are irreplaceable and should be handled with care.

In addition the general rules of object handling, library patrons should read and sign a form acknowledging they understand and agree to comply with library rules and regulations for object study. An example of this form can be found in chapter six on access.

Only use pencil when writing around objects.

All backpacks and oversized purses must be stored in lockers or behind the librarian's desk.

Patrons may not take objects in the PCM Collection out of the library study room.

## Chapter Three: Condition Reporting

Damage can occur to objects instantly or over time so it is important to monitor their condition. The best way to do this is through condition reporting. This chapter will include sections on when to conduct condition reports, how to perform them, and provide sample examination forms to use.

### *When*

Damage can happen during transport, while objects are in use, or gradually over time. Objects should first be condition reported when they are brought into the library and being processed. Objects are being shipped together in boxes in vehicles that were not designed to transport museum objects. Objects that are damaged excessively during transport should be taken to a conservator or deaccessioned.

Objects should also be condition reported after they are used (both by library staff and patrons). You cannot count on the person using the object to report damage. Some damage can occur without the person noticing or someone may panic about causing damage and fail to report it.

Objects that are vulnerable to damage should be flagged during processing and the initial condition report. Damage may be a result of poor handling, an accident, or an inherent flaw in the object. The library should examine and condition report these objects regularly to be sure that the damage has not worsened. If it has, a conservator should be contacted.

If objects are exhibited or loaned to other institutions, condition reports should be conducted prior to the object going on exhibit or out on loan and upon closing of the exhibit or receiving it back from a loan.

### *How*

Before you begin an examination and condition report, make sure that you have an area set up and all the tools you will need to conduct the condition report. Here's what you will need:

- A clean, white surface upon which to set the object
- Pencils
- Examination forms and extra paper
- Computer
- Camera
- Tape measure
- Ruler
- Gloves (white cotton or nitrile)
- Flashlight
- Loupe or other magnifier

- Natural hair brushes
- Tweezers

Objects should be examined in a clean, well-lit area. Conducting examinations on a white surface will help the examiner notice any part of the object that is flaking or cracking off. Photograph, measure, describe, and save any debris that comes off during examination, including dust. This should be shown to a conservator to further evaluate the condition. Broken pieces or debris should be stored in archival grade plastic zip lock bags or in boxes. The bag or box should be labeled with the object's accession number and a short description of how the piece fell off and what part of the object it is from.

Follow the guidelines in chapter two on handling while conducting condition reports. When writing a condition report, it is a good idea to make note of any areas that may be weak. This will help insure that future handlers will not grab the object in this area. If there are cracks, chips, or breakages, measure their length and width and record the location on the examination form. Photograph the damaged or weak area. For two-dimensional objects (including paintings, although they are not truly two-dimensional), record damage in terms of proper right and proper left.

A flashlight or other light source can be used to create raking light. Raking light is a light source that comes from the side so that certain irregularities or other types of damage can be noticed. If you can determine whether damage is chemical, biological, mechanical, or inherent in nature, record it.

A glossary of terms related to damage that objects in the PCM collection are vulnerable to can be found at the end of this chapter.

### *Forms*

A condition report should include information about the object such as the accession number, object composition, physical description, title, artist or maker, medium, size, and date created. The date of examination and examiner should also be noted on the condition report. The report should also include the type of damage, the extent of the damage, the location of the damage, previous repairs, and cause and date of damage (if known). A photograph of the object should also be included with notations of where damage is located. You may use a color-coded system, but be sure to note what different colors or type of lines mean next to the photograph (see sample condition reported photograph below). If the object is a three-dimensional object or the reverse is important of a flat object, include images of all sides. Be sure to record on the form is the damage is located on the front or back of a two dimensional object.

Be sure that all condition reports and documentation of examination are on archival materials or in archival formats. You may record condition reports on the computer, but back them up in case of unexpected computer problems or power/server outages.

**University of Florida Smathers Libraries Panama Canal Museum  
Object Condition Report**

**Documentation:**

Accession Number \_\_\_\_\_

Title/Description \_\_\_\_\_

Artist/Maker \_\_\_\_\_

Medium/Material Composition \_\_\_\_\_

Date Created \_\_\_\_\_ Number of Components \_\_\_\_\_

**Condition:**

Describe structural and surface conditions (e.g. tears, losses, cracks, chips, holes, foxing, abrasion, scratches, tape residues, mold, buckling, discoloration, stains, flakes, patina) and any other conditions, and note location:

Please refer to photograph and/or diagram on reverse.

Examiner \_\_\_\_\_ Date \_\_\_\_\_

Needs Conservation Work? Y or N

Needs Monitoring? Y or N

1884-50-191



abrasion



staining



media loss



tide line



foxing



problem

problem

1884-50-191 Rhaellino da Reggio Madonna and Child Before Treatment Normal Light

## **Glossary for common terms related to the damage of objects in the PCM collection**

**Abrasion:** A wearing or tearing away of the surface caused by scraping, rubbing, grinding, or friction.

**Accretion:** Any external material deposited on a surface (splashes, drips, flyspecks etc...)

**Biological damage:** Damage that weakens an object's structure as a result of pests or mold.

**Chemical damage:** Damage as a result of a reaction between a material and an energy source (heat, light) or a chemical (water).

**Chip:** A defect in the surface caused by material that has been broken away.

**Corrosion:** The chemical alteration of a metal surface caused by agents in the environment or by reagents applied purposely. Corrosion may affect an object's color or texture without altering the form (such as bronze disease) or it may change the color or texture (such as patina or rust).

**Crack:** A surface fracture or fissure across or through a material. No loss is implied.

**Crease:** A line of crushed or broken fibers generally made by folding.

**Delamination:** A separation of layers; splitting.

**Dent:** A defect in the surface caused by a blow.

**Discoloration:** A partial or overall change in the color caused by aging, light, and/or chemical agents. Yellowing or darkening can occur, along with bleaching, fading, and the loss of color or a change in hue.

**Distortion:** A warping or misshaping of the original shape.

**Embrittlement:** A loss of flexibility causing the material to break or disintegrate when bent or curled.

**Ferrotyping (photographs only):** Glossy patches found on the surface of photographs; resulting from lengthy contact with a smooth-surfaced storage enclosure such as polyester or glass.

**Fold:** A turning over of the support so that the front or back surface is in contact with itself.

**Foxing:** Small, yellow, brown, or reddish-brown spots on paper; caused by mold or oxidation of iron particles in paper.

**Fraying:** Raveled or worn spot indicated by the separation of threads, especially on the edge of a fabric.

**Frilling (photographs only):** Separation and lifting of the photographic emulsion from the edges of the support.

**Inherent fault (inherent vice):** Weakness in the construction of an object or an incompatibility of the materials that constitute it.

**Loss:** missing area or hole.

**Missing element:** Loss of an integral component of the object such as a handle or tassel.

**Mold:** Biological in nature and can come in the form of colored, furry, or web-like surface excrescences and be of musty odor.

**Patina:** A colored surface layer, either applied or naturally occurring.

**Pest damage:** Surface loss, tunneling, holes, fly specks, etc... obviously caused by insects or other pests.

**Physical damage:** Damage caused by mechanical stress (i.e. handling, improper storage).

**Scratch:** Linear surface loss due to abrasion with a sharp object.

**Sheen:** A polish produced by handling, often occurring on areas that are frequently touched.

**Soil:** A general term denoting any material that dirties an object.

**Stain:** A color change as a result of soiling, adhesives, pest residue, food, oils, etc...

**Tarnish:** Dullness or blackening of a bright metal surface.

**Tear:** A break in fabric, paper, or other sheet material as a result of tension or torsion.

**Wear:** Surface erosion, usually at edges, due to repeated handling.

**Wrinkling:** An angular, crushed distortion.

## Chapter Four: Photography

Photographing the collection is important because it aids in the documentation of the objects (for identification and condition reporting purposes) and is an additional means for which the collection can be displayed in digital form. Quality photography is necessary, but it doesn't need to be outsourced to a professional photography studio. The library already owns the equipment needed to take good photographs and has an entire department, the Digital Library Center, dedicated to digitizing collections. Although most of the photography and digitization can be done in-house, it is still expensive. Web space, hard drive space, and staff time all cost money. Fortunately, money is often available through a variety of granting agencies that fund digitization projects. The National Endowment for the Humanities (NEH), National Endowment for the Arts (NEA), and the Institute of Museum and Library Services (IMLS) are good places to look for grants.

If the Digital Library Center cannot do the photography and digitization of the collection, it is possible to hire a student or have another staff member who is interested in photography or digitization practices to do the work. This can be worked out in a variety of ways; the student could be a student assistant, a graduate assistant, or a student receiving credit (essentially volunteering). In any case, if a student or staff person is used, the library will need to provide him or her with access to all the equipment they will need to photograph the collection and the student will need to be trained in proper object handling procedures.

Equipment photographer will need access to:

- Computer with adequate storage space
- Digital camera
- Photo editing software (such as Adobe Photoshop)
- Easel
- Lighting kit
- Seamless (backdrop material)
- Tripod
- Lighting kit
- Small chalkboard or dry erase board

Photographing an object:

After you have secured the object that you plan to photograph, place the small chalkboard or dry erase board next to it with the object identification number written on the board. Next, center the tripod and camera in front of the object and frame it in the viewfinder of the camera. The object should take up as much space in the viewfinder as possible. Be sure that the face of the lens and viewfinder are parallel to the surface the object is sitting on. To properly light an object, the photo floods should be raised to the same height as the camera and be placed about six to eight feet away from the object. The reflectors should be turned toward the object and should form an angle of about 45 degrees with the object. Before taking photographs of the object, look through the viewfinder to make sure

there is not any glare of shadows that interfere with getting a clear picture of the object. The photo floods and reflectors may need adjustments depending on the size and shape of an object. Certain aspects of the image can be altered later in photo editing software, but it is much easier to get the color correct and eliminate cast shadows while you are taking the photograph than try to change it later.

Digital images can be shot and stored as different file types. RAW files are very large files that have to be converted into another form later in order to use. They are versatile because of their ability to be converted into several other formats without losing any image quality. TIFF files are large, uncompressed files and are good for making reproductions, but are not easily readable by all computers. They are a good way of storing files, but not publishing them online. JPEG files are smaller, compressed files that are not good for making reproductions from. However, most computers will read JPEG formats and JPEGs can be used for publishing images of objects online or in a catalogue/online database.

There are several types of objects in the collection that would be better off scanned rather than photographed. Examples of these types of objects are documents, maps, posters, photographs, negatives, and slides. These can be scanned on flatbed scanners or in slide scanners at a resolution of at least 600 dpi for photographs, maps, documents and 4,000 dpi for slides and negatives.

Although digital images are less fugitive than printed photographs and film, all technology has its flaws. Servers and computers can crash or someone can accidentally delete digital files. Therefore, it is important to back up all digital images and files. This can be done online, on external drives, on large capacity CDs and DVDs, or on a flash memory stick.

The photograph and scanning process will take a long time since there is a large quantity of objects that need to be documented. It will be necessary to download them onto the computer several times because the project is complete. It is also possible that the same person will not do all of the photography and scanning so it is important that a standard is set on naming the photographs and scans of these objects. I would recommend putting them all on a share drive titled Panama Canal Museum Object Photographs and making access to editing files in that folder limited. A good system for naming the individual files would be an abbreviation for the Panama Canal Museum followed by the object number (for example PCM 2005.5.1. This will make images of objects easier to find. It may take a little longer initially, but it will help if the scanning and photographing is done in increments of 50-100 objects at a time. In the long run, taking the time to properly coordinate the file numbers with the object numbers will save a lot of time and frustration. Keeping this in mind, it is important to make sure all objects are assigned numbers when they arrive at the library.

## Chapter Five: Storage

In accordance with the Panama Canal Museum's mission to document, interpret, and articulate the role the United States played in the history of Panama during the construction, operation, maintenance, and defense of the Panama Canal, the museum obtained its collection primarily from donors who lived in the Panama Canal Zone during the American period.<sup>5</sup> For this reason, the collection is diverse both in media represented and size of objects. Different materials require different storage conditions. This chapter gives general storage guidelines, which are followed by storage recommendations for specific categories of objects in the collection.

### *General Storage Guidelines*

Good storage facilities can help reduce the risk of damage to objects. It is very important that there be an area dedicated only to storing objects. Object study, photographing, and all other activities should take place in another, designated location.

Ideally, a centralized HVAC (heating-ventilation-air conditioning) or climate control system, which will maintain temperature and relative humidity at constant levels, should be installed. Fluctuations in temperature and relative humidity can cause damage to objects by allowing them to expand and contract. Smathers Library (Library East), the location where this collection will be stored, already has a centralized HVAC system installed for the whole building. A solution to climate controlling the storage rooms would be to have each room on its own temperature control within the existing system. If necessary, humidity can be adjusted using a humidifier or dehumidifier. Hygrothermographs, devices that record and output information on the consistency of temperature and relative humidity, should be placed in every storage space. These should be checked often (every week). If temperature controlling each storage space is not an option, closed storage cabinets can help create microclimates.

Different materials require different constant temperature and relative humidity. With a mixed collection as large as the Panama Canal Museum Collection, a compromise will have to be struck. The New Museum Registration Methods recommends temperature be kept between 68°-72° F (20°-22° C) with a constant relative humidity between 45-55% for mixed collections. However, this relative humidity may still be too high for some objects such as photographs, unstable metal objects, and unstable glass. If possible, two or more small storage rooms should be dedicated to this collection. Objects that require similar conditions should be grouped in the same room. Although the ideal situation is to keep the entire collection together, the collection can be separated if proper storage is only possible if separation occurs (e.g. photographs in the PCM collection can be stored with photographs from other collections because there is an existing space dedicated to and designed with proper temperature and humidity controls for photographs).

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<sup>5</sup> The Panama Canal Museum website. "The Panama Canal Museum Mission." Accessed March 29, 2011. [http://panamacanalmuseum.org/index.php/about/our/the\\_panama\\_canal\\_museum](http://panamacanalmuseum.org/index.php/about/our/the_panama_canal_museum).

Rooms designated for storage should not have windows. If there are windows in the room that has been designated for storage, a barrier should be placed over the window that does not permit light to come into the room. Lights in the storage areas should remain turned off except when someone is accessing the area. Light affects different types of materials in various ways, but causes permanent, irreversible damage. Objects that are especially sensitive to light, such as textiles, photographs, paper objects, should be kept in an enclosed storage cabinet or archival grade boxes. Fluorescent bulbs can be used in storage areas as long as they have UV filters.

Objects should be stored in as natural a position as possible. For example, clothing or other textiles should not be folded and hats should be supported from the inside with tissue or foam to retain the form they would have if being worn on someone's head. An exception to this is objects that are more stable on their side. However, supports can be purchased from a number of archival supply manufacturers that help stabilize objects that don't stand on their own (such as round objects).

Many objects arrived at the library in the same box (as is shown in the images below). This is not a good method of storage for a few reasons. First, materials from different objects can cause damage to other objects in the box. Second, some objects are folded. Third, someone who wishes to access an object in the box would have to move and sort through all of the objects in the box. This could cause damage and misplacement of objects.



Figure 3



Figure 4

Objects (including boxes with objects inside) should not be crowded or stacked on top of one another in storage. Someone should never have to reach over an object to get to another object. Every time an object is moved, there is risk of damage. Therefore, it is important to prevent any unnecessary moving of objects.

The Panama Canal Museum Collection contains over 10,000 objects, so preventing crowding may be difficult. Crowding can be minimized by careful design of a storage facility and using space as efficiently as possible. There are many manufacturers that specialize in museum storage equipment. Here is an abbreviated list of vendors:

Southwest Solutions

<http://www.southwestsolutions.com/markets/museums>

Donnegan Systems

[http://www.donnegansystems.com/Drawer\\_Cabinets.html](http://www.donnegansystems.com/Drawer_Cabinets.html)

Delta Designs, Ltd.

<http://www.deltadesignsltd.com/>

There are storage solutions for objects of all sizes and materials. Once the permanent storage space has been decided on, specific furniture can be ordered. In an ideal situation, storage would incorporate a combination of closed cabinets with shelves and drawers, flat files, and painting screens. If closed cabinets will not fit or are too costly, open shelving can also be used. Dust covers should be employed if open shelving is used. All shelves should be lined with archival grade foam.

