

POLICY PROBLEM-SOLVING: CREATING A COMPREHENSIVE COLLECTIONS
MANAGEMENT POLICY FOR THE GOVERNMENT HOUSE MUSEUM IN HISTORIC ST.
AUGUSTINE, FLORIDA

By

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Summary of Project in Lieu of Thesis
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In 2010, the University of Florida, under the auspices of The University of Florida Historic St. Augustine, Inc. (UFHSA, Inc.), assumed management of a historic building known as Government House and its pre-existing museum and collection of objects related to the history of St. Augustine. Before this time, The Government House Museum's collection had been passively cared for, and no established guidelines or policies were in place to promote adequate collections stewardship. The UFHSA, Inc., which is charged with preserving and interpreting the state-owned properties and collections in St. Augustine, recognized the need for more attentive collections management at The Government House Museum in order to preserve its objects for the benefit of the public.

This project developed as a result of this understanding, and it involved writing a comprehensive collections management policy for The Government House Museum. A collections management policy specifies the legal, ethical and professional standards of collections care that a museum must uphold, and provides the foundation for effective collections

management. This important document outlines the responsibility of a museum's staff to its collection and establishes standardized procedures and guidelines for managing, preserving and documenting a collection that is held in public trust. A collections management policy is also a core document required for accreditation by the American Alliance of Museums (AAM), the largest professional organization of museums in the United States.

Drawing upon the standards for collections stewardship expressed by AAM, as well as the most widely respected and cited sources on collections management policies, The Government House Museum collections management policy supports the Museum's mission and is tailored to the needs of its collection. The collections management policy contains sections on authority, the scope of collections, ethics for collections, acquisitions and accessioning, loans and temporary custody, old loans and objects found in collection, care of collections, deaccessioning and insurance. When it is implemented, The Government House Museum's collections management policy will elevate the level of care provided to the collection and ensure that the Museum fulfills its mission as a University of Florida institution dedicated to long-term preservation, stewardship and interpretation of state-owned objects connected to St. Augustine.

CHAPTER ONE INTRODUCTION

In the center of historic St. Augustine, facing a large plaza, sits a building known as Government House. Although this was once the site of the Spanish governor's official office and residence during Florida's colonial period (1565-1821), the state-owned property that exists here today has, since the early 1990s, housed a small museum dedicated to interpreting the history of the City of St. Augustine. Directly adjacent to St. George Street, a popular tourist destination, and King Street, a busy thoroughfare leading in and out of the historic district and toward local beaches, the Museum is a prime location for exhibiting historical and archaeological objects related to St. Augustine for a broad local and tourist population.

Due in large part to the historical significance of St. Augustine as the longest continuously occupied city in the United States, and in order to prepare for the upcoming Quincentennial anniversary of Juan Ponce de Leon's arrival in Florida in April 1513, the Florida State Legislature authorized the University of Florida to assume management responsibilities for 38 historic buildings in St. Augustine, including Government House, in 2010 (see The 2012 Florida State Statutes, Chapter 267.1735-6). As a result, the University of Florida Historic St. Augustine, Inc. (UFHSA, Inc.) has been established in order to manage these historic properties and make decisions about their preservation and use. The UFHSA, Inc. is charged by the State of Florida with ensuring the "preservation and interpretation of state-owned historic properties in St. Augustine while facilitating an educational program at the University of Florida that will be responsive to the state's needs for professionals in historic preservation, archaeology, cultural resource management, cultural tourism, and museum administration and will help meet needs of St. Augustine and the state through educational internships and practicums," (The 2012 Florida State Statutes, Chapter 267.1735). In order to accomplish this, the UFHSA, Inc. and its board of

directors, known as the Direct Support Organization (DSO), are organized to “assist, promote, provide for, establish, maintain or operate museums or other places for exhibits and for the use of such objects, books and documents; and also to collect and preserve artifacts, relics, books, documents and exhibits of historical, educational, scientific, or other interests to scholars, students and other interested persons,” (University of Florida 2013). As this new organization takes the steps necessary to accomplish these tasks, specifically collecting and preserving artifacts for educational purposes and maintaining and operating museums, it has become important for the UFHSA, Inc. to evaluate the needs and improve the operation of the properties it is responsible for in St. Augustine.

For The Government House Museum, collections management is one of the areas that require improvement in order for the UFHSA, Inc. to manage this historic property effectively. The level of stewardship previously provided for the Museum’s collection was inadequate due in large part to poor environmental conditions in storage areas, the absence of full-time museum staff to monitor the condition and use of the collection, and the lack of policy documents to guide museum practices. The project-in-lieu-of-thesis that I have undertaken, creating a comprehensive collections management policy for The Government House Museum, is directly related to the goals of the UFHSA, Inc. and its desire to improve the Museum’s collections management practices and revitalize the role it plays in the historical interpretation of St. Augustine. This project also provides an opportunity to explore the ways in which collections management is related to the organizational structure and institutional mission of museums more generally.

Organizational Structure and Institutional Mission as the Foundation for Collections

Management

Museums play an important role in society due in large part to the collections they maintain and exhibit for the public. Works of fine art, cultural objects used by people across time, and specimens that provide insight into the natural world have been collected by museums in order to create a tangible record of art, history, culture, science, discovery and creativity that can be understood as collective human heritage. Many museums currently understand their role in society as stewards of artistic, cultural and historical heritage, responsible for preserving objects for members of the broad public community, and making them accessible and available for appreciation and educational experiences. Although there are many types of museums in existence, a museum may be broadly defined as “a public or private nonprofit agency or institution organized on a permanent basis for essentially educational or aesthetic purposes which, utilizing a professional staff, owns or utilizes tangible objects, cares for them, and exhibits them to the public on a regular basis,” (Malaro 1998:3). In this definition, there are a few phrases that can be singled out as integral components of a functional museum: “nonprofit agency or institution,” utilizes and cares for “tangible objects,” “exhibits them to the public” for “essentially educational or aesthetic purposes.” The relationship between the institution, the objects and the public, therefore, lies at the very core of museum practice and is expressed through a museum’s organizational structure and institutional mission.

The organizational structure, or structure of governance, in place at a museum provides the foundation for understanding the decisions that are made about the museum’s educational programming, exhibitions and collections management activities. For example, the organizational structure of a small, private art museum may differ from that of a national history

museum funded by the government, and the target audience, exhibitions and goals of these museums will probably vary as a result. Although a museum's organizational structure may be complex, containing many levels of authority, or may remain quite simple, the relationship between organizational structure and collections management can be understood through a model of trusteeship. According to Marie C. Malaro, trusteeship is a relationship where the assets of an organization (a museum's collection of tangible objects) are controlled by one party (the trustee or other governing authority) under an obligation to exercise its powers in a way that benefits the public (Malaro 1994:8). There is a certain level of trust tied up in this understanding, whereby the public expects a governing authority that is granted a certain level of power to be accountable to its needs.

Emphasizing the importance of this public trust relationship, Malaro suggests that there are three duties demanded of a trustee: the duty of care, or adhering to a certain level of diligence while carrying out trust duties; the duty of loyalty, requiring faithful pursuit of the purposes of the institution above personal interest; and the duty of obedience, or fidelity to the terms of the trust agreement (Malaro 1994:9). These duties can be fulfilled in part through effective collections management, whereby a museum and its staff are committed to caring for a collection of objects in such a way that the public is able to appreciate these objects now, and for the foreseeable future. To do this, there should be an understanding of the responsibilities of the museum to the public at all levels of the organizational structure, which should work together to provide guidelines for the effective operation of the museum as a whole. One of the ways this can be accomplished is through the articulation of an institutional mission statement.