Below are storage recommendations for categories of objects with solutions presented using objects from the Panama Canal Museum Collection.

Object handling and security/access are also important aspects of storage. These topics will both be discussed in their respective chapters.

### *Extra Large Objects*

There is not space within the Smathers Library to house some of the larger objects in the collection. They will be stored at the Library Auxiliary Storage Area. It is important that these objects have the best conditions possible. It is possible to create microclimates for these large objects by storing them in closed cabinets that have sulfur-free gaskets. This will help minimize environmental fluctuations inside the cabinet. Solutions for storing extra large objects will be handled on a case-by-case basis.

Examples of large objects in this collection: canoe

A canoe presents a storage dilemma because you cannot simply lay it down on one side. If you do, it can cause damage as moisture and mold may collect on the side touching the ground. It also increases the likelihood of infestations. The best solution is to build a mount for the canoe that will keep it at least six inches off the ground. This can be done for a reasonable cost using 9 pound polyethylene foam, which is thick like wood, and polysuede as a buffer between the rougher foam and the canoe. Here is a diagram provided by Atlas Fine Art Services:

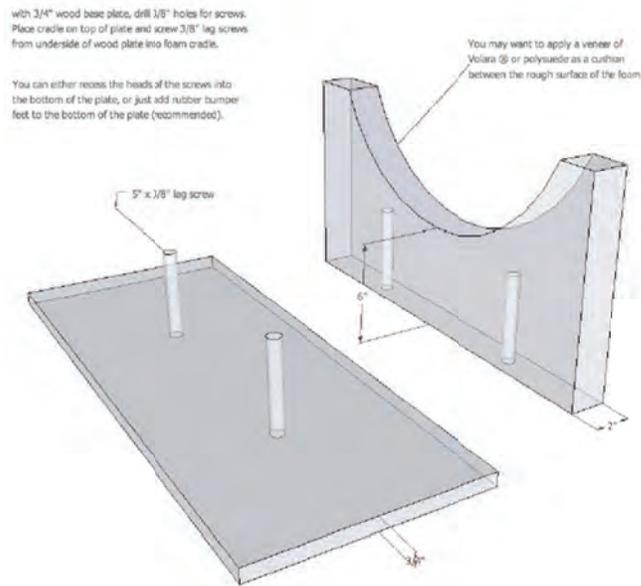


Figure 5: Mount for a canoe

This is a good solution since it isn't very expensive and can be made in house easily. A downside is that the mount may not be very attractive. If the canoe is ever exhibited, a separate mount will need to be made.

Additional resources for storing extra large objects: National Park Service, "Creating a Microclimate For Oversized Museum Objects," *Conserve O Gram*, July 1993, Number 4/4, <http://www.nps.gov/history/museum/publications/consveogram/04-04.pdf>.

### *Very Small Objects*

Very small objects present the opposite problem of extra large storage areas. How will you store them without them getting lost? Depending on the type of object, there are many solutions. One option is to purchase archival boxes that have separators inside. Each object will be placed in a section of the box. The boxes can then be placed on shelving or in cabinets. Here are examples of this type of box:



Figure 6



Figure 7

Many archival supply companies sell these boxes. These particular examples were taken from Hollinger Metal Edge. The boxes on the left will protect objects from excessive light exposure since they have solid lids. Although boxes should be labeled on the outside with which objects they contain, the boxes on the right will make it easier to identify objects without opening them. Boxes containing light sensitive objects should have solid lids. Boxes with clear lids are better suited for objects that are not light sensitive.

Another option is to purchase small, individual archival boxes and put them inside a flat file cabinet or cabinet with drawers. Here are examples of this solution:



Figure 8



Figure 9

These are also available from many archival supply companies. The boxes on the left are available from Hollinger Metal Edge and the boxes on the right are available from Gaylord.

The library may find using both systems a good solution. For example, the Panama Canal Museum Collection contains small pieces of Pre-Columbian pottery. It is likely that someone who wishes to study these objects would want to see more than one. Storing these in one box with separators (the first solution) would make handling and transporting these as a group much easier. There are also objects in the collection that people may want to study individually, such as a class ring. Rather than moving many objects by moving an entire box (and risking damage to those objects), it would be easier to just move a single box containing the class ring. In this case, the second solution would be better.

For both of these solutions, accession numbers should be written on the outside of the box or drawer to save time and minimize opening more boxes than necessary.

Boxes should be lined with either an archival foam (Plastazote or ethafoam) or acid free tissue paper. These materials are available from Gaylord and Hollinger Metal Edge. Gaylord has shredded acid free tissue available. This is a good solution because it allows for packing around the sides of the object, which keeps it from shifting while being moved and is much more economical than foam.



Figure 10



Figure 11



Figure 12

The Pre-Columbian ceramics have been rehoused in acid free boxes (see images below). This is a good solution for these objects. The boxes still need to be lined with either foam or acid free tissue paper. These objects are fragile so ethafoam that is cut to the shape of each object is a good option. Even though each section of the box is labeled with what each object is, each object will also need to be numbered or tagged (see section on numbering objects in chapter 1).



Figure 13



Figure 14

Examples of very small objects in this collection: coins, high school class ring, jewelry, pins and medals, patches, Pre-Columbian ceramics (rattles, whistlers, pipes).

### *Ceramics*

Ceramic objects in the collection range from small pieces of Pre-Columbian ceramics to modern mugs. The amount of glazing and firing the ceramic has gone through impacts its sensitivity to temperature and relative humidity. For example, Pre-Columbian ceramics are more sensitive to temperature and relative humidity changes than modern mugs that have been mass-produced (and probably run through the dishwasher a few times). The New Museum Registration Methods recommends 45-50% relative humidity for ceramics such as the Pre-Columbian ones in this collection. For glazed and fired ceramics, 55% relative humidity is recommended.

Depending on the size of the objects, they can be stored in a variety of ways. Artifact storage boxes come in a variety of sizes and are suitable for objects of the same material. Again, these should be lined with either an archival grade foam or acid free tissue.

If there are objects that are too large to fit in boxes, but aren't considered extra large (such as the canoe), they can be stored directly on a shelf on a shelving unit or inside a

cabinet. Foam rings can be used if objects are rounded or need extra stabilization. These are available from Gaylord.



Figure 15



Figure 16

Examples of ceramics in this collection: Pre-Columbian whistles, rattles, and pipes, mugs

### *Textiles*

The term “textile” includes anything made of a type of fabric or fiber. There are several different types of textile objects in this collection including shirts, hats, bandanas, scarves, Mola cloth, flags, and rugs. Because, when laid flat, textile objects tend to be large, there is a tendency to fold them. Folding should be avoided if at all possible since folding fabric objects can cause stretching in the areas of folds, thus resulting in damage. If there are extra large textiles, they should be rolled rather than folded. A lining of acid free tissue should pad the inside of the textile when it is rolled. An exception to this is padded quilts and other thick textiles. These should be folded rather than rolled and padded to reduce the fold creases.

Generally, textiles should be stored at 40-50% relative humidity. This is about the same requirement for ceramics, so these two materials could be stored in the same room.

There are storage boxes and materials made specifically for types of textile objects. Many manufacturers make flag boxes. These are a triangle shape and require the flag to be folded. Since this is a military tradition in the United States, it is generally an accepted storage method. Good instructions on how to fold a United States flag according to the Army and Navy custom are available at this website:

<http://www.usflag.org/foldflag.html>.



Figure 17

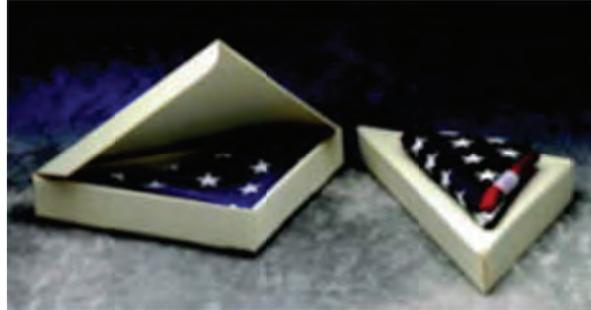


Figure 18

The box on the left is available from Gaylord and the boxes on the left are available from Hollinger Metal Edge.

There are also small, souvenir type flags that are made of a synthetic, thin fabric in this collection. The colors are not very lightfast and extra care should be taken to ensure that these do not receive unnecessary light exposure.



Figure 19



Figure 20

There are several types of hats in the collection including baseball hats and berets. These should be stuffed with acid free tissue to mimic the form in which they would be worn. It is important not to overstuff the beret. A beret does not fit over the whole head like a baseball cap, but rather, sits on top of the head.



Figure 21



Figure 22

Currently, the beret is stuffed a little too much. The tissue paper needs to be replaced with acid free tissue. This type of hat can be stored in an appropriate sized acid free box.

There are also several baseball caps in the collection. Gaylord sells boxes specifically for baseball caps. Baseball caps can also be stored in regular, appropriately sized archival boxes.



Figure 23

Additional types of hats should be stored in the same manner, stuffed with acid free tissue to mimic their natural form and in acid free boxes.

Hats may also be stored on mounts specially made to fit the hat. Most hats do not follow the shape of the human head, so hat mounts used in store windows are not ideal for long-term storage.<sup>6</sup> These can be outsourced or made in house. It is typically more economical to purchase the materials and make them in house, but companies such as Bill Mead, Museum Mount Maker will make custom mounts. One additional benefit to storing hats on mounts rather than in boxes is that if they were ever to be exhibited, often the mounts can be designed so that very little is seen and the part that is seen is minimal and tasteful so they can be used during exhibition. The Philadelphia Museum of Art stores hats in their costume and textiles collection on custom made mounts on shelves in compact storage.



Figure 24

Smaller types of textiles such as bandanas and scarves (example in the picture below) should be laid flat.

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<sup>6</sup> Claire F. Meyler at the Oakland Museum of California, "Caring for Our Collections," <http://museumca.org/blog/start-here-caring-our-costumes>, posted December 30, 2010, accessed June 25, 2011.

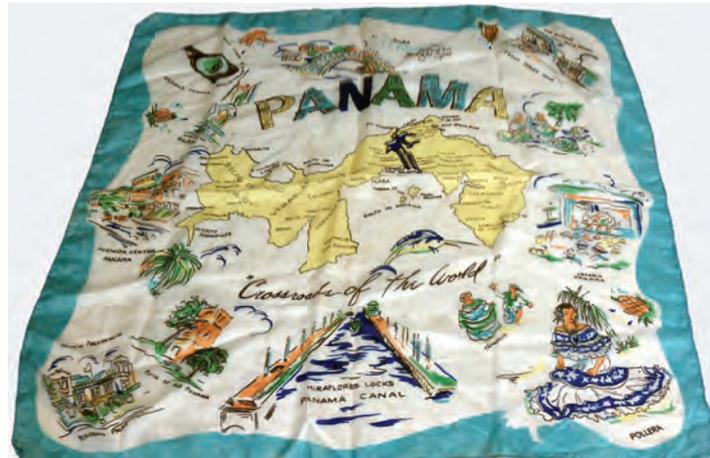


Figure 25

There are thin archival boxes available for storage, but another option is to store them in flat files or drawers in cabinets with several layers of tissue and sturdy acid free buffer paper or board between them. If storing them this way, be sure that there is a piece of paper or board under every object. The paper or board should be thick enough not to give into the weight of the object when picked up. This will allow for easily moving them, by picking up the paper instead of the object. This is available for purchase from Gaylord and Hollinger Metal Edge in a variety of sizes and weights. I would recommend purchasing a light color such as white or cream. This will alert staff of debris or parts of the object that fall off or the presence of insects.



Figure 26



Figure 27

Shirts, pants, jackets, and other clothing in the collection should not be hung on a hanger. Although there are storage cabinets and archival grade hangers available to store garments in this way, in the long run it is better for these objects to be stored flat with tissue paper inside. Hanging causes stress on the fibers and results in stretching. These can be stored in drawers in cabinets. These types of objects will probably be too thick to fit in flat files.

Examples of textiles in this collection: clothing (t-shirts, Boy Scout uniform, police uniform), flags, case for seal, hats (baseball caps, Girl Scout beret), Mola cloth (a traditional Panamanian textile), handmade rug, scarves, bandanas, varsity letter,

## *Metals*

Metal objects should be stored below 40% relative humidity. Sterling silver objects need to be stored in anti-tarnish tissue or cloth and placed in an airtight sealed container. The size of the metal objects in the collection varies, but most should fit either in artifact boxes or directly on lined shelves.

Small metal objects such as jewelry, pins and medals, and coins should be stored according to the section on very small objects in this chapter. Coins can be stored in coin holders and then placed in small boxes. Archival coin holders are available from University Products: The Archival Company (image on left), Intercept Preservation Products (center image), and The Coin Supply Store (image on right).



Figure 28



Figure 29



Figure 30

The coin holders on the far left, made with archival cardboard and Mylar, are a good option for a few reasons: they are relatively inexpensive and allow for handling the coins easily without actually touching the metal surface of the coin. This also makes numbering the coins easy because they can be labeled on the cardboard rather than the coin, which would be quite difficult. They are only readily available in standard United States coin sizes, but these could easily be fabricated to fit any size coin using archival cardboard and Mylar.

Larger objects can be stored directly on lined shelves as long as they are not silver. These will need to be placed in airtight containers. One such object is a dish cover. This should be kept in an airtight container that is lined with anti-tarnish tissue or cloth. Storing in an airtight container will help prevent corrosion.



Figure 31



Figure 32

There is a metal sword in the collection. This can be stored directly on a shelf. It would be best to have a foam pad made specifically for this object. The blade could be sharp and someone handling it could cut himself or herself by accident. Plastazote or ethafoam can be used for this. Both are available from Gaylord and Hollinger Metal Edge.



Figure 33

Examples of metal objects in the collection: sword, small pins and medals, seal maker, medallions, jewelry (necklace with pendant, class ring), silver dish cover, brass box, metal plates, pocket knife, coins, bells, police badges, plaques, dog tags, railroad spike.

### *Paper*

An extensive part of this collection is made up of paper objects. The library already has protocol for storing books and other important paper documents. This collection should be handled in the same way that other collections in the library are stored. This includes books, yearbooks, and government documents.

Photographs should not be stored above 60% relative humidity. 30-35% relative humidity is ideal. This is a similar relative humidity to metal objects, so these types of objects could be stored in the same room. Right now, many photographs are stored piled in boxes like this:



Figure 34

Photographs should not be stored one on top of another. Each photograph should be separated and have its own enclosure. It is widely debated among conservators, registrars, and archivists as to the best enclosure in which to store photographs. Paper enclosures are an alternative to polyester enclosures. Paper enclosures are opaque so photographs have to be removed for someone to view them. If paper enclosures are used, they should be lignin-free, non-buffered (pH neutral), and not highly colored. If possible, the supplier of paper enclosures should be contacted to see if the enclosures have passed the Photographic Activity Test. This test detects image fading that results from harmful

chemicals in enclosures and detects staining reactions between enclosures and gelatin. The sleeves below come in a variety of sizes and are available from Light Impressions.



Figure 35

Envelopes that open from the side are also a viable option and are available in a variety of sizes. The ones below are from Hollinger Metal Edge.



Figure 36

The National Park Service recommends storing photographs in polyester enclosures made of DuPont Mylar D. The library has an ultrasonic encapsulator that can be used to make Mylar sleeves for the photographs. Polyester enclosures will protect a photograph from dusts, pests, and other agents of deterioration in the atmosphere, but there is a possibility of condensation getting inside the enclosure and damaging the photograph if the temperature and relative humidity are not kept at stable temperature and relative humidity. Although someone viewing the photograph is able to see the image without removing it from the enclosure (which could cause damage by scratching the emulsion or creasing the edges), polyester enclosures do not protect photographs from light exposure. If the storage area is not strictly climate controlled, the better option is to use acid-free paper or folders.

Once encapsulated or put into folders, photographs can then be stored in archival boxes. If photographs (or other objects) are irregular sizes, Gaylord will custom make boxes to fit particular objects. Here is a link to their custom boxes page:

<http://www.gaylord.com/listing.asp?H=3&PCI=128272>.

This document storage case from Hollinger Metal Edge is also a good option for storing photographs.