In its broadest sense, a mission statement should state what a museum does, for whom, and why (AAM Mission and Institutional Planning 2012). The mission should "articulate a

compelling vision, and ensure the congruence between decisions and core values,” working to guide the actions of the museum and serve as a tool for evaluating how well it fulfills its trusteeship responsibilities (Anderson 2012:473). The mission is dependent on the organizational structure, as the educational outreach of an art museum with a university parent organization may directly target a student population, and a history museum under the authority of a city government may focus its exhibitions on the role the city has played in local history. An effective mission statement will make the relationship between the museum and the public it serves clear, and will provide the public with an understanding of what it can expect from the museum. Overall, it is the mission statement, formulated and revised as necessary by the governing authority with its trusteeship responsibilities in mind, that provides the foundation for all other practices, including collections management, that are carried out by the museum and the members of its staff.

In fact, collections management practices should directly relate to a museum’s mission and positively reinforce the understanding that collections are owned and managed by museums in trust for the public. Through day-to-day collections stewardship, understood as the “careful, sound and responsible management of that which is entrusted to a museum’s care,” (AAM Collections Stewardship 2012), collections departments and staff directly uphold the duties that are required of a trustee. As a result, the museum must be accountable for “maintaining the highest legal, ethical and professional standards, establishing policies that guide the institution’s operation and delegating specific responsibilities to staff, volunteers, and consultants through these policies,” (Simmons 2004:1). Developing and implementing a collections management policy is one important way for a museum to demonstrate its commitment to preserving

collections for the public and ensuring that the actions of the museum staff support the mission of the institution.

The Government House Museum: New Organizational Structure, New Mission, New Practice

Now that the relationship between a museum's organizational structure, mission and collections management practices is established, it is useful to examine how these elements have impacted The Government House Museum since the creation of the UFHSA, Inc. The Government House Museum has a unique organizational structure similar to a step-ladder with the State of Florida on the top rung, the University of Florida on the next, followed by the UFHSA, Inc. and its board, the DSO. The mission statement of the Museum addresses this ladder of authority, and was adopted by the DSO on May 8, 2012 as follows:

The Government House Museum, through its parent organization University of Florida Historic St. Augustine, Inc. (UFHSA, Inc.) seeks to ensure long-term preservation, stewardship, and interpretation of prehistoric, historical, and cultural artifacts and objects connected to St. Augustine, while supporting the University of Florida's broad educational and research missions. Through the unique functions of collecting, preserving, and presenting authentic artifacts, and objects, the museum intends to provide visitors with an educational experience that enhances the St. Augustine community, serves the needs of the State of Florida, and garners worldwide acclaim by preserving St. Augustine's history.

Once the Museum adopted this mission statement, it became clear that collections management practices at the Museum had to be changed in order to support the emphasis that the mission statement places on stewardship, supporting the University of Florida's educational and research missions, and collecting and preserving authentic artifacts.

The collection of objects housed at The Government House Museum was largely neglected in the past. This is evident in a rather critical report conducted in 1992 as part of the American Association of Museums (AAM, now the American Alliance of Museums) Museum

Assessment Program, or MAP. In brief, MAP is a professional evaluation process for museums that are interested in applying for AAM accreditation in the future. The MAP evaluator raised serious concerns in the report about inadequate storage facilities and environmental controls at The Government House Museum, noting that the storage was too tightly packed, the level of humidity in the building was harmful, and that the building did not have a pest management system in place (Hunter 1992:6, 17, 23, 26). Unfortunately, there were no real steps taken to remedy these problems until the UFHSA, Inc. was created and began to re-evaluate the function and goals of the Museum under a new organizational structure.

In addition to developing a mission statement for the Museum and renovating its first floor exhibition area (see Government House Historic Structure Report 2012 for more information), the UFHSA, Inc. supported the creation of a comprehensive collections management policy (CMP) to provide standards and guidelines for managing and preserving the Museum's collection of objects for the future. For my project-in-lieu-of-thesis, I wrote and compiled the following sections into one comprehensive CMP: Introduction, Mission Statement, Authority, Scope of Collections, Code of Ethics for Collections, Acquisitions and Accessioning, Loans and Temporary Custody, Old Loans and Objects Found in Collection, Care of Collections, Deaccessioning, and Insurance. It is important to note that there was no previous CMP in effect for The Government House Museum, and the final document I created is the Museum's inaugural CMP.