Figure 37

Another option for storing photographs is cold storage. Cold storage requires a dedicated space that is not accessed very often. Temperature is kept at 35-40°F. Temperature cannot vary more than 2°F and more than 3% relative humidity. Photographs, negatives, film, and transparencies in cold storage must be stored in archival folders within archival board boxes within Ziplock bags. Objects can only be retrieved from cold storage in emergencies. This option would be best if all the photographs were being digitized. Although cold storage is not the best storage option for this collection, if the library makes an initiative to store all of their photographic collection in cold storage, the PCM collection could be included. The National Park Service has a few documents that can help with implementing cold storage:

National Park Service, "Caring For Photographs: General Guidelines," *Conserve O Gram*, June 1997, Number 14/4,  
<http://www.nps.gov/history/museum/publications/conservoogram/14-04.pdf>.

National Park Service, "Cold Storage for Photograph Collections-An Overview," *Conserve O Gram*, August 2009, Number 14/10,  
<http://www.nps.gov/history/museum/publications/conservoogram/14-10.pdf>.

Other types of paper objects in the collection include maps, brochures, newspapers, programs, diplomas and certificates, and gift bags. These objects should be stored in flat files with acid-free storage materials (such as interleaving paper) between them. Paper objects are especially light sensitive so they should be kept in the dark when not being studied or exhibited.

Many paper objects (including photographs) in this collection are mounted on cardboard or foam core. Cardboard and foam core are extremely acidic. Leaving objects adhered to these supports will result in more rapid deterioration. A conservator should remove these backings.

Examples of paper objects in this collection: maps, photographs, books, certificates, diplomas, yearbooks, brochures, stickers, newspapers, newsletters, stamps, church

programs, small cardboard jewelry box from Misteli (The Jeweler Panama), gift bag (with Mola design), raised map of the Panama Canal Zone, milk cartons, unflattened juice containers.

### *Paintings*

There is a small group of paintings in this collection. Paintings should be stored at a relative humidity of 45-50% so they can be stored in the same room with textiles and ceramics.

Paintings can be stored in metal bins, shelves, or on sliding racks. If space allows, metal sliding racks are the best option because it allows paintings to be stored in their natural, hanging upright position and makes access easy. Although the unit takes up space, it will actually save storage space. Storage furniture can be purchased from a number of vendors, but this unit available from Gaylord is very compact.



Figure 38

Unfortunately, these screens are somewhat expensive. This particular unit is upwards of \$10,000. Fortunately, the National Park Service published a *Conserve O Gram* on constructing a painting screen from readily available materials. That *Conserve O Gram* can be accessed here: <http://www.cr.nps.gov/museum/publications/conservoogram/12-01.pdf>. Another great way to find expensive screens (and other types of object storage cabinets) for less money are to join museum listservs such as the RC-AAM (Registrar's Committee of American Association of Museums) because frequently museums are looking to sell some of their cabinets for cheaper or even giving them away for free if you are willing to pick them up or pay the shipping and they advertise on these listservs. Since there are not a lot of paintings in the collection, they can be hung on the wall as long as there is enough space for someone in storage to maneuver around them without risking bumping into them. Metal screening can be ordered from several suppliers including Hebei Yongwei Metal Products Co., Ltd. This can be cut to fit a wall. One of the best options for hanging paintings is to install D rings on the back. Metal hooks can then be hooked through the screen and D ring in order to create a table support for storage.

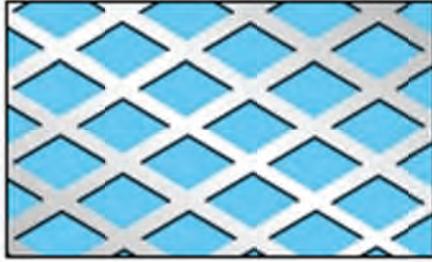


Figure 39



Figure 40

Paintings stored hung on racks for long periods of time should be covered to protect them from dust. Slip covers can be made from Tyvek, as is shown in figure 41 below. It is recommended to attach a photograph and/or identifying information such as accession number, artist, and title, on the outside of the slip cover. This keeps staff from having to remove the slip cover in order to identify an object.



Figure 41

Paintings can also be stored in bins that are kept off the ground at least six inches. Bins should not be made of flimsy materials or wood. Paintings should be stored face-to-face, back-to-back.

### *Wood*

Wood objects should be stored at 50-55% relative humidity. They can be stored in the same room with paintings, textiles, and ceramics. Wood objects should be stored in archival boxes or on lined shelves. Wood objects are susceptible to damage from dust, so it is important that dust covers are used where wood objects are stored.

Examples of wood objects in this collection: swagger stick.

### *Plastic*

Plastic objects should be stored at 50% relative humidity, so they can be stored in the same room with textiles, paintings, ceramics, and wood. Degradation of plastics is complicated because it depends on its specific chemical composition, which can vary significantly among objects. If concern about a specific object arises, a conservator who specializes in plastics should be consulted.

Plastic objects should be stored in archival artifact boxes or on lined shelves. Hard hats should be supported from the inside with archival foam cut to fit inside or tightly packed acid-free tissue paper.

Examples of plastic objects in this collection: hard hats.

### *Leather*

Organic materials such as leather, fur, and hide should be stored at 45-55% relative humidity. Unlike the other objects in the collection, these materials need moderate light. They should be stored separate from the other objects for this reason. Most of the leather objects in the collection are book covers. These can be stored away from the rest of the collection with the other books from this collection.

Examples of leather objects in this collection: book covers.

### *Other*

Other types of materials may be found as the collection continues to be processed and transferred to the library from the Panama Canal Museum. Following the general guidelines provided in this chapter should result in good storage conditions. If an object of unusual materials arrives, the *New Museum Registration Methods* book published by the American Association of Museums can be consulted. Other good resources are the National Park Service *Conserve O Grams* and National Park Service Museum Handbook. Both are accessible online.

*Conserve O Grams:*

[http://www.nps.gov/history/museum/publications/consveogram/cons\\_toc.html](http://www.nps.gov/history/museum/publications/consveogram/cons_toc.html)

Museum Handbook:

<http://www.cr.nps.gov/museum/publications/handbook.html>

All shelves, drawers, cabinets, screens, and anything else that objects are stored in or on should be labeled with the location that it will be identified by in the database. For example, if an object is stored in the first storage room, in the first cabinet, on the 2<sup>nd</sup> shelf, the door to the storage room should be labeled “Panama Canal Museum Collection Storage Room 1,” the cabinet should be labeled “Cabinet 1,” and the shelf inside the cabinet should be labeled “Shelf 2.” It will be very difficult and time consuming to locate and inventory objects if the actual locations they are stored in are not labeled.

## Chapter Six: Access

Only library staff should have access to the storage areas for the PCM Collection. This will help prevent damage to and theft of objects. Library staff will be more familiar with object locations in the storage area, so it will also save time and prevent unnecessary moving of other objects. Those who want to view objects for study should put in a written request. A staff member can then retrieve the object(s) from the storage area. The library already has a retrieval request form that can also be used for object study requests for this collection. Another example of a sample form can be found at the end of this chapter. People using the collections should be given a set of instructions (sample on the following page) on proper handling procedures and rules regarding the collection.

The research and study area should be located in a space separate from the storage area. Ideally, the research and study area should be located close to the storage area so the objects don't have to be moved far. However, the Special Collections Research Room on the second floor of Smathers Library East is also a good option since access is controlled. Objects should only be made available for study when someone is able to supervise. This is another reason why the Special Collections Research Room is an ideal location for this collection to be used because there is always a staff member supervising the room.

Storage areas should be locked when not being accessed. A key card entry system is used throughout the library and should also be used here. This will monitor who enters the storage area. A paper log should also be kept next to door of the storage area so staff members can sign guests in and out. Guests should only enter the storage area when accompanied by a staff member. Guests should not handle or move objects while in the storage area. When a staff member removes an object from the storage area, it should be recorded. Likewise, when an object is returned to the storage area, that information should be recorded and the object should be checked for damage (see chapter on condition reporting).

Storage areas should be kept clean, but library staff may prefer to clean these areas themselves rather than delegating the duties to janitorial staff. Janitorial staff is less likely to be aware of procedures for cleaning around cultural objects than those who study and organize those objects. Cleaning of objects should always fall under the responsibility of library staff or a conservator.



## George A. Smathers Libraries

### **Instructions for Use of the Panama Canal Museum Collection**

1. Objects study requests must be made in writing at the Special Collections Research Room on the second floor of Smathers Library East. Please allow 24 hours for objects to be retrieved. An appointment must be made to return and use the objects.
2. Objects may not be removed from the Special Collections Research Room. The Research Room is open Monday through Thursday from 9:00 am until 6:00 pm and Friday 9:00 am until 5:00 pm.
3. You will need to sign in upon arrival to and departure from the Special Collections Research Room.
4. Purses, backpacks, and oversized bags must be stored in the lockers located along the north wall of the Special Collections Research Room.
5. Objects should be handled with care. Two hands should always be used when moving an object and gloves should be worn (provided by the library). Only one object should be picked up at a time. Please ask for assistance from library staff when moving large, heavy, or fragile objects.
6. Writing utensils should be limited to pencils only (no pens).
7. With permission, photographs may be taken.
8. Inform a library staff member immediately if you notice any damage to objects or if a tag becomes detached from an object.

**Panama Canal Museum Collection Object Study Request**

Name _____	Date _____
Institution affiliation _____	UFID _____
Department _____	

Collection: <u>Panama Canal Museum Collection</u>	
Object number _____	Object type _____
Approximate size _____	
Object description _____	
<b>For official use only</b>	
Object location _____	
Request received by _____	Date _____
Retrieved by _____	Date _____
Object returned _____	Date _____
Notes _____	

Collection: <u>Panama Canal Museum Collection</u>	
Object number _____	Object type _____
Approximate size _____	
Object description _____	
<b>For official use only</b>	
Object location _____	
Request received by _____	Date _____
Retrieved by _____	Date _____
Object returned _____	Date _____
Notes _____	

I acknowledge that I have read and understand the handling instructions for using the Panama Canal Museum Collection. By signing below I agree to abide by all rules set forth by the Smathers Library.

Student signature \_\_\_\_\_ Date \_\_\_\_\_

## Chapter Seven: Exhibition

In addition to being used for study in the research room, the Panama Canal Museum Collection may also be exhibited. There is a space on the second floor of Library East that is used for temporary exhibitions and the Library of Congress has expressed interest in curating an exhibition in collaboration with the University of Florida Smathers Library using the objects in this collection. Additionally, if the collection is available to view online, other museums and libraries may come across objects they would like to borrow when planning their own exhibitions and request to borrow them temporarily. This chapter is broken into three sections; the first section focuses on general information such as safe ways to display different types of objects in the Panama Canal Museum Collection, the second section focuses on producing exhibitions in house, and the last section focuses on the logistics of loaning objects to other institutions for exhibition. Objects are most vulnerable when they are being handled and on exhibition so it is important to always follow proper procedures when handling and moving objects, which are outlined in previous chapters.

### *General*

When objects going on exhibition (as well as to the research and study room), the space they have been stored in should continue to be reserved for that object. It can be tempting to use “open” space, but if the space is not kept for the objects on exhibition, finding space for them when they are returned to storage may be difficult. Putting a photograph of the object labeled with the object’s accession number in its storage location can serve as a placeholder and a reminder to not put anything else in that space. Returning an object to the same place it was removed from will also keep location records straight. When an object is moved to an exhibition space or sent out on loan, the temporary location should be recorded. However, the location history should always be retained so its storage location can easily be looked up. Storing an object in the same place will minimize confusion and insure that it is placed in an area that has been designed to preserve that specific type of material.

Since exhibitions will most likely feature objects made of different materials, a compromise needs to be struck as far as temperature and relative humidity are concerned in the exhibition space. A temperature in the range of 68°-72° F (20°-22° C) with a constant relative humidity between 45-55% is recommended. Hygrothermographs made for exhibition spaces can be purchased from a variety of vendors, at different costs, and with different length chart rotations. The best option is to purchase a long-cycle hygrothermograph, which allows you to record up to three months of relative humidity and temperature without changing the chart paper roll. This one is available from Oakton Instruments and costs just under \$1,200 and chart replacement rolls can be purchased in one and three month rotations for \$25. It would be ideal to have one of these models in each of the storage areas for the collection.



Figure 42

There are less expensive hygrothermographs available, but their chart paper rolls will have to be changed more often because they only record one week at a time. Someone will have to remember to change the roll every week and to make sure there are replacement rolls on hand. Oakton Instruments has an economical model available for just under \$350, with replacement rolls costing \$21.50 for a pack of 55.



Figure 43

The library's exhibits generally last a month, so with the economical model the chart would need to be replaced at least 4 or 5 times. Regardless of which model of hygrothermograph the library uses, the important part is to remember to check it at least once a week to be sure the temperature and relative humidity are at the proper levels.

Since the library usually displays their objects in secured vitrines microclimates are created, which also need to be monitored. There are thermohygrometers designed to measure temperature and relative humidity in display cases. There should be one in every case. These can be purchased from University Products for \$80 each plus a \$30 calibration kit.

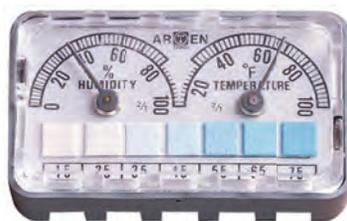


Figure 44

If the library only displays objects in secured vitrines, an expensive hygrothermograph isn't absolutely necessary in the exhibition space. However, the temperature and relative humidity should still be monitored. A radio-controlled thermo-hygrometer is available from University Products that monitors temperature and relative humidity using sensors and a base station. Sensors work up to 90 feet from the base station and transmit information every thirty seconds.



Figure 45

Keep in mind that most hygrothermographs and thermohygrometers operate by batteries, so remember to check that the batteries have not gone bad and always keep spare batteries on hand. Most monitoring devices operate on standard sized batteries.

Silica gel packs can help maintain stable humidity in microclimates. These packs work by acting as a buffer against relative humidity changes. Rhapid Pak, available from University Products, was developed specially for museum displays. Rhapid Pak units are available dry or at 30%, 40%, 50% or 60% relative humidity and one Rhapid Pak will condition 2 to 4 cubic feet of display case volume.



Figure 46

Since many of the objects in the PCM Collection are paper or textiles, light intensity is also an issue. Light meters can measure the amount of light (in footcandles and lux) hitting a specific place. The most light sensitive works in the PCM Collection are photographs, paper documents, and textiles. Light levels should not exceed 50 lux or 5 footcandles when on display.



Figure 47

Just like when in storage, objects need to be properly supported while on exhibition. This may range from using plastic picture frames to hold up paper documents to building custom mounts for hats or mannequins for clothing. The best and cheapest mounts will be the ones that are built in house, specifically to fit each object. They can be very minimalist and as long as they don't detract from the object, the same mounts can be used in storage and on exhibition. Mounts should be built to support an object in its natural or intended position and be made of archival quality and chemically stable materials. If wood is used, it should be a wood that does not off gas.

#### *In house exhibitions*

The library's in house exhibitions are held in the gallery on the second floor of Smathers Library East. Exhibitions typically last a month and are organized by different departments in the library. For this reason, none of the objects in the PCM Collection will probably be in danger of being overexposed in this space. However, the space does not have a guard, so the vitrines should be secured. Additionally, the lights are fluorescent. If possible, the light covers should have UV filtered and it never hurts to add a UV filtering film on the vitrines. Many of the other collections in the library that go on display in this gallery would also benefit from these small changes.

It is important that an exhibition have a completed layout before objects are brought in for installation. Knowing a head of time where objects are going to be placed will prevent unnecessary handling and movement.

#### *Exhibitions at other institutions*

Other libraries or museums may request to borrow objects in the PCM collection for their own exhibitions. A lot of work goes into loaning objects, but it is a great opportunity for others to see objects that they may not otherwise get to see, and makes others aware of the wonderful collections at the University of Florida's Smathers Library.

The first thing to do regarding lending objects is to determine who will decide if requested objects can travel. This decision should be made by the person in charge of the collection who can determine if the object is needed at the library during the requested period in consultation with the conservator who can evaluate if the object is in good enough condition to travel. The person (or people) who decides whether or not to lend

objects should ask that potential borrowers make their request in writing. This can be done through a paper form or online form. Information to be included with the request includes reason for borrowing, dates of the loan, what object(s) is requested, and a facility report of the borrowing institution. Facility reports include important information about the institution such as security, environmental conditions, insurance, staff, and a floor plan and/or images of the space. Facility reports will help the library decide if an institution can ensure that an object will not be damaged or stolen while on loan. If there are still doubts after reading a facility report, the library can stipulate specific measures be taken (such as locked vitrines or a guard in the space). If an institution requests an object for study rather than to put on exhibition, the library can decide who should be allowed to handle that object and should make that clear to the borrowing institution.

Once the library has agreed to lend an object, they should fill out a loan agreement, which spells out all the terms of the loan. This should include information such as the borrower, the lender, dates of loan and reason for loan (study or exhibition), the library's requirements for security, light levels, display, insurance, credit line, staff, shipping arrangements, care and handling, photographs and reproductions, costs, and any other specific requirements the library believes are necessary. It is usually understood that a borrower will pay for all costs incurred from lending an object, including framing and any necessary conservation work. However, the borrower should be informed of this up front and it should be repeated in the loan agreement. A sample loan agreement that the library can use or amend can be found at the end of this section.

Moving an object from storage to an exhibition space in the same building is quite different than moving an object from city to another. Objects will have to be packed securely and travel by truck or van. There are several companies that specialize in shipping art and historic artifacts, but their services can be expensive, especially if you are only shipping a few very small things. FedEx offers an affordable alternate, which some museums use for smaller or lesser value objects. FedEx Custom Critical vans are temperature controlled and are never left unattended. One drawback that prevents many museums from using this service is that there is no room for a courier. However, couriers are only really necessary if an object has a high value or is especially delicate. It is unlikely that the library will send any couriers with these objects, with the possible exception of a few objects such as the Pre Columbian pottery, which is very fragile. Make sure all vehicles are air ride equipped when transporting objects.

It is also possible to retrofit one of the library's vans or trucks to transport objects. This would also work with a rental truck or van, although less will need to be done if one can be procured that is already air ride equipped. The National Park Service published a Conserve O Gram on the topic of retrofitting a moving van for transporting museum objects, and is available online.

Individual objects will need to be packed. The specific method for each object will depend on the size, material, and fragility of the object. Some less fragile objects may be able to be wrapped in blankets or bubble wrap (bubble side always facing away from the object) and placed in a box with handles. The box should be padded with additional

bubble wrap or blankets to make sure the object cannot move within the box. Custom boxes can be built to fit specific objects using foam and archival padding materials such as in the images below. The library may also choose to purchase several plastic crates. These can be refitted using foam so that they can be reused for different objects. Paper objects (including books) can be shipped in Solander boxes. These can be purchased from most library and archival supply companies. If these shipping materials are being purchased specifically for a loan, the library should ask the borrowing institution to pay for any costs related to shipping.

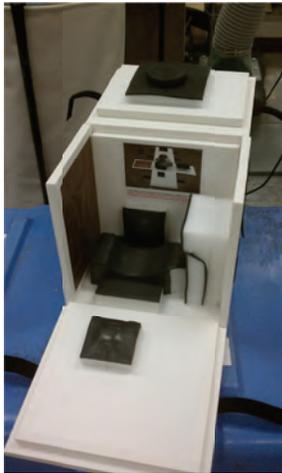


Figure 48



Figure 49

All objects should be conditioned reported and photographed prior to being packed. The library should keep a copy of the condition report and send a copy of the condition report to the borrowing institution for them to complete upon unpacking. Condition reports should be kept in a binder along with other important information that the borrower needs to know such as library staff contact information, packing and unpacking instructions (including pictures), a copy of the loan agreement, and any other important information the library thinks the borrower may need to know.

The library does not have a covered loading dock, so a plan needs to be made in case objects need to be loaded while it is raining. Objects should be wrapped in bags or plastic and then sealed using tape. This can be done within an object's shipping box or crate, around the outside of the shipping box or crate, or both. When using tape for sealing openings, fold the end of the tape over to create a tab. This will make unpacking easier. Be sure to include instructions and pictures for complicated shipments. The clearer and easier it is to pack and unpack an object, the less risk there is that the object will be damaged during packing and unpacking. The last thing the library wants is someone who is frustrated unpacking its objects.

Even when being as careful as possible accidents do happen, so make sure that the borrowing institution has contact information where someone at the library who works with the PCM collection can be reached in case of emergency, even after hours. Insurance will cover most incidents, but be sure to include in the loan agreement whose insurance will cover the object while in transit and on exhibition.

**Sample loan approval letter (based on the loan approval letter use by the Philadelphia Museum of Art)**

Date

Addressee

Dear,

We are pleased to inform you that the following object(s) has been approved for loan to the [institution name] for the purpose of [exhibition, study, etc...] from [beginning date] to [end date].

Object number	Object title or description
	Artist or creator
	Year
	Material

Your institution will be responsible for all costs involved in the loan, including packing and labor, transportation, insurance, loan fee, conservation, courier expenses (if necessary), and any other related expenses. The mailing address and to whom the invoices should be sent needs to be provided before shipping.

The objects must be displayed in secure vitrines that are weighted or attached to the floor or wall. Light levels on paper or textile objects must not exceed five footcandles of incandescent light.. All light sources must be filtered to eliminate ultraviolet component. Temperature should be maintained at 68 to 72° Fahrenheit and relative humidity at 50% ± 5%.

The library will accept “nail-to-nail” private coverage offered by the borrower. A certificate of insurance should be sent in advance of the shipment.

Or

The library will maintain our fine arts insurance and you will be charged the premium of around \_\_\_\_\_. A certificate of insurance is enclosed for your files.

Enclosed you will find two copies of our Loan Agreements, please sign and return both copies to my attention at your earliest convenience. The loan agreements will be countersigned and an original copy will be returned to you shortly. If you have any questions, please feel free to contact me.

Sincerely,

[sign]

**Sample Loan Agreement (based on the loan agreement used by the Philadelphia Museum of Art)**

**LOAN AGREEMENT**

This Loan Agreement is between the **University of Florida Smathers Library** and the institution (the "**Borrower**") named below.

Intending to be legally bound, the Borrower and the Library agree that the attached **Terms and Conditions** apply to the loan by the Library (the "**Loan**") of the object(s) listed below (the "**Objects**"), which the Borrower has requested identified below.

This Agreement has been signed by each of the parties as of the respective date(s) set forth below.

**Borrower:**

Signature:

---

Print Name & Title:

---

Address:

---

---

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

**University of Florida Smathers Library**

Signature:

---

Print Name & Title:

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

**REASON FOR LOAN:**

**PUBLIC VIEWING DATES of EXHIBITION OR STUDY DATES:**

**Begin Date            End Date**

## OBJECTS

Object ID #  
Artist/Maker  
Title or Description  
Date  
Media  
Credit Line:  
Value \$

### Terms and Conditions of Loan Agreement

**1. Loan.** The Borrower agrees to comply with each of the terms and conditions of this Agreement, including those set forth on the **Exhibit A** (“General Conditions”) and **Exhibit B** (“Special Conditions”), attached to this Agreement. Subject to such terms and conditions, the Library agrees to loan to the Borrower the Objects for the period of the Exhibition or for Study. Unless otherwise instructed by the Library, at the end of such period the Borrower will return the Objects to the Library at the address specified in Section 13. The Library reserves the right to terminate the Loan if any of the representations of the Borrower are untrue or the Borrower fails to comply with any terms or conditions of this Agreement.

**2. Facilities, Etc.** The Borrower represents and warrants to the Library: (a) the facilities report submitted by the Borrower to the Library in connection with the Loan is complete and accurate in all material respects and no material adverse change in the Borrower’s facilities has occurred since the date of preparation of the facilities report, (b) the Borrower is not undergoing any material renovations and none are planned for the period that the Loan is in effect at the Borrower’s venue, and (c) the Borrower is borrowing the Objects for the purpose of exhibiting or studying the Objects during the period set forth at the beginning of this Agreement.

**3. Insurance.**

3.1. The Library will insure the Object(s) under its policy against all risk of physical loss or damage from any external cause while in transit and on location during the period of the Loan (“wall to wall”). The Library hereby confirms that its policy waives subrogation by the insurance company against the Borrower and other exhibiting institutions. The Borrower may maintain equivalent insurance only if approved below in writing by the Library. In such event, before the Loan is shipped or released to the Borrower, the Borrower must deliver to the Library a Certificate of Insurance or Indemnity, from a carrier satisfactory to the Library, naming the Library as an “additional insured” (and a copy of the policy if so requested), and confirming coverage for the value(s) of the Object(s) as specified by the Library. The Borrower agrees not to disclose such values to any third party except as may be necessary to obtain such insurance.

\_\_\_\_\_ **Insurance coverage will be accepted from the Borrower.**

\_\_\_\_\_ **Insurance coverage will be maintained by the Library.**

**4. Credit Line.** Whenever an Object is on exhibition, the Borrower will at all times display a descriptive label with such information as is furnished by the Library, together with a credit line in the form specified in the Object information provided.

**5. Security and Other Protection from Harm.** The Borrower will take all action necessary to protect the Object(s) from harm, including harm from the hazards of fire, theft, exposure to extreme or deteriorating light, extremes of temperature and relative humidity, insects, dirt, or handling by unauthorized or inexperienced persons or the public.

**6. Staff.**

6.1 The Objects may only be handled by packers and staff specially trained.

**7. Shipping.**

7.1. All shipping arrangements will be made by the Borrower with approval by the Library. The Library will pack the works for outgoing loan and the Borrower will be charged for all labor and materials.

7.2 All ground transportation must be via air-ride, climate-controlled service.

7.3 The Borrower will keep Library crates and packing materials for return shipment, and Objects will be repacked using the same protective methods and materials. Packing crates will be stored in appropriate environmental conditions.

7.4 Each condition report accompanying the Loan will be annotated and signed upon receipt of the Loan and upon repacking for outgoing shipment by a qualified representative of the Borrower and by a Library representative if one is present.

**8. Care and Handling.**

8.1. The Borrower will exercise the highest degree of professional care in handling each Object in its possession or control. No Object may be altered or changed in any manner whatsoever. Without limiting the foregoing, no Object may be unframed, unglazed or removed from mats, mounts, vitrines, or bases without the prior written consent of the Library. Unless it is necessary in an emergency situation to protect an Object from further damage, no Object may be cleaned, repaired, retouched or altered in any way without the prior written consent of the Library.

8.2. In the event of an emergency, the Borrower will take all steps prudent and necessary to halt or minimize damage to the Object(s). Should any loss or breakage occur, or any deterioration be observed, the Borrower must notify the Library immediately, first by phone and then in written detail with photographs if possible.

8.3. Objects will remain in the possession of the Borrower for the Loan period specified above, plus a reasonable time for receiving and returning the Objects. Any extension of time past the final end date shown above must be applied for in writing within a reasonable time before the end of the Loan period.

8.4. When the Loan is returned to the Library, the Borrower is responsible for packing and shipping it in exactly the same manner as received, using the same cases,

packages, padding and other furnishings, unless the Library specifically authorizes a change.

**9. Photography and Reproduction.**

9.1. The Borrower may make slides for use by the Borrower or for loan to educational institutions. The Borrower may lend photographs of objects to schools, college, or other education institutions for study. Permission for other photography may be requested, in writing, from the Library. No such photograph, slide or reproduction may be offered at unrestricted sale. Any photographs or slides lent for purposes stated above must be marked, "Courtesy of the University of Florida Smathers Library."

9.2 Photography is permitted for purposes of recording the condition of the Objects and installation views of exhibitions are permitted for record and publicity purposes.

**10. Catalogue, Etc.** The Borrower agrees to provide to the Library   2   complimentary copies of each book, catalogue and other publication published with respect to an Exhibition.

**11. Multiple Venues.** If any Object will be exhibited or studied at any venues in addition to the Borrower's own venue, the Borrower will be responsible for causing the other institutions to comply with the terms and conditions of this Agreement. All shipments between venues must be approved in advance by the Library.

**12. Loan Costs.** The Borrower will bear all expenses of the Loan, including without limit, shipping, packing, handling, courier expenses, if necessary, and insurance premiums. If the Borrower cancels the Loan, any expenses incurred to the date of cancellation and any expenses that the Library cannot avoid will be the responsibility of the Borrower. The Library will prepare invoices for all expenses for which the Borrower is responsible. All invoices are due within 30 days of receipt. A loan fee of \$25 per object will be charged or \$50 per object when the loan request arrives less than 4 months before shipment.

**13. Location to which the Object(s) must be returned, unless otherwise notified in writing:**

University of Florida Smathers Library  
[Insert shipping address here]

**14. Miscellaneous.** This Agreement may not be amended except in writing

**Exhibit A  
GENERAL CONDITIONS GOVERNING LOANS**

**1. Security**

1.1. All exterior openings not used for public entrance, including accessible windows, roof doors, and air ducts, will be secured by alarm at all times. Alarms will be monitored at a central control station within the Borrower's building, at a local police department, or at a reputable alarm company 24 hours per day. There will be written alarm response procedures that employees are trained to follow, and a designated official of the Borrower will be available at all times to respond to emergency situations.

1.2. Storage areas where the Objects are located will be locked with alarms on windows, doors, and any other openings. Access to these storage areas will be restricted.

1.3. Institution personnel will check exhibition galleries or study areas where the Objects are located on an established basis of frequency. Exterior checks of the building are desirable but not mandatory when a 24-hour guard is posted in the building. If a 24-hour guard is not posted in the building, local police or private security personnel will perform exterior checks of the premises on a periodic basis during hours of closing. Access to the facility will be controlled during hours of closing.

1.4. Records will be maintained on all movement of the Objects, including internal relocations, and only the Borrower's staff may sign for the removal of objects.

## **2. Fire Control.**

2.1. Exhibition buildings will be equipped with early-warning smoke detection and fire alarm equipment connected to and monitored 24 hours per day at an internal security monitoring system, a local fire department, or a reputable alarm company. There will be written alarm response procedures and a designated official available at all times to respond to emergency situations.

## **3. Relative Humidity and Temperature Controls**

3.1. There will be facilities for control of relative humidity and temperature in gallery, storage and packing areas where Library objects are located. All efforts should be made to keep relative humidity maintained at  $50\% \pm 5\%$  with no more than a 5% fluctuation within that range during a 24-hour period. Temperature should be maintained between 68°F and 72°F (19°C to 25°C).

## **4. Light Levels**

4.1. Natural, quartz, tungsten-halogen, and fluorescent light will be filtered for ultraviolet radiation.

4.2. Works of art on paper will be stored, exhibited, and studied only in incandescent light or other light that has been filtered to remove at least 97% of the ultraviolet radiation.

## **5. Display Conditions**

5.1. No Library object will be displayed in close proximity to sources of heat or cold air, or in cases of vitrines in which the internal temperature exceeds 77°F (25°C) or the relative humidity is out of the range specified by the Library.

5.2. No food or beverages will be present in areas where Library objects are located, nor will smoking be permitted in those areas.

5.3. The Library may require that its small objects be secured in locked cases that are fitted with alarms; and that some type of security mounting be used in the installation of framed objects when not monitored by guards.

**Exhibit B- Special Conditions**

Library or approved courier required.

Required per diem of \$[enter amount] a day for courier.

Display requirements: [enter special display requirements].

The Library reserves the right to update the object(s) value up to three months before the shipment date.

No changes can be made to packing or hanging hardware without Library permission.

The Library will/will not charge a loan fee.

## Chapter Eight: Inventory

There are many reasons to take inventory of objects in a collection. The most basic reason is to make sure the library knows where all of the objects in the PCM Collection are located. If you don't know where your objects are, how can you expect to care for them properly or let others use them for study or exhibitions? Other reasons to take inventory are to update location information, to identify objects that need conservation, to aid in security, to make sure all objects are numbered or tagged, and to help identify objects that should be deaccessioned or areas where the collection is lacking so more objects can be acquired.

Taking inventory involves checking the physical locations of objects to be sure the locations are properly recorded in the database. As the objects are brought into the library and catalogued, their locations should be recorded. This will be the first major inventory and should be a complete inventory of the entire collection.

While a complete inventory check is the most comprehensive, the library does not have the staff time to dedicate to constantly checking the locations of over 10,000 objects. Therefore, the library can perform section-by-section and spot check inventories. Section-by-section inventories are done by working through one area of the collection (such as high value objects, paper objects, metal objects, etc...) at a time. Section-by-section inventories should be done on a regular basis and rotate the area of concentration. Spot check inventories are very limited in scope, but can be a good indicator of how well the locations for objects are being recorded.