As a result of my experience writing The Government House Museum's CMP, I have come to appreciate the collaborative effort among museum professionals which is necessary to draft an effective museum policy. Although my experience differs from a more traditional CMP development process, specifically because I am not a member of the Museum's staff and instead

worked to develop the CMP in consultation with two of my committee members, experienced collections managers Dixie Neilson and Elise LeCompte, I have come to appreciate the level of discussion and compromise that go into this document, as well as the research and practical experience that will inform a museum's CMP. Although the staff responsible for a museum's CMP will problem-solve in their own way to create a document that is responsive to their museum's mission and organizational structure, I believe The Government House Museum's CMP has been designed to meet the Museum's current needs. The development of this CMP is an important step forward for the Museum, and provides a catalyst for the UFHSA, Inc. to accomplish its long-term goals to preserve the Museum's collection and demonstrate its trusteeship commitment to the St. Augustine community and the broader public by providing standards and guidelines for managing and preserving the Museum's collection of objects for the future.

In the following chapter, I will define CMPs and explain the role that these policy documents play in museum practice. I will then discuss specific sections of the CMP that I have written for The Government House Museum, and explore the ways in which the CMP supports the Museum's institutional mission and organizational structure. In the final chapter, I briefly address how the CMP can be used to support the Museum's goals, and provide recommendations for future research on the development of CMPs in museums that became interesting to me as a result of this project. The appendices that follow this discussion include the complete CMP written for The Government House Museum (Appendix A), as well as AAMs standards for collections stewardship (Appendix B) and Florida State Statutes referenced in the CMP (Appendix C).

CHAPTER TWO

POLICY PROBLEM-SOLVING: THE ROLE OF THE COLLECTIONS MANAGEMENT POLICY IN MUSEUM PRACTICE

A collections management policy (CMP) can be defined as “a written document, approved by the institution’s governing authority, that specifies how collections will be acquired, accessioned, documented, stored, used, cared for, and disposed of,” (Simmons 2006:168). Although it is referred to as a single policy, it is usually a compilation of many specific policies that address the components of collections management that are relevant to a museum. In general, it will include everything that is undertaken by museum staff in order to document, care for, develop and make museum collections accessible and useful for the public (Buck and Gilmore, eds. 2010:26). Furthermore, a CMP “articulates the museum’s professional standards regarding objects left in its care and serves as a guide for the staff and as a source of information for the public,” (Malaro 1998:46). An effective CMP will provide a museum’s staff with the methodology and procedures to guide all of the actions and decisions made in relation to its collection of objects.

Developing a CMP for any museum is particularly important because this document provides the means through which a museum meets both legal and ethical obligations as stewards of the public’s cultural, artistic, or historical heritage. This policy is designed to support ethical collections behavior and promote consistency in the way staff members carry out their activities. CMPs are also designed to minimize risk to a museum’s collection. When there is no clear direction or set of established guidelines for collections stewardship, mistakes can be made, which may reflect poorly on a museum and must be explained to the public (Malaro 1998:46). Having a CMP in place allows a museum to justify its actions by referencing an established policy created with attention to legally sound and ethical action. This decreases the

opportunity for misunderstanding and error that may cause harm to a collection or cause the public to believe that the trustee-beneficiary relationship has been violated.

In addition to the legal and ethical standards for collections care that are established by a CMP, this document has become mandatory for accreditation by the American Alliance of Museums (AAM). AAM accreditation is understood as a mark of distinction, offering a “high profile, peer-based validation of your museum’s operations and impact. Accreditation increases your museum’s credibility and value to funders, policy makers, community and peers,” (AAM Accreditation 2012). For this reason, many museums seek accreditation, which requires proof that a museum has incorporated professional standards into its operation. There are currently five “Core Documents” which are considered “fundamental for basic professional museum operations,” and are required for AAM accreditation: a Mission Statement, Institutional Code of Ethics, Strategic Institutional Plan, Disaster Preparedness/Emergency Response Plan, and Collections Management Policy (Alliance Reference Guide 2012:1).

The development of a CMP for The Government House Museum was undertaken with potential AAM accreditation in mind. As a result, the final document (see Appendix A) is comprehensive and addresses all of the required elements for an AAM “Core Document.” It is also consistent with AAM Standards Regarding Collections Stewardship, which are presented in *National Standards & Best Practices for U.S. Museums* (see Appendix B for the full text of these standards; The American Association of Museums 2008:46). Although a CMP is, admittedly, only one piece of the larger accreditation puzzle, creating and adopting a CMP is a necessary step for The Government House Museum, providing the Museum with one of the tools required to support its organizational structure and mission to ensure long-term preservation, care and interpretation of the objects under its care.

Mission-Driven Problem-Solving: Crafting The Government House Museum Collections Management Policy

In order to create a CMP that addresses the needs of The Government House Museum, it was necessary to continuously reflect upon the Museum's approved mission statement (see Chapter 1 and Appendix A). In addition, each section of the CMP was written in accordance with State of Florida Statutes, AAM standards and the guidelines suggested by museum professionals in a variety of well-respected publications, including John E. Simmons' *Things Great and Small: Collections Management Policies* (2006), Marie C. Malaro's *A Legal Primer on Managing Museum Collections, Second Edition* (1998), AAM's *National Standards & Best Practices for U.S. Museums* (2008) and *MRM5: Museum Registration Methods 5th Edition* (2010), edited by Rebecca A. Buck and Jean Allman Gilmore.

While the contents of a CMP are somewhat standard across the museum field in that an effective CMP will address, for example, staff responsibilities, acquiring new objects, loans, storage, use of objects in a collection, and removing objects from a collection, it is important for a CMP to be crafted on a case by case basis in order to solve problems that may be unique to a specific museum. The Government House Museum's CMP is designed to support the mission of this institution and contains a number of elements that are directly related to the Museum's collection and goals. In particular, the introductory section and the sections on deaccessioning, loans and temporary custody, and care of collections provide valuable insight into the relationship between the Museum's organizational structure and mission and the CMP that will guide its collections management activities.

The introductory section of the CMP is included to help outside readers (i.e. non-staff members or members of the public, for example) understand the decisions the Museum makes

with regard to its collection. The goal of the introductory section is to establish the purpose of the CMP, and explain the responsibility of the Museum to uphold and follow the directives made in each section of the policy (Simmons 2006:15). Laying out these points for the reader creates the context for understanding the rest of the CMP, which is especially relevant due to the nature of the Museum's board, the Direct Support Organization (DSO). The DSO is responsible for approving all official policies for the Museum and includes members who are unfamiliar with museum practices. For this reason, the introduction defines what a CMP is, how it protects the Museum from engaging in unethical or illegal behavior, and how it establishes guidelines for the staff to follow in order to properly manage the Museum's collection of objects. Due to the fact that the Museum's collection is state-owned, it was also necessary to note that the policies included do not replace or supersede any applicable State or Federal law, or University of Florida policy, under which the Museum is legally or ethically bound to abide. In addition, the introduction of the CMP provides provisions to cope with possible changes that may occur at the Museum in the future. It expresses the need to update and revise the CMP every few years, which is necessary because the Museum may undergo extensive change in its formative years.

The potential for the Museum to experience change over time is also reflected in the deaccessioning policy of the CMP. Deaccessioning, or "the process used to remove permanently an object from a museum's collection or to document the reasons for an involuntary removal (one required by law or due to circumstances not controlled by the museum)," is an integral part of collections management (Malaro 1998:217). It is also one of the most controversial and problematic museum practices. Although museums often re-evaluate their collections to ensure their current collection supports their mission, removing objects from a collection can become a point of contention with the public; if not handled openly and ethically, there may be a

significant loss of the public's trust in the museum (Simmons 2006:51-52). As a result, this section of the CMP clearly articulates the Museum's criteria for deaccessioning, the procedure for removing an object from the collection and determining an appropriate method of disposal (i.e. sale, transfer, exchange), and using any proceeds from this method of disposal in an ethically responsible manner.