Organization and planning are imperative to making sure that any type of inventory is done quickly and efficiently. First, the storage area should be well organized with the doors, cabinets, screens, drawers, and shelves are all properly labeled. Second, you should decide the amount of time you have to dedicate to taking inventory. This will help determine how many people you will need. Inventory will be taken quicker if the person doing it is already familiar with the storage areas. Good candidates are librarians, collections managers, and graduate assistants working with the PCM collection. Third, you should compile your list of objects to be inventoried. The best way to do this is to generate a list from your catalogue that you can make notes on if the location is correct, if the object is located in a different place, or if the object cannot be found. Using the list, the person doing the inventory should update the locations in the catalogue. Even if the objects were in the place where they were listed in the catalogue, it should be noted in the catalogue that the location was correct when the inventory was taken on a specific date.

What is the best way to generate a list of objects to be inventoried? If you are conducting a section-by-section inventory, you should identify the section you wish to target. Then, using your object catalogue, you can generate a list of all objects in that section (such as paper objects, metal objects, paintings, etc...). Some programs will generate lists automatically for you and others will require you to manually pick out the objects. It is best to invest in software where the program will generate lists for you. Manually selecting 500-1000 objects could take as long as the actual inventory check. Make sure

your list contains information that will help you identify the object. The accession number will be the first indicator, but other information such as approximate size, color, materials, and a short physical description will help locate objects if the number has fallen off or faded or if the object is mislabeled. A small photograph is very helpful as well.

You can generate lists for spot check inventories in a variety of ways. One way is to have the computer randomly select between 50 and 100 objects from the catalogue. Another is to manually select between 50 and 100 objects from the catalogue. It is also a good idea to do this process in reverse; go into the storage areas (and exhibit areas, if applicable) and write down the locations of 50 to 100 random objects and then check the computer to be sure their locations are properly recorded.

Since this collection will mostly be used for individual study and not in exhibitions, an inventory of objects that have recently been studied should be taken periodically. Checking the location of the last 30-50 objects requested for study can accomplish this. Objects are most likely to disappear or be misplaced when they are being moved from one place to another. How often this type of inventory will need to be taken will depend on how much the collection gets used. If 30-50 objects are studied every week, then the inventory should be taken more often than if 30-50 objects are studied in a year. The idea is to make sure that each object that was moved was placed back in its proper storage location. While no inventory method can be as accurate and thorough as an entire inventory check or a section-by-section or spot check inventory, this method can be used. It is relatively quick and, if done frequently enough, can be effective in making sure objects that were moved have been put back in their proper storage place.

If an object is found in an improper place at any time during the inventory, it can be moved to its proper location. However, be sure another object has not been put in the proper object's location. All the guidelines for handling objects outlined in chapter two should be followed. If you are unsure of your ability to move the object (if it looks fragile or is too large or heavy), record its current location and make a note that it needs to be moved to its proper location so that it can be moved at a later time when a conservator is available to evaluate the condition or several staff members are available for heavy or awkward lifting.

Inventory can be time consuming, but it is a very important part of preservation and care. An organized and well-labeled storage area combined with well-trained individuals will help ensure that inventory goes quickly, efficiently, and smoothly.

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**Figure 49:** Customized shipping box created by art handlers at the Philadelphia Museum of Art. Photograph taken by Kim Tinnell.

## List of Archives Containing Materials Related to the Panama Canal Experience

Autoridad del Canal de Panama  
Barbados Museum and Historical Society  
Bibliotheque Nationale De Frances  
The Bridgeman Art Library  
Collection Sirot-Angel  
Corbis  
Darthmouth College Library  
Franklin D. Roosevelt Library and Museum  
Georgetown University Library  
Getty Images  
The Granger Collection, NY  
Theodore Roosevelt Collection, Harvard College Library  
Historical Medical Library of the College of Physicians of Philadelphia  
Library of Congress  
Linda Hall Library of Science, Engineering and Technology  
National Archives and Records  
National Library of Medicine  
Son of the South  
Thomas Jefferson University, Archives and Special Collections  
UCR California Museum of Photography  
University of Michigan, Special Collections Library  
Claude Moore Health Science Library  
University of Virginia  
Office of Medical History, US Army Medical Department  
US Military Academic Library  
Virginia Military Institute Institute  
Beinecke Rare Book and Manuscript Library, Yale University  
Penn Museum Film Archive

## Questions to Guide Data Analysis and Evaluation

Sophia Acord, Ph.D., January 23, 2011

- What are the benefits and liabilities associated with depositing a museum collection in a library?
- What are the benefits and liabilities associated with acquiring a museum collection for libraries?
- As museums face closure, how can museum leadership and board members access information about and assess the appropriateness of working with libraries?
- How can libraries assess risks and determine the best questions to ask prior to accepting or rejecting collections that are threatened by the current economy?
- What are methods libraries can implement to successfully integrate museum objects into their collection(s)?
- How can libraries successfully integrate a museum accompanied by an extant lay-expert group of elderly and geographically diverse volunteers?
- How can libraries ensure that the transition and integration process does not compromise the pride and sense of ownership held by former stewards and collectors?
- What strategies can be used both by the accessioning libraries and contributing museums to map and use extant resources of knowledge, skills, networks, funding opportunities, private collections, etc., for the benefit of the project and user community?
- What are funding, branding, and governance structures that enable and support sustainable integration and stewardship activities?
- What mistakes can occur during pre-merger, merger, and integration stages for both museums and libraries?
- What solutions are available to ensure accessioned collections resulting from mergers, can be most widely discoverable and accessed?
- How can both library and museum professionals initiate dialogs that raise awareness about needs for preserving collections and other threatened community and cultural assets?

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**Panama Canal Museum  
Quarterly Report  
October 21, 2011**

**Centennial Exhibit Planning**

Rachel Schipper and Lourdes Santamaria-Wheeler planned exhibits with the associate dean of the School of Business (World Trade) and the Harn Art Museum (Molas). Edith Crouch was contacted by Rachel and she will be doing a presentation at the Harn on Sunday, August 17, 2014 from 3-4 in the afternoon and have her books for sale at the Museum store. Edie has kindly estimated her costs; she will be reimbursed for her travel expenses but is not charging the University for the honor of preparing a presentation. In preparation for the exhibits in 2014, Lourdes Santamaria-Wheeler met with the Harn Museum of Art and Picture This! Frameshop. The Harn will host an exhibit of Molas during the fall of 2014. Susan Cooksey will be the curator. After meeting with the Harn Registrar it was determined that:

- The Harn would consider this an exhibit of items on loan; therefore their stock of available frames, hardware, and labels are available. If there are not enough frames available due to their use in another exhibit, there is a possibility of the Library providing/loaning frames
- The available frames are black metal of varying sizes
- Recommended framing methods for museum textiles was discussed

In case additional frames are necessary, price estimates for three frame sizes in the same material as existing Harn frames, were solicited from Picture This! Frameshop in Gainesville.

- 12x14 - \$50
- 14x16 - \$55
- 20x24 - \$80

Paul Losch and Rachel Schipper talked with Darcie MacMahon of the Florida Museum of Natural History about the August 2014 exhibit. The FMNH has wall cases that can be used for the 75 foot hallway exhibit in the Museum, so costs of fabrication of the exhibit will be minimal. Bruce McFadden will have an exhibit during this time of the artifacts found at the excavation site <32 complement the hallway exhibit.

Rachel has planned the “Gator Nation Celebrates Panama” weekend package for August 15-17, 2014. The cost of attending the Symphony of the Americas (Friday, August 15), a keynote event on August 16 (hopefully with David McCullough), and the Mola exhibit/Edie Crouch event on August 17 will be approximately \$320 (accommodations at the Hilton Gainesville). A block of 100 rooms has been reserved at the Hilton for the weekend (Friday/Saturday night stay). A second block of 16 rooms has been reserved for the symphony. Total costs for the symphony are estimated at about \$24,000. It is estimated that approximately half of the costs may be recouped by ticket sales if half the auditorium is filled (800 seats). Rachel visited with maestro Brooks-Bruzzese, Vice President and Executive Director, Renee LaBonte, and Sandy Riblett, Director of Operations on October 9, 2011 in Fort Lauderdale for a planning session. The symphony has agreed for partial sales of CDs to be donated to UF, and they have listed for Rachel a number of potential sponsors/donors to contact. When asked who should introduce the symphony, maestro Brooks-Bruzzese suggested he contact several prominent friends, including Soledad O’Brien. Rachel asked if the maestro would entertain having an oral history done—and posted on the UFDC site—and the maestro readily agreed to being interviewed. The group may work on getting a visa for a guest Kuna Indian pan flutist, to play indigenous music with the symphony that has never before been performed in the United States.

An IMLS grant has been proposed, and Rachel and Bess de Farber have begun work on it. Bess recommended the use of a consultant to ascertain expectations of the partners. Negotiations with Donovan Management, Inc. were finalized (**cost, \$10,500/UF provided**). Jim Donovan began a series of interviews on October 3, 2011, and these will continue for approximately one month. Interviewees include Joe Wood, Kathy Egolf, Paul “Buddy” Morgan, Tom Wilder, Mike Coffey, Sam Huang, Judy Russell, Rachel Schipper, Bess de Farber, Aims McGuinness and others. Donovan will be advising on philanthropic endeavors to support the collections. Rachel has spent many of her own hours as well as work hours on the narrative preparation for the grant and the compiling of budgetary information (**approximately \$5,000/UF provided**). Sam Huang and Bess will continue the work on the grant, and Judy Russell will be the PI.

Rachel Schipper wrote a peer-reviewed article, [http://www.flalib.org/fl\\_lib\\_journal/Fall2011.pdf](http://www.flalib.org/fl_lib_journal/Fall2011.pdf), detailing the PCM/UF collaboration in the Florida Libraries Journal. A follow-up presentation with Chelsea Dinsmore is also planned during the Florida Libraries Association meeting in Orlando in April.

### **Web Site Enhancements**

From the University of Florida Smathers Library web site, <http://www.uflib.ufl.edu/>, click on “Giving to the Libraries” in the left-side menu. This results in the following link: <http://www.uflib.ufl.edu/giving/> and clicking on “Giving Opportunities” in the left-hand menu will bring you to [http://www.uflib.ufl.edu/giving/giv\\_ops.html](http://www.uflib.ufl.edu/giving/giv_ops.html). At the bottom of the page, there is a paragraph about the PCM collections, and there is a link to the Past, Present, Future brochure (in blue print).

## **Latin American Collection**

Paul Losch traveled to Panama in July and visited several potential museum partners including the West Indies Museum. Paul spent time in meetings, reference work, and correspondence (including e-mail correspondence with PCM board members about donations, exhibits, etc.) For example, Paul was involved in exhibit planning with Lourdes Santamaria Wheeler and Rachel Schipper. Other time was spent as Paul supervised his students in processing the collection and providing reference assistance.

70 student hours x \$7.31/hr=\$511.70 Herrera  
35 student hours x \$7.31/hr=\$255.81 Gesualdi  
Student total=\$767.51

106 hours x \$27.54/hr =\$2918.96 Losch

**UF Provided:**  
**Wages=\$3686.47**

**UF provided:**  
**Travel Expenses= \$539.00**

## **Gifts and Exchange**

For this past quarter Gifts personnel have coordinated two PCM efforts: the acquisition of a large donor gift, and a donor mailing. On August 1, 2011, Gifts met Kathy Egolf at UF and received 1164 Molas of various sizes (small, medium, and large), 51 Journals, 45 Hardbound Books (Yearbooks), 26 Items of Clothing (boleros, penitentiary shirts), 6 Items of Jewelry (necklaces, bracelets), and 2 Movie Reels. These items were inventoried and then delivered to John Freund in preservation. A letter of acknowledgement for this gift was mailed on August 5 to Kathy Egolf.

On August 22, 2011, eight letters were mailed to PCM donors whose items could potentially become part of the pre-Columbian materials preserved by the Florida Museum of Natural History. The letters included Deed of Gift forms to be completed and returned to Michelle ElNeil. They also included information regarding the 1972 UNESCO Convention on World Heritage and Natural Preservation as it may pertain to donated materials, and a request that the donors confirm that the items exited their country of origin before the 1972 Convention.

**UF Costs for Salary/Postage: \$65**

## **National Bagger Museum**

Rachel Schipper emailed the National Bagger Museum to request costs for transport of the Canal model. Ronald de Heer subsequently emailed several articles that publicized the Canal's dredging. Ronald continues to research the costs for container transport of the model.

## **Preservation Department, Conservation Unit**

John Freund continues to work on the PCM inventory and this month transferred Judy Lindsey's pre-Columbian collection to the Florida Museum of Natural History. He hosted a tour of the molas and pre-Columbian collection for Susan Cooksey (Harn curator) and a member of the UF Art and Art History faculty, Maya Stanfield-Mazzi.

### **Conservation**

Inventory of all items currently in possession of UF is complete except for boxes of paper records and oversize items at ALF. UF Received the Bertha Brown Mola Collection. They are currently being sorted and boxed while we look into the proper way to label them.

Pre-Columbian material was sorted and UF is awaiting deed of gift signatures and acquisition information. Deed of gift was received from Judy Lindsay and the gift was transferred to the Florida Museum of Natural History on 9/21/11.

Archival boxes and storage materials costs                    **UF Total \$901.00**  
Humidified and flattened 25 rolled panoramic photographs

John Freund spent approximately 72 hrs at \$30/hr working with the collection   **UF Total \$2,160**

**The current inventory is up to 9,249 items received.**

### **Government Documents**

Chelsea Dinsmore reviewed a new list of potential items to come from the PCM. She reviewed items from the last shipment from PCM. The post quality control was completed on the last shipments of Panama Canal material to go to Internet Archive (IA). This batch was mentioned in last quarter's report, but now UF has an actual invoice and the following amounts will be paid to IA:

1 item 30 foldouts / pages (\$0.23)    **UF Total: \$6.90**

95 items (books) 9116 pages (\$0.08) / 13 foldouts (\$2.00)   **UF Total \$755.28**

Chelsea spent approximately 20 hours of her time on the project this quarter. The cost share rate used is **\$29.84/hr. UF Total \$596.80.**

Work-study students spent 30 hours doing post-scanning quality review at the Federal Work Study (FWS) rate of **\$1.83/hr. UF Total \$54.90** (UF cost share of FWS).

All titles scanned for the Government Document/PCM project can be viewed at <http://www.archive.org/details/ufpancan> or also within the UF Digital Collection.

## Panama & the Canal Digital Collection

DLC	Materials and labor for processing	\$798	7/1/2011-9/30/2011
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In addition to creating and assisting with the DVDs, the Digital Library Center continued to process materials digitized externally into the *Panama & the Canal Digital Collection*. The Digital Library Center continued to digitize the Panama Canal *Spillway* newspapers and as-needed additional items, as well as responding to and routing patron email inquiries on the Panama Canal. All of the completed Panama Canal materials are available in the *Panama & the Canal Digital Collection* (<http://ufdc.ufl.edu/pcm>).

**In July 2011, the *Panama & the Canal Digital Collection* saw 49,679 views and 76,413 views in August.**

### Most Accessed Titles

Below is a list of the most commonly accessed titles within the *Panama & the Canal Digital Collection* with the numbers of views to date.