Due to the nature of the Museum as part of an educational parent institution, The University of Florida, it is particularly important to indicate the appropriate methods of disposal for deaccessioned objects in order to remain consistent with the desire to use the collection for educational and research purposes. It is for this reason, for example, that the preferred methods of disposal for deaccessioned objects include moving the objects into an Education Collection maintained by the Museum, or transferring the objects to another educational institution, with priority given to other State of Florida institutions. Tailoring this section of the CMP to the needs of the Museum, which stem from its organizational structure and educationally driven mission, enables the Museum to make responsible changes to its collection over time.

The Government House Museum's mission also expresses a commitment to present authentic objects to the public that enhance the St. Augustine community, serve the needs of the State of Florida, and garner worldwide acclaim by preserving St. Augustine's history. One of the ways the Museum can accomplish these goals is by engaging in an active loan program whereby the Museum lends its own objects out to appropriate institutions and borrows objects to enhance its exhibitions and/or educational programming. In fact, this is "one way that museums meet their responsibility to disseminate knowledge and share information," (Simmons 2006:69). The CMP section on loans and temporary custody objects, or objects left in custody of the Museum for a short duration and for a particular objective, such as evaluation for acquisition, provides the

framework for the Museum to engage in loan activities that will enhance its exhibitions and support its mission. As a state owned collection of objects, however, the Museum's collection is subject to State of Florida statutes designed to protect the interests of public museums in Florida (see Appendix C). As a result, these statutes form the basis for the procedures that must be followed to receive incoming loans from other appropriate institutions.

This legislation specifies the information (i.e. the lender's name, address, and telephone number, a description of the property loaned to the Museum, the condition of the property at the time of the loan and the duration of the loan) that must be included in each loan agreement or written record documenting the terms of a loan to the Museum, and it is important for this information to be clearly expressed in the CMP. The inclusion of these requirements in the CMP helps to ensure that the Museum keeps appropriate documentation for any loan it receives in accordance with State of Florida legislation. This is only one example, out of many, where State of Florida statutes had to be referenced or excerpted in order for the CMP to provide the foundation for legal action on behalf of the Museum's collection. Many of these statutes may be unknown to the DSO or other Museum staff, and it is incredibly important to include reference to them in the CMP and keep abreast of all legislation that may impact collections management at the Museum over time.

In addition to supporting the legal mandates that stem from the Museum's organizational structure as a state institution, it is important for the CMP to reflect a genuine interest in promoting education and research through its collection of objects, and ensuring these objects will be available to the public in perpetuity. In order to do this, a CMP section addressing care of collections is imperative. In general, the care of collections section of the CMP addresses a "commitment to providing collections with an optimal storage environment, continuous

environmental monitoring, and protection from the agents of deterioration by means of a preventive conservation program,” (Simmons 2006:97). It also contains standards for object handling, access to the collection, pest control, security, storage protocols and maintaining proper documentation and records for the collection.

The primary goal of the Museum’s care of collections section is to promote more effective stewardship of the collection, and to remedy some of the problems addressed in the aforementioned MAP assessment from the early 1990s, including improper storage, unregulated environmental control and lax documentation (Hunter 1992:6,17,23,26). It is also designed to provide standards for caring for the collection that align with those expressed by AAM in *National Standards & Best Practices for U.S. Museums*, especially providing public access to the collection while ensuring its preservation, and having measures in effect to ensure the safety and security of the collection (The American Association of Museums 2008:46). To this end, the care of collections section of the CMP articulates the necessity of monitoring temperature and humidity levels in storage on a daily basis and describes some of the specific forms and reports, including documentary files, deeds of gift and condition reports, that are required for more complete record-keeping and general documentation of the collection.

In addition, the care of collections section upholds AAMs standard for providing access to the collection, and the Museum’s own mission to do the same, stating that the staff will make every reasonable effort to accommodate research and encourage students and others to learn collections management practices through supervised interaction with the collection. The collection may also afford students and researchers the opportunity to study historical material for class projects, theses or other publications. Tools in the collection, for example, could become useful in a study of construction and building techniques used to produce St.

Augustine's historic structures. These objects are capable of providing students and researchers with tangible references to the cultural heritage of St. Augustine, and the CMP ensures that the Museum makes a concerted effort to facilitate research which supports academia and increases the public's appreciation of St. Augustine's history and culture. Overall, the care of collections section of the CMP is one of the most important, due in large part to the attention it pays to the day-to-day activities and practices that must be conducted to preserve the collection for students, researchers, and the public, and support the Museum's mission to be an effective steward of Florida's heritage.

The comprehensive nature of the Museum's CMP and the attention paid to applicable State of Florida legislation and professional museum standards makes it a significant foundational document for the Museum. Although it may not explicitly address all facets of a museum's general operations, the standards, procedures and guidelines it outlines will necessarily affect the way exhibitions are developed or hosted by the Museum, and the types of educational programming that it may provide in the future. The Government House Museum's CMP is relevant to the Museum's mission, and reinforces best practices for collections management recognized by the museum community at large, enabling the Museum to move forward with its goals in a responsible way while expressing a renewed commitment to the public by ensuring the long-term preservation of the collection.

CHAPTER THREE CONCLUSION

The Government House Museum's collections management policy serves as an important foundational document that supports collections management practices that are consistent with the Museum's institutional mission, and sets the stage for accreditation by the American Alliance of Museums (AAM). When it is implemented effectively, the CMP will not only ensure that the Museum acts ethically and legally, but will provide opportunities to educate the Museum's board (the DSO), as well as members of the public about collections management and museum operations. In fact, because the UFHSA, Inc. is charged by the State of Florida with meeting the needs of St. Augustine and the state through educational internships and practicums (The 2010 Florida State Statutes, Chapter 267.1735), the Museum may provide ample opportunities to train students in collections management practices. The CMP can be utilized as a training document for interns and volunteers who become involved with the Museum's collection, providing students and members of the public with information about museum standards and ethics that will inform the practical experience they gain in collections management (Malaro 1998:46).

In addition to its applicability to the mission of the Museum, the CMP lays the groundwork for accreditation by AAM. Although the CMP is just one of five "Core Documents" required by AAM for accreditation, it sets the tone for the other policies that the Museum will need to develop. For example, the section of the CMP on collections related ethics may provide a springboard for staff to consider what museum ethics means to the Museum and how they can formulate an Institutional Code of Ethics that addresses a wide scope of museum practices. In turn, the criteria for deaccessioning provided in the CMP may inform elements of the Museum's Strategic Institutional Plan, which could involve re-evaluating the relevance of certain objects in the collection to the Museum's mission, and preparing for their transfer or sale as necessary. In

this way, the CMP becomes more than just a document required by AAM, but an expression of ideas about the role collections management plays in daily operations and its relationship to other facets of museum practice.

It is also important to note that the Museum cannot assume this 2013 version of the CMP will be perfectly applicable with the Museum's organizational structure and mission in 2023. This document should be updated and revised whenever it is appropriate to uphold the mission and educational function of the Museum. If, for example, the Museum wants to set up a "touch table" exhibition area with objects from its education collection, the care of collections section of the CMP may need to be revised in order to incorporate standards for rotating or replacing the "touch table" objects every few months. In order for the CMP to remain relevant for the Museum, it should be treated as a living document that evolves with the Museum as it changes over time.

Why Collections Management Policies and Why Now: Recommendations for Future Research

The Government House Museum's collections management policy was created at this moment in time because of the development of the UFHSA, Inc., and its goals to preserve and interpret historic properties, museums and culturally significant artifacts. This led me to consider why other museums might develop their CMPs at one particular time instead of another, and how the decision to write a CMP comes about. Although I was unable to explore these questions in depth during the course of my project-in-lieu-of-thesis, I believe it would be an interesting topic for future research. After completing The Government House Museum's collections management policy, it became apparent that many resources available on the topic of CMPs are from the relatively recent past. John Simmons' text, which is the first of its kind, and

probably the most comprehensive and useful resource about CMPs and how to develop them, was published in 2006. Furthermore, the earliest CMP from a museum that is cited in this book is from 1997 (Simmons 2006). All of the references utilized for this project-in-lieu-of-thesis are from the late 1990s to the present. I would argue that museums have placed greater emphasis on developing and implementing CMPs since the late 1990s and 2000s. There may be a variety of factors to explain this trend; I think it is very likely, however, that CMPs have become more prevalent after a variety of controversial museum practices caused public outcry and made both the media and the museum community pay closer attention to collections management.