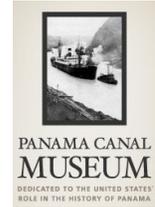
BIBID	TITLE	VIEWS
UF00094771	<a href="#">Panama Canal spillway : el Canal de Panamá spillway</a>	307311
UF00093680	<a href="#">Caribbean</a>	56250
UF00097366	<a href="#">Panama Canal review</a>	37013
UF00097368	<a href="#">Panama Canal record</a>	19001
UF00094141	<a href="#">The Makers of the Panama Canal</a>	12411
UF00097365	<a href="#">Annual report of the Governor of the Panama Canal for the fiscal year ended</a> <a href="#">--</a>	6002
UF00095973	<a href="#">Conquistador (Canal Zone Junior College)</a>	4739
UF00093678	<a href="#">Zonian</a>	4474
UF00083288	<a href="#">Leonard Carpenter Panama Canal Collection. Publication: The Panama</a>	4286

	<a href="#">Canal: Twenty-fifth Anniversary.</a>	
UF00083287	<a href="#">Leonard Carpenter Panama Canal Collection. Publication: The Canal Diggers in Panama 1904 to 1928</a>	3177
UF00098946	<a href="#">Spillway</a>	2856
UF00083281	<a href="#">Leonard Carpenter Panama Canal Collection. Photographs: Miscellaneous Photos and Negatives, Panama Canal.</a>	2663
UF00083277	<a href="#">Official Handbook of the Panama Canal</a>	2332
UF00083286	<a href="#">Leonard Carpenter Panama Canal Collection. Publication: Panama Canal Review Special Edition.</a>	2250
UF00083284	<a href="#">Leonard Carpenter Panama Canal Collection. Photographs: Views of Panama and the Canal.</a>	1535
UF00083278	<a href="#">Leonard Carpenter Panama Canal Collection. Photographs: Assorted uncaptioned photos, Panama Canal.</a>	1503
UF00074065	<a href="#">The Americans in Panama</a>	1479
UF00097364	<a href="#">Annual report - Panama Canal Company, Canal Zone Government</a>	1358
UF00097367	<a href="#">Annual report, Panama Canal Commission</a>	1351
UF00098947	<a href="#">Tropic Times</a>	1323
UF00083275	<a href="#">Leonard Carpenter Panama Canal Collection. Guide: My Trip Through the Panama Canal from the Atlantic to the Pacific.</a>	1288
UF00083279	<a href="#">Leonard Carpenter Panama Canal Collection. Photographs: Dredging, Soldiers, and Ships.</a>	1194
UF00097363	<a href="#">Annual report of the Isthmian Canal Commission for the year ending ..</a>	994

UF00095940	<a href="#">63d Cong., 1st sess. Senate. Doc. 146</a>	871
UF00098900	<a href="#">Panama Canal Museum Exhibit Materials : Cauco Race 2006</a>	866
AA00000354	<a href="#">Photographs from 1978</a>	856
UF00083276	<a href="#">Leonard Carpenter Panama Canal Collection. Miscellaneous Memorabilia, Notes and Publications regarding the Panama Canal.</a>	842
UF00098885	<a href="#">Panama Canal Museum Exhibit Materials : 1908 - 1961 Photographs</a>	837
AA00000265	<a href="#">Panama Canal review en español</a>	791
UF00098889	<a href="#">Panama Canal Museum Exhibit Materials : Housing Exhibit</a>	740
UF00097362	<a href="#">Annual report of insurance business transacted in the Canal Zone, including laws concerning licensing of insurance companies during the calendar year</a>	717
UF00093710	<a href="#">Balboa Bust, Balboa High School Monument</a>	666
UF00098892	<a href="#">Panama Canal Museum Exhibit Materials : Scouting Exhibit</a>	652
AA00004276	<a href="#">Panama Calendar</a>	633
UF00098884	<a href="#">Panama Canal Museum Exhibit Materials : Police</a>	629
AA00000275	<a href="#">CMH pub ;</a>	624
UF00098896	<a href="#">Buildings and Infrastructure</a>	622
UF00083282	<a href="#">Leonard Carpenter Panama Canal Collection. Photographs: U.S. Military Personnel, Panama Canal.</a>	580
AA00000266	<a href="#">Canal Zone code (1934)</a>	576



## The Panama Canal – Preserving a Legacy, Celebrating a Centennial, Leveraging an Extraordinary Human Achievement



### Leadership Roles

*UF clearly positions PCM/PCS current and next-generation leaders into governance and other decision/advisory roles*

- Centennial Advisory Board
- Friends of the Panama Canal Collection
- Library Leadership Board
- LAC (Latin American Collection)

### Ritual

*Key events in the PCM integration/Centennial are well-designed and resonate with PCZ cultural traditions and fully documented/promoted*

- UF-PCM Agreement signing ceremony
- Completion of PCM asset transfers
- Reunions
- Unique milestones and key personal collection transfers
- Centennial events, etc.

### Communications/Social Media

*UF drives aggressive communications programs to keep community “connected” including social media*

- Friends of the PC Collection website 2.0
- Newsletter 2.0
- Email “push” activity for content: pics, documents, etc.
- Facebook presence
- LinkedIn group
- Twitter feed for PC Collection/Friends/ Centennial

### Personal Legacy/Oral Histories

*UF address individual level legacy through aggressive programming*

- Oral history capture on-site (see Amenities/Visitations) and selectively remote for special cases
- Virtual bookplate program to recognize contributions
- Documentation of members outreach programming (video/audio/pics)

### Curatorial/Metadata/Education Roles

*UF involves PCM community expertise for integration/processing/ education at “vital” levels*

- Collection processing and metadata -
- Educational outreach both immediate and building toward Centennial
- Speaker bureaus/ subject experts/exhibition fabrication
- Donation and solicitation of collection items

### Recognition

*The PC community enjoys a fulsome recognition system for donation of dollars, collections, volunteer and expert energies*

- Working through Development, assure robust recognition strategies
- Adopt/devise new recognition strategies which proceed from Panama Canal community cultural traditions
- Extend with specific strategies for Centennial contributions

### Convening Space

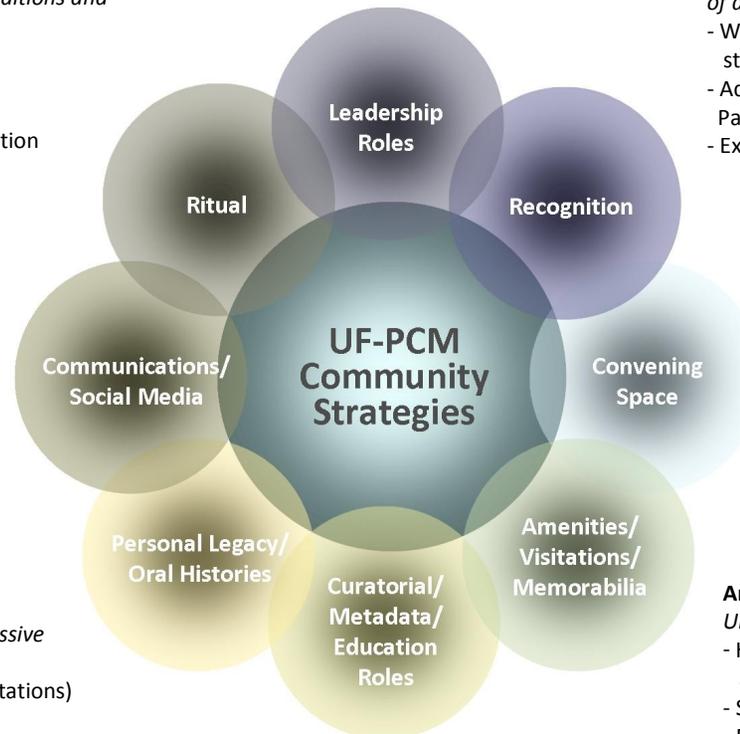
*UF established specific space to allow for both volunteer “work” and convening for PC community*

- Appropriately equipped/identified PCM collection workspaces
- Collection/community gathering/presentation space
- Alternative/additional strategies to assure sense of place for local and remote community members
- Exhibition spaces

### Amenities/Visitation

*UF becomes “pilgrimage” site for Zonians both proximate and beyond*

- Hotel packages, airport transport, “guides and personal attention”
- Special IDs with generous titling
- Panama Society events hosted/ co-sponsored at/by UF
- Behind the scenes tours/ instructional and workshops/member-only events
- Inclusion in the UF “Gator Nation”



# Resources and Relationships Map

## of the Panama Canal Museum Integration and Centennial Celebration

### Ongoing Academic Partnerships

- Association of Southeastern Research Libraries
- Bagger International Museum of the Netherlands
- Historical Museum of San Diego
- Library of Congress
- National Archives and Records Administration
- UF Center for Latin American Studies
- UF College of Engineering
- UF College of Fine Arts
- UF Samuel Proctor Oral History Program
- UF School of Business

### Public Education Programs

- K-12 Teacher Curriculum Modules
- Panama Canal Museum in a Trunk Traveling Exhibits
- Panama Canal Society Reunions
- Professional conference presentations (AAM, FAM, ACRL, etc.)
- UF Center for Latin American Studies Lecture Series
- UF Education Library
- UF Graduate Level Exhibitions Seminar

### Exhibit Venues

- Florida Museum of Natural History
- Samuel P. Harn Museum of Art
- UF George A. Smathers Libraries Website (online exhibit)
- UF Health Science Center Libraries
- UF Lawton Chiles Legal Information Center
- UF Library West (Humanities and Social Sciences Collections)
- UF Marston Science Library
- UF School of Business
- UF Smathers Library (Special and Area Studies Collections)

### Advisory Groups

#### Integration and Centennial Events

- Friends of the Panama Canal Museum
- Museum Experts Team
- Panama Canal Centennial Advisory Board
- Panama Canal Society
- UF George A. Smathers Libraries Leadership Board

### George A. Smathers Libraries

#### Collection Support and Integration

- Administration, Development and Communications
- Cataloguing and Metadata Department
- Digital Library Center
- Gifts and Exchange
- Government Documents
- Latin American Collection
- Preservation

# Donors to the Panama Canal Museum (PCM) Collection Endowment

The Panama Canal Museum (PCM) Collection Endowment supports the care and maintenance of the collection, including cataloging, digitalization, preservation and processing; planning and conducting local, traveling and

online exhibits; hosting events; acquisition of related materials to enhance the collection and making the collection available for global access. The following have generously given to the endowment.

Erich and Kathleen Aanstoos	Clare Dyer	Ida Lucille Kane	Virginia Kleefkens Rankin
Marylyn Dewey Adams	Isabel Wood Egan	Nona Kane	Bob Redfield and Carolyn Merry
Annabelle Alden	George and Roberta Williams Egolf	James and Patricia Kearns	James and Janet Stockham Reece
Victoria Hollowell Allen	Katherine Egolf	Charlotte Kerkisiek	Nancy Remak
David and Barbara Curles Aycock	William and Carol Egolf	Nancy King	Ann Richardson
Bill and Dixie Humes Ayers	Mary Ann Eldridge	Tara King	Duane and Edna Rigby
Fred and Melanie Trim Bales	Edward and Andra English	Walter H. and Suzanne Urey Kleefkens	Raymond and Forest Wise Robberson
Richard and Marcia Copenhaver	John and Marion Fahnestock	Edgar and Carol Dimpfl Kourany	Jody & Dolores Roberson
Barrere	Michael Felack	James and Grace Kraemer	Randal and Camille Robertson
John Bates	C. B. Fenton & Co., S.A.	Ernest and Barbara Bartholomew	Joanne Steiner Robinson
Dorothy Irish Beall	Leslie Firth	Krueger	Sam and Beverly Rowley
John and Ann Mackey Beers	Greg & Vicki Baldwin Fischer	Len and Maria Kujawa	Robert and Jeanne Chance Rupp
Alan P. Bentz	Curtis Fitzgerald	Raymond K. Kulig and Barbara M.	Judith Russell
Joan Scott Bernard	Mabelle Walker Fitzgerald	Hall Vose-Kulig	Robert and Cheryl Russell
Bob and Ann Cowles Best	Jacquelyn R. Forrest	Islay Lamberty	Rodney and Linda Russell
Boyd and Lucille Bevington	Robert G. Forsythe	William and Debra Egolf Lane	Don and Joni Rytter
Ruby Miriam Bissett	Mary Simpson Francis	Peter and Mary Lou Lang	Ray Sanchez and Ann Wood
David and Katy Miskovsky Bivin	Irwin Frank	Alice Whittaker Latimer	Evelyn Sanders
Margaret Bivin	Gilbert E. Freund	Brian & Julia Laverty	Dr. Rachel A. Schipper
Don and Geneva Boland	Fern Fugleberg-Rotto	Frank and Deborah Mokray Lee	Douglas and Sharon Booth Schmidt
Dr. W. Eugene and Jane Bondurant	Barbara Bartlett Garlitz	Roland Lees	William and Barbara Scott
Lt Col Robert and Mary Jill Wells	Howard and Margaret Garner	Margaret Leigh	Anthony Scottino
Bowman	Richard and Marilyn Gayer	Charles and Frank Leves	Raquel Scottino
Ronald Bowman and Kristan	Robert T. Geddes, Jr.	Amy Linden	Kathleen Lavallee Sears
Bowman	Frank J. Gerchow, Jr.	Judith R. Lindsay	Geary and Bonnie Serpas
Jim and Diane Stephenson Bradley	James and Dorothy Rowley Gerhart	Lesley M. Hendricks Litzenberger	Ruth E. Shaw
Alina Bradman	Kenneth R. Gerhart	Charlotte K. Longanacre	Frederick P Sill
Hap and Beth Brandenburg	C. Robert & Lorraine Gibson	Edwin Longanacre	Anne Sistrunk
Fred and Aurora Bremer	Juanita Jones Girand	Paul Losch	Frank M. Smith
Pamela A Brown	Paul D. Glassburn	Christine Luken	Gilbert M. and Pauline "Sue" Pincus
Richmond Brown	Thomas R. Goethals	Agnes Lyman	Smith
Kathleen McConaghy Campbell	Sharon Gonzalez	Maxine C. MacDonald	Space Coast Panazonians
Bill and Kay Cross Carson	Barbara Gorin-Sieger	Raymond Macht	Jean Spitznagle
Major Larry and Kathryn Castleman	Robert and Penny Pennington Graham	John M. Mallia	Lloyd and Margaret Spradlin
Jim Catron	Jonathon J. Green	Louis Mallia	Alex and Linda Stearns
Vernon and Ruth Studebaker Caturia	Rebecca Green	Elisa Malo-Brooks	Gary Strong
Richard and Lila Cheville	Dawn Crowell Gressang	Deborah R. Mann	James and Carol Sullivan
Rupert and Shirley E. Lee Chin	T. Richard and Diana Huff Grimison	Dottie Manthorne	Duncan W. Summerford
Sue Sartain Clark	Vincent and Pamela Maedl Gutowski	John and Jody Davies Marcum	Janet Sutherland
John Lloyd Clement	LeMoynes and Dolores Wheeler Hall	Robert and Colleen Lawson Mate	Swearingen Family
Orrin and Carol Clement	Susan Hall	Linda Mazerolle	Lewis and Sandra Taber
George R. Cockle	Gerald and Sharen Halsall	Eveline K. McClean	Christopher Tate
John and Angela Coffey	Max William Hanna	William McConaughy	Howard T. Tettenburn
Mary Morland Coffey	Thomas and Rita Hannigan	Jimmy and Alice McKeown	J. E. Dorn and Dolores M. Thomas
Michael and Shawn Coffey	Frank Stevens Hawks	William and Barbara McKeown	Jed and Janice Thomas
Carolyn Coffin Cunningham	Terrie Strey Harmon	Robert R. McMillan	Mary-Ellen McGann Thomas
Thomas G. Coffin	William J. Hatchett	Gail McNally and Herb Dawson	Jess Kyle and Gail Goodrich Totten
Howard and Lyn "Mimi" Stratford	Reggie and Bev Boyette Hayden	Children	Frank and Marvel Davison Townsend
Collins	Stevin Helin	Tom McNaughton	John and Lynn Boswell Turner
James and Frances Coman	Dona Helmerichs	Dr. Gustavo A. and Nelly Mellander	Mary Gilbert Urey
Condor Outfitters	Walter and Sandra Zumbado Herbert	Carol F. Meyer, M.D.	Edna Dahl Valentine
Alice Conover	Jack and Fran Yost Hern	Margery A. Connard Meyer	Peter Van Overen
Robert and Maureen Copeskey	Richard and Ruth Hern	Adam and Donna Malin Meyerson	Stephen and Mary Vaughn
Edward and Geraldine Pierce Corbett	Leslie and Annette Hall Highley	John and Judith Engelke Montanaro	John Viall
Sydney B. Townsend Corbett	Bernice A. Hill, Jr.	James B. Morin and Derheta Johnson	Jacqueline E. Ashton Wagner
Wendy Cotton Corrigan	Bernice A. Sanders Hill	Paul and Stacia Morgan	Jeanne Walker Wagner
John and Valerie Spencer Cronan	Dave and E. Jane Hilliard	Richard and Julieta Preciado Morgan	Richard and Yovi Wainio
J. Peter and Sara Snyder Crumpacker	Charles and Felisa Hinz	Diane Morris	Nancy Wells
Nola Bliss Culley	Carol Sergeant Hoover	John and Marie Morris	Robert Wheeler
Richard Dahlstrom	Tim and Helen Hotz	Frank and Marilyn Mott	David and Jeannine Hebert Wilder
George and Linda Huff Dany	Samuel T. and Corinna K. Huang	Robert and Vernell Lukasko Mullins	Thomas and Kathy Wilder
Judy Walton Davis	Dennis and Peggy Hale Huff	Declan and Emily Hearn Murphy	Rosemarie Bowker Wildsmith
Louis and Barbara Egolf Dedeaux	William and Jane Huff	Shirley Million Muse	James R. Williford
Jon and Debra Dedeaux	James and Joan Huffman	Ed and Joan McCullough Ohman	Edith Huff Willoughby
Bonnie (Fig) Leber Dehlinger	Ove and Billie Hultin	Arvid and Pat Olson	Lowell and Magnolia Wilson
Mary C. Nehls DeMartini	Charles and Sandra Hummer	Ronald P. Nessler	James and Maria Martinez Witte
William and Mary Derr	Louise Rathgeber Hunt	Dr. Terry Louis Palls-Morrison	Joseph and Beverly Bowman Wood
Donald and Elizabeth DeStaffino	Patrick Hutchings	John and Linda Parazyński	Thomas M. Woodell II
Gerarde DeTore	John Ingram	Deborah Pate	William and Judith Johnson Wymer
Richard and Carolyn Rowley Dillon	Gary and Judy Beeby Inman	John and Deanna Petersen	William D. and Virginia M. Coffy Young
Ed and Bonnie Davis Dolan	Gary W. Irving	Lynda Carol Philips	Deborah Zumbado
Palma Doner	Joe Jenkins	Jerry and Kay Frangioni Pierce	Robert and Marguerite Neal Zumbado
Richard and Marie Pierobon Drake	Richard and Vilma M. Lopez Johnson	Fred B. Raines	
Mort & Anna Dworken	Hubert and Margot Jordan Joseph and	Robert and Gayle Fetter Rankin	

# Cruise the Caribbean with the Panama Canal Museum



The Panama Canal Museum, which is in the process of transferring its collection to the University of Florida, is sponsoring two fundraising cruises in early 2012 and invites the University of Florida community to come along.

An 11-night cruise on Holland America's *Zuiderdam* on January 16-27 will depart from and return to Ft. Lauderdale, Florida, visiting the Bahamas, Aruba, Bonaire, Curacao, Panama and Costa Rica. \$100 off group fare prices is being offered museum members, and family membership in the museum is only \$26.

The 7-day Exotic Western Caribbean cruise on NCL's *Norwegian Star* leaves from Tampa, Florida on March 4 and returns on March 11. Excursions to Mayan ruins will be available in several of the ports, which include Roatan, Honduras; Belize City, Belize; Costa Maya, Mexico and Cozumel, Mexico. Onboard events are being planned. Fares begin at only \$469. Special prices are available to AARP members and retired military personnel on a space available basis.

More information can be obtained from the museum at 727-394-9338, [pancanalmuseum@aol.com](mailto:pancanalmuseum@aol.com) or [www.panamacanalmuseum.org](http://www.panamacanalmuseum.org) or Travel Leaders (386-445-0007, 888-652-1365, or [mail@travelleaderspc.com](mailto:mail@travelleaderspc.com)). A promotional flyer is available here: [www.uflib.ufl.edu/pio/PCM-cruise.pdf](http://www.uflib.ufl.edu/pio/PCM-cruise.pdf).

The mission of the Panama Canal Museum is to document, interpret and articulate the role played by the United States in the history of Panama, with emphasis on the construction, operation, maintenance and defense of the Panama Canal and the contributions to its success by people of all nationalities. The museum is located at 7985 113th Street, Suite 100 in Seminole, Florida.

Includes gifts received by the George A. Smathers Libraries from November 1, 2010 through September 30, 2011

## GIFTS IN KIND

### ACHDUS

Nasimi Aghayev  
Mr. Gregory R. Allen  
Mrs. Elizabeth Allen  
Ms. Shelley Arlen  
Nihad Awad  
Ms. Jessica Bara-Skowronek  
Mr. James G. Basker  
Mr. Gabriel Cabrera Becerra  
Mr. Edward G. Borgens, Jr.  
Ms. Patricia Borucki  
Mrs. Jenna Broyles  
Mr. Gene A. Budig  
Mr. R. Cary Bynum  
Dr. Roberto Cassá  
Mr. Greg Cole  
Committee for the Sixty Third Year  
Korean Economy  
Southern Company  
Rev. Joachim Cotsonis  
Mr. Emilio Cueto  
Dr. Florin Curta  
Dr. Elizabeth Dale  
Mr. Mathew Daley  
Mr. Jared Daugherty  
Ms. Suzanna Dawidowicz  
Dr. Kathleen Deagan  
Mr. Luther Deese  
Dr. Frank Di Trolio  
Kim Dong-Nyoung  
Rev. Walter Edwards  
Dr. Bonnie Effros  
Ms. Kathy Egolf  
Dr. Ron Emihovich  
Th. Jupinski Erlander  
M.Z. Farrukh  
Mr. Guillermo Fernandez  
Dr. Chuck Frazier  
Mr. Keith Fuller  
Mr. Lou Galambos  
Ms. Lauren Garber-Lake  
Dr. Andres F. Garces  
Dr. Eugene Gerberg  
Global Communications Publications  
Dr. Alex Green  
Dr. Philip Grow  
Fundacao Calouste Gulbenkian  
Dr. Gerrardo Gutierrez Mendoza  
Dr. Maurice Gyer  
Mr. Abram Harrell  
Rainer Hemgsbach-Parcham  
Mr. William vanden Heuvel  
S. Hibi  
Dr. Talley Hipp  
Houston Museum of Fine Arts  
Dr. Jacob B. Huffman  
Institute Ramon Llull  
Ms. Jeri Irwin

Ms. Sheila Grant Johnson  
Heerak Christian Kim  
Dr. Emile Kok-Kheong Yeoh  
Ms. Stephanie Koregay  
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Ms. Katherine Lane  
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Ms. June D. Littler  
Mr. Sean Macdonald  
Dr. Bernie Machen  
Mr. Victor Malta  
Mr. Jose Newton Cardosa Marchiori  
Mr. Joe Marianno  
Marine Corps History Division  
Mr. Larry Mason  
Kodo Matsunami  
Dr. Brian McCrea  
Mr. Tom Miner  
Etsuya Miyamoto  
Mr. Gerald Monsman  
Mr. Jack Moore  
Ms. Michelle Mulholland  
Dr. Gerald Murray  
New York State Museum  
Ms. Alan R. Orschel  
Ms. Stephanie Ospina  
Panama Canal Museum  
Dr. Anne Paolucci  
Mr. Bruce Peele  
Dr. Charles A. Perrone  
Ms. Rochelle Pienn  
Ms. Mary Pixley  
Mr. Russell A. Pizer  
Ms. Tina Pruitt  
Mr. Andrew Reynolds  
Mr. Steven R. Rogers  
Ms. Mary Joe Romaniuk  
Ms. Judy Russell  
Ms. Norma Jean Russell  
Dr. Warren Samuels  
Mr. Safraz Sattaur  
Dr. Gareth Schmeling  
Dr. John Seelye  
Mr. Caleb Simmons  
Mr. Kyle Thomas Smith  
Mr. Lou Somma  
Mr. David Sowell  
Dr. Halina Stephan  
Ms. Eileen Stephens  
Ms. Eileen Sullivan  
Ms. Katherine Jane Thomas  
Ms. Susan Victoria  
Mr. Edward Villalon  
Mr. Raul Fernandez Vitores  
Mr. Kent Vliet  
Mr. Jack Waters  
Ms. Sandra L. Wood  
Mr. Sam Wyly

## Biographies

### Panama Canal Centennial Advisory Board

**Patrice Brown** is a native Washingtonian (D.C.) and has worked for the National Archives and Records Administration (NARA) since 1976. She is currently a Senior Archivist and a subject matter specialist in Transportation and Panama Canal records with the Evaluation and Special Projects Division of the National Declassification Center. She has processed and described several hundred cubic feet of Panama Canal records over her thirty-six years at the Archives. She has also guided and assisted researchers and scholars at NARA utilizing these records. She has given presentations to staff and the general public concerning the Canal records in agency custody. She received her B.A. in History from Dunbarton College and her M.A. in American Studies from George Washington University. Her article entitled, “The Panama Canal: The African American Experience” appeared in the 1997 Summer Issue of *Prologue*. She is a member and has served as an elected official of several historical and archival organizations such as the National Archives Assembly, MARAC- Mid Atlantic Regional Archives Conference, and the Society for History in the Federal Government.

**Ronald de Heer**, guest-conservator for the Nationaal Baggermuseum in Sliedrecht (the Netherlands), worked on the design and construction of the museum’s Panama Canal exhibition in 2011. He holds a degree in civil engineering, specializing in port and coastal engineering from the Delft University of Technology. He served for 25 years as a lecturer on hydraulic engineering at his alma mater and has traveled extensively to investigate Canal dredging.

**Julie Greene, Ph.D.**, Professor of History at the University of Maryland at College Park, has authored or co-edited a number of books. She is the author most recently of *The Canal Builders: Making America's Empire at the Panama Canal* (Penguin Press, 2009). The Organization of American Historians awarded *The Canal Builders* its 2009 James A. Rawley Prize for the best book on the history of race relations. Greene has received fellowships from the National Endowment for the Humanities and the American Council of Learned Societies, among others. She is working now on a history of World War I and the postwar period in the United States, the Panama Canal Zone, and the Caribbean.

**Douglas S. Jones, Ph.D.**, is Director, Professor and Paleontologist at the Florida Museum of Natural History (FLMNH), University of Florida (UF). For the past several years he has worked on understanding the fossils contained in geological strata exposed by the current Canal Expansion Project with grant support from the National Science Foundation (NSF). Several professional publications have resulted and the fossils are represented in the collections of the Smithsonian as well as at the FLMNH.

**Aims McGuinness, Ph.D.**, is Associate Professor of History at the University of Wisconsin-Milwaukee. A recipient of a Fulbright Fellowship to Panama and Colombia (1998-9), he is author of *Path of Empire: Panama and the California Gold Rush* (Cornell U. Press, 2008). He was curator of the 2009-2010 exhibition at the Smithsonian Institution entitled, "Panamanian Passages/Pasajes Panameños." Co-sponsored by the Smithsonian Latino Center, the Museo del Canal Interoceánico de Panamá, and the Smithsonian Tropical Research Institute, the exhibition explored 2 million years in the history, ecology, and geology of the Isthmus of Panama.

**Paul W. Morgan, Ph.D.**, was born and raised in the Panama Canal Zone, the son of a Panama Canal government employee, and was a product of the Canal Zone school system through junior college. He holds a

doctorate degree in history from Florida State University (FSU). The title of his dissertation was "The Role of North American Women in U.S. Cultural Chauvinism in the Panama Canal Zone 1904-1945." He has served as a trustee of the Panama Canal Museum since 2000.

**Paul S. Sutter, Ph.D.**, Associate Professor of History at the University of Colorado, Boulder, is an expert on U.S. and transnational environmental history. He is currently researching and writing a book on the environmental and public health history of the construction of the Panama Canal, and he has published several articles and book chapters on the subject including, "Nature's Agents or Agents of Empire? Entomological Workers and Environmental Change during the Construction of the Panama Canal," which appeared in the December 2007 issue of *Isis* and has won several awards. His research is currently being supported by a three-year, \$146,886 National Library of Medicine (NIH) Grant, for Scholarly Works in Biomedicine and Health.

**Frank Townsend, Ph.D.**, was born and raised in the Panama Canal Zone. He is a 3<sup>rd</sup> generation "Zonian" with both grandfathers being Roosevelt Medal holders. He received his baccalaureate degree in civil engineering in 1962 from Michigan Tech and Ph.D. from Oklahoma State University (1970). He worked as a Research Civil Engineer at the Corps of Engineers Waterways Experiment Station prior to joining the Civil Engineering Faculty at UF as a Professor of Civil Engineering. He has published over fifty papers and directed over \$4 million of geotechnical research on centrifugal modeling, waste clay disposal, in situ testing, and deep foundations. He is past president of the U.S. Universities Coalition for Geotechnical Engineering Research (USUCGER), past chairman of the American Society of Civil Engineers (ASCE) Soil Properties Committee and past chairman for the International Conference of Stress Wave Applications to Piles. He is a member of ASCE's Deep Foundations Committee, and leader in the development of ASCE's Geo-Event.

**Joseph J. Wood**, Panama Canal Museum president and founding member, was born in Panama and attended the U.S. schools in the former Canal Zone. After graduating from the University of Florida (UF) he returned to Panama to work with the Panama Canal Commission, serving in several senior management positions, including Director, Office of Executive Administration, and Chief, Administrative Services Division. In 1998, he helped found the Panama Canal Museum (PCM) in Seminole, Florida, serving as president, a position he has held for all but two years of the museum's 12-year existence. Joe Wood serves on the Panama Canal Advisory Board and the Library Leadership Board, helping to be the liaison between the PCM and the developing Friends and the Panama Canal Collections.

### **Guest Lecturer**

**Edith Read Barkowitz Crouch**, an author, glass artist and teacher, lives and works in Charlotte, North Carolina. She grew up in the Panama Canal Zone. She holds an undergraduate degree in Art Education from Florida State University (FSU) and has worked in corporate communications. While studying in Florida, she traveled frequently to Winter Park's Charles Hosmer Morse Museum of American Art where she was enthralled with the works of Louis Comfort Tiffany and his talented artisans. Her first book, *The Mosaics of Louis Comfort Tiffany* was published by Schiffer Publishing, Ltd. in 2009. *Tiffany Studios Techniques: Inspiration for Today's Artists* was published by Schiffer in 2011. She returned to her background in Panama to write about the textile art of the indigenous Kuna in her latest work, *The Mola: Traditional Kuna Textile Art*.

### **Museum Experts and Evaluators**

**David Curry, MSLS**, is Managing Principal of davidrcurryAssociates, an intellectual services firm with competencies in nonprofit governance and leadership; knowledge/heritage stewardship and supporting digital strategies; market positioning, brand engineering and reputation management; and policy development and issues management. David served as Vice President, Corporate Public Affairs for Unisys Corporation, the global information technology services firm. He was a member of the senior management team for over two

decades leading the company's public affairs function. He currently serves on the Advisory Council for Center for the Future of Museums (American Association of Museums). He recently completed nine years of service as a trustee of The Franklin Institute Science Museum (Philadelphia) and he led the team in creating the Burroughs Corporation Historical Archives in preparation for the company's centennial celebration in 1984, which he led as organizing chair. David worked with the Smithsonian on two major exhibitions relating to computing. The first was with the National Museum of American History's "Information Age." He also worked with the Air & Space Museum on its major "Computing in Flight" exhibit that explored the role of computing technology in flight and space exploration. He continues active relationships with current Smithsonian staff on various digitization initiatives.

**Wit Ostrenko**, President of the Museum of Science & Industry (MOSI) for the last 24 years, has 35 years in the museum field. He holds a Bachelor's in Zoology from Florida Atlantic University, a Masters in Aquatic Ecology from the University of Miami, and a Ph.D. in Oceanography. Wit is the international immediate past president of the worldwide Association of Science Technology Centers (ASTC) and an officer of the Florida Association of Museums (FAM) and is actively involved with several community chamber and leadership organizations. He lectures on the museum profession, science topics, and creative problem solving. He leads trips into the Florida environment particularly the Everglades and the Big Cypress Swamp to help people understand and appreciate the state's natural beauty and its resources. He has led several trips for the Smithsonian Associates Travel Program. Wit has led the MOSI effort to make it the largest museum in Florida and the 5<sup>th</sup> largest science center in the U.S., which features the nation's first Head Start, an elementary school, a charter middle school, the nation's largest children's science center, and the Technology/Invention Laboratory called Idea Zone.

**Glenn Willumson, Ph.D.**, is a Professor of Art History and the Director of the Graduate Program in Museum Studies at the University of Florida (UF). He served as curator of the Getty Research Center before moving to Pennsylvania where he was senior curator at the Palmer Museum of Art. In addition to his publications Willumson has organized exhibitions on American daguerreotypes, the artists of the Stieglitz circle, the Pincus collection of contemporary art, the video work of Bill Viola, and the photographs of Allan Sekula. He has held affiliate and visiting faculty positions at the University of California, Irvine, and at The Pennsylvania State University. His forthcoming book will be published by the University of California Press and is entitled *Iron Muse: Picturing the First Transcontinental Railroad*.

**Sophia Krzys Acord, Ph.D.**, is the Associate Director of the Center for the Humanities and the Public Sphere at the University of Florida (UF). Prior to coming to UF, she was a Research Scientist at the Center for Studies in Higher Education (CSHE), University of California, Berkeley, where she managed the Andrew W. Mellon Foundation-funded Future of Scholarly Communication Project and studied scholarly communication and publication behavior, research support services, open educational resources, interdisciplinary collaboration, and public engagement. Dr. Acord holds a Ph.D. in Sociology and an M.Res. (Masters of Research Methodology) from the University of Exeter, UK, and she has published work in museum studies, qualitative research methods, information technology, and cultural sociology. Dr. Acord also provided consultancy services in the areas of digital libraries, museum evaluation, graduate student training, and online learning. At the Center for the Humanities and the Public Sphere, Dr. Acord works in program development and evaluation to support the Center's host of activities and develop new connections between academic research, museums, libraries, and technology providers.

### **Samuel Proctor Oral History Program**

**Paul Ortiz, Ph.D.**, Director of the Samuel Proctor Oral History Program, first became involved in the Panama Canal Zone in 1984 when he was assigned to the 7th Special Forces Group at Fort Davis, Panama. Shortly after

relocating to Panama from the 82nd Airborne Division, Ortiz was promoted to sergeant and served on Special Forces mobile training teams throughout Central and South America until 1986 when he received an honorable discharge. As director, Ortiz has overseen the completion of approximately fifty oral history interviews with Americans who lived, served and worked in the Panama Canal Zone between the era of World War II to present. Each summer, Ortiz leads a team of UF undergraduates and graduate students to conduct oral history interviews with members of the Panama Canal Society (PCS) and Panama Canal Museum (PCM). He has worked closely with the board of the PCM to identify interview subjects as well as to create interview guides to use in the recording sessions. Ortiz has also supervised the transcribing, editing, and podcasting of several interviews. Working in conjunction with the PCM Board, Dr. Ortiz has put together funding proposals to help move the Oral Histories' research program forward.

### **Smathers Library**

**Judith Coffey Russell**, Principal Investigator, is the Dean of University of Libraries of Florida, a position she has held since 2007. Russell is the immediate past-president of NFAIS (the National Federation of Advanced Information Services) and president-elect of the Association of Southeastern Research Libraries (ASERL). She is also a member of the Board of directors of the Association of Research Libraries (ARL). She was formerly the Managing Director, Information Dissemination and Superintendent of Documents at the U.S. Government Printing Office (GPO), the first woman and second librarian to hold that position. Prior to that, Russell served as Deputy Director of the U.S. National Commission on Libraries and Information Science (NCLIS). Russell worked for over ten years in the information industry, doing marketing and product development as well as serving as a government-industry liaison. Her corporate experience includes Information Handling Services (IHS) and its parent company, the Information Technology Group; Disclosure Information Group; Lexis-Nexis (then Mead Data Central), and IDD Digital Alliances, a subsidiary of Investment Dealers Digest. She began her professional career in special libraries, establishing the technical library for COMSAT Laboratories, the R&D arm of the Communications Satellite Corporation, as well as the research library for the U.S. Congress Office of Technology Assessment (OTA).

**Rachel A. Schipper, Ph.D.**, co-Principal Investigator, has graduate degrees in librarianship, museum studies, education and computer science and currently serves as the Associate Dean for Technology and Support Services at the University of Florida. She performed curatorial duties and installed exhibitions at the Pennsylvania State University (PSU) and has trained docents, museum studies students, and has been a thesis advisor in museum studies. Schipper has worked in librarianship at PSU, Johns Hopkins, the University of Maryland and the Florida Institute of Technology. During her 10 years as Dean of Libraries and Instructional Technology, first in West Virginia and then in Georgia, Rachel Schipper designed and coordinated the building of libraries with museum and gallery spaces, often working with donor groups and grantors—both public and private—to fund ongoing exhibitions and permanent collections. Dr. Schipper authored an article in the 2011 *Florida Libraries* entitled, "Museum and Library Partnerships: The Panama Canal Museum Joins the Gator Nation". She lived and worked in the Panama Canal Zone, and has served on the Panama Canal Museum Board, the Panama Canal Advisory Group, the Library Leadership Board, and is a member of the Panama Canal Society.

**Bess de Farber**, is the grants manager for the George A. Smathers Libraries at UF, and previously served as the University of Arizona Libraries' grants manager. She has provided grantsmanship instruction throughout the past 26 years, and has led efforts to secure millions in grant funding for nonprofits and academic libraries. Her research interest is asset-based collaboration development. As a certified professional facilitator through the International Association of Facilitators, she invented the CoLAB Planning Series®, large group processes, for individuals and organizations seeking new collaborative partnerships. This process has served more than 1,200 individuals and 600 organizations since 2002. Bess de Farber has served

on grant panels for the National Endowment for the Arts, Florida Division of Cultural Affairs, Education Foundation of Palm Beach County, Arizona State TRIF (Technology Research Initiative Fund) Awards, and The Children's Trust (Dade County). As program officer for the Community Foundation of Palm Beach and Martin Counties and Palm Beach County Cultural Council she managed the allocation of funds for arts and culture, human and race relations, and social services. *Price Waterhouse/South Florida* magazine honored her as the Up & Comer for Community Development. She holds a Master of Nonprofit Management from Florida Atlantic University, and Bachelor of Music from the University of Southern California.

**Chelsea Dinsmore** holds an MA in History from the University of Florida and a MLIS from the University of Texas, Austin. As the International Documents Librarian in the Government Documents Department within the George A. Smathers Libraries, she manages the EU (European Union) depository collection and oversees digitization efforts in the documents department. She has been the lead in developing the Association of Southeastern Research Libraries (ASERL) Panama Canal Center of Excellence (CoE) within the Collaborative Federal Depository Program, creating both a physical collection of government documents related to the creation and administration of the Canal as well as coordinating printed materials through the digitization process.

**John Freund**, head of the Conservation Unit within the George A. Smathers Libraries since 1988, is responsible for the repair and maintenance of the circulating library collections and restoration and repair of Special Collections materials. He previously worked at Stanford University, the Sutro Library in San Francisco and San Anselmo Theological Seminary Library. He taught book restoration and repair at San Francisco State University. He has built a full service conservation lab at UF. Equipment includes an ultrasonic encapsulator, a bookkeeper spray deacidification system, a cold suction table and humidity dome, several leaf casters, a blast freezer and a paper washing station able to handle flat paper up to 6x4 feet. He treats modern and rare books, maps, manuscripts, photographs and objects. As Head of the Conservation Unit, his immediate work with the Panama Canal material is to receive and inventory deliveries, ensure proper storage and document condition and damage. He supervises students and volunteers who are maintaining, correcting and completing information in the inventory database to ensure accurate information and ease of searching the collection.

**Samuel T. Huang**, Associate Dean for Advancement & Development at the George A. Smathers Libraries, previously served in this capacity at the University of Arizona Libraries (2000-07), and raised \$7 million in private funds. Prior to Arizona, he held multiple positions at Northern Illinois University including curator of rare books and special collections and assistant director for the Undergraduate Library. Huang plans and oversees major fundraising activities, public information, and grants management. Since joining UF in 2008 the development team has raised private contributions of \$7,173,827.00 (UF Foundation report includes in-kind gifts and pledges from 1,420 donors), plus \$2.97 million in government grant awards for the Libraries. Huang is nationally respected for his fundraising expertise among academic library deans and development directors. In 2005, he was featured in an article, "Conversations with Two of the Best," by John S. Wilson for *BottomLine: Managing Library Finances*, Vol. 18, no. 4, pp 191-196.

**Paul S. Losch** is a subject specialist in Latin American Studies, and has been part of the UF team working with the Panama Canal Museum to transfer their collections. He holds an MA in Latin American Studies and an MS in Library Science. He has been operations librarian in the University of Florida's Latin American Collection since 2002, overseeing public and technical services. He is an affiliate faculty member of UF's Center for Latin American Studies, and is currently on the Executive Board of the Seminar on the Acquisition of Latin American Library Materials (SALALM). He is fluent in Spanish and Portuguese, and has traveled extensively in Latin America, including a visit to Panama in 2011.

**Randall Renner**, Operation & Digital Projects Manager University of Florida Libraries, received his MFA in Creative Photography in 1997, focusing on the intersection of traditional and digital photography. Before coming to the Digital Library Center in 2002, Randall taught college level courses on computer art and montage, mixed media studio classes, black and white photography, training seminars on various computer applications, and worked as a photographer, photographing rare books, artwork, 3-D models, in a studio environment and on location. His experience in photography spans the entire process, from image capturing via digital or analog methods to the printing and display of the captured images. Renner is an imaging expert for two and three dimensional objects. He supervises all of the production units in the Digital Library Center (Copy Control/Ingest; Main, Newspaper, and Large Format Imaging; A/V Digitization; Quality Control; Text Processing and Archiving) to ensure quality control of the all production in regards to preservation and presentation. His current projects include digitizing oral histories for the Matheson Museum Digital Collection and the Samuel Proctor Oral History Program and creating three-dimensional renderings of the Harn Museum's archival objects.

**Lourdes Santamaría-Wheeler** is the Exhibits Coordinator for the University of Florida George A. Smathers Libraries. This role includes planning, directing, and organizing an active exhibition program designed to share, interpret, and promote the Libraries' collections. She serves as the designer and translator of the Digital Library of the Caribbean. Previously she was the Museum and Special Projects Coordinator at the UF Digital Library Center. She holds an MA in Museum Studies and a BFA in Creative Photography, both from UF. Her research interests include visitor participation and user-generated content in exhibits as well as exhibits as a form of scholarly publication.

**Nina Stoyan-Rosenzweig**, Health Science Center Libraries archivist and historian, develops historical programs, projects and exhibits covering J.H. Miller Health Science Center history and general history of medicine topics. She also teaches and develops programs and curricula in medical humanities. She regularly presents on and lectures in historical topics and serves on national committees related to medical humanities

**Laurie N. Taylor, Ph.D.**, is the Digital Humanities Librarian for the UF Digital Collections (UFDC), including support for existing projects and initiating discussions for potential new projects and partners. She is the technical director for the Digital Library of the Caribbean (dLOC), technical director for the Florida Digital Newspaper Library, and co-principal investigator on America's Swamp: the Historical Everglades, a project to digitize six archival collections. Prior to joining the Digital Library Center in 2007, she taught undergraduate digital humanities courses and graduate writing courses, as well as workshops on digital technologies. Her current research explores methods to digitally represent and contextualize archival materials, as well as other issues related to the digital humanities. She has published refereed articles on collaborative international digital libraries, digital media, library and information science, open access, and literature; and she co-edited a collection on digital representations of history and memory, *Playing the Past: Video Games, History, and Memory*.

## **Communications Assistant**

### **Position Description**

The Communications Assistant (.5 FTE) will work with the Director of Communications to formulate a comprehensive marketing and communications plan to promote the Panama Canal Collection at the University of Florida and all events and activities commemorating the 100<sup>th</sup> anniversary of the opening of the Canal in 2014-15. The plan will develop over the first year of the grant period in coordination with the Panama Canal Advisory Group, the Friends, and the Library Leadership Board and it will be continually monitored and adjusted as events and exhibits progress.

Prefer Bachelors degree, in journalism, media, communications and at least 2 years relevant work experience in public relations. Requires excellent writing, communication and computing skills. Administrative and organizational skills are a necessity. Must exercise good judgment, accuracy in writing, and have good people skills. This is a time-limited 3 year appointment.

Duties of the Communications Assistant will include the following activities:

- Compile, create, evaluate and disseminate communication schedule and plan
- Use interviewing, photography, writing, editing and proofreading skills to generate and disseminate press releases and to document events and activities
- Describe the collection, related projects and events in clear, concise manner for exhibit and promotional purposes
- Conceptualize, design and produce newsletters, brochures, promotional pieces, information sheets, blogs and social media, flyers, bookmarks and other materials for public relations
- Use ongoing research, information and data to identify and target appropriate audiences for communication regarding the Panama Canal Collection, events and activities
- Use knowledge of marketing conventions to enhance awareness and understanding of the Collection while utilizing the goals of advisory and Friends to support the university's mission of teaching, research and service.
- Understand and utilize public relations and development policies and procedures of the libraries and the University of Florida
- Acquire working knowledge of the AP Style of media communications and publications standards
- Develop skill with in-house printing operations
- Work closely with administration, development, library faculty and staff and collaborative partners to disseminate information and promote the libraries at local, state and national levels
- Participate in all Panama Canal related meetings, activities and support

## **Project Assistant**

### **Position Description**

The George A. Smathers Libraries are seeking a Panama Canal Project Coordinator (.5 FTE) who reports to the Associate Dean for Technology and Support Services and who is responsible for assisting with the daily management of the Panama Canal Collection. The Coordinator monitors progress in accessioning the collection, works with program staff to maintain inventory records, schedules meetings and records minutes, compiles reports and statistical information, and prepares project documentation. This position coordinates with all departments to assess needs, identify challenges and coordinate deadlines while providing administrative support.

Masters degree preferred, or its equivalent in work experience in library science, museum studies or Latin American Studies, and at least 2 years relevant work experience. Requires excellent writing, communication and computing skills. Accuracy, detail orientation and excellence in planning and organizational skills needed. This is a time-limited 3 year appointment.

Responsibilities include:

- Monitors and accessions collection while maintaining inventory – 25%
  - Position will be responsible for engaging community in the active expansion of the collection, identifying and accessioning items, routing items for conservation, preservation and/or cataloging and utilizing the Tinnell Manual (thesis prepared by UF student)
  - Inputs accessions, corrects inventory data, and identifies information gaps
  - Coordinates with departments, given knowledge of the collection, to offer research assistance
  
- Compiles reports, prepares documentation and statistical information – 20%
  - Supports quarterly and annual reports requiring quantitative and qualitative data
  - Researches and identifies relevant data to support dissemination
  - Prepares relevant documentation for presentations and publications
  
- Schedules and records minutes for meetings – 5%
  - Identifies venue/secures space
  - Facilitates conference calls, F2F and online meetings
  - Processes travel and equipment requests

## **Friends of the Panama Canal Liaison**

### **Position Description**

The George A. Smathers Libraries are seeking a Panama Canal Collection Liaison responsible for the daily management of the Panama Canal volunteer program including the recruitment, training, placement, and recognition of volunteers, development and monitoring of program budgets, and tracking of all program data. This position coordinates with all departments to assess needs, develop meaningful responsibilities for volunteers, and provide supplemental training and adequate supervision and support.

Prefer Masters degree, or its equivalent in work experience in library science, museum studies or Latin American Studies, and at least 2 years relevant work experience in a museum or library. Requires previous experience managing a volunteer program and excellent writing, communication and computing skills. Administrative, supervisory, and short- and long-range planning skills are a necessity. Must be able to coordinate numerous and diverse, concurrent programs. This is a time-limited 3 year appointment.

- Recruits and places volunteers in positions which are appropriate for the individual (serving as primary contact for all volunteers) – 30%
- Develops and implements training programs for volunteers including interpreting, organizing and articulating the collection via metadata formation (tagging of photographs and museum items for the enhancement of the digitized collection) – 15%
- Coordinates with all departments to assess departmental needs, develops meaningful positions for volunteers, and provides supervision and support – 10%
- Maintains a tracking system on volunteer numbers, hours and placement. Provides project data and develops goals for the Panama Canal Collection – 10%
- Develops new initiatives, partnerships and program opportunities – 10%
- Prepares and monitors program budgets – 10%
- Conducts volunteer program evaluation studies to inform the decision-making process for the Panama Canal Collection and makes changes as appropriate – 10%
- Recognizes volunteer contributions through service awards, evening events, and trips (sets tone of support, advocacy, and appreciation of volunteers) – 5%