In 2009, for example, at Brandeis University's Rose Art Museum, the University received heavy backlash against a decision to close the Museum and auction off the entire collection in an effort to alleviate some of the University's financial problems (Smith 2009:1). Fisk University came under similar fire when it decided to sell its collection of art, including works donated by Georgia O'Keefe in 1949 with the stipulation that the works would not be sold or exchanged (Annino 2007:1). Although the Tennessee Supreme Court eventually permitted Fisk to sell a fifty-percent share of its collection to The Crystal Bridges Museum in 2012, the controversy over this situation dragged on for years, and the decision to move against the intent of the donor of these works caused many to question the museum community's commitment to the public trust relationship (Kennedy 2012:1). Perhaps other museums and professional organizations such as AAM took note of the negative public reaction to this kind of activity, and articulated and clarified their own policies on deaccessioning and the use of proceeds from the disposal of collections in order to ensure they do not come under fire for their deaccessioning practices.

It is possible that understanding the relationship between controversial practices, like those that took place at the Rose Art Museum and Fisk University, and the development and implementation of CMPs in recent years could provide a more nuanced perspective of the role CMPs play in the museum community more generally, and could build upon the connection that has already been drawn between a museum's organizational structure, mission and collections management activities. Regardless of how they come about, collections management policies are now necessary policy documents for museums. They have become meaningful components of effective collections stewardship and inform a wide range of museum activities, providing one way to promote and maintain legal, ethical and professional standards, and ensure that a museum acts in the best interest of the public it has the responsibility to serve.

The Government House Museum Collections Management Policy

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Introduction

The Government House Museum's Collections Management Policy (CMP) is designed to provide the Museum and members of its staff with necessary guidelines to carry out all collections-related activities at the Museum in accordance with professional museum standards. It establishes clear procedures for the Museum to follow as it acts professionally, ethically and legally in support of the Museum's mission. It also provides a sound philosophy for the actions that must be undertaken in order to document, care for, develop and make the Museum's collection accessible and useful for the public.

As an educational institution under the management of the University of Florida Historic St. Augustine, Inc. (UFHSA, Inc.), it is important to note that all of the directives in this CMP are in full compliance with State of Florida Statutes at the time of its approval. Appropriate state statutes, national and international regulations, and professional standards established by the American Alliance of Museums (AAM) are referenced throughout this CMP, and active links to appropriate legislation or standards are provided in the text. In addition, this CMP fulfills all of the requirements for a Core Document required by AAM for institutional accreditation.

It should be understood that at the time this policy was written, the Museum had few full-time, permanent staff positions; it will be important for future staff members to develop, expand or edit this policy. For the CMP to remain relevant to the Museum and its collection over time, it should be revised by Museum staff whenever the Museum adopts a new mission statement, or establishes new goals for the collection. In general, the CMP should be periodically evaluated and updated, if necessary, at least every five years.

This CMP, which shall be implemented by the UFHSA, Inc., is a useful tool that will help the Museum and its staff maintain a high degree of stewardship for the collection that the Museum holds in trust for the University of Florida, the St. Augustine community, the citizens of the State of Florida, and the general public.

Mission Statement

The Mission Statement of The Government House Museum was adopted as follows on May 8, 2012:

The Government House Museum, through its parent organization University of Florida Historic St. Augustine, Inc. (UFHSA, Inc.) seeks to ensure long-term preservation, stewardship, and interpretation of prehistoric, historical, and cultural artifacts and objects connected to St. Augustine, while supporting the University of Florida's broad educational and research missions. Through the unique functions of collecting, preserving, and presenting authentic artifacts, and objects, the museum intends to provide visitors with an educational experience that enhances the St. Augustine community, serves the needs of the State of Florida, and garners worldwide acclaim by preserving St. Augustine's history.

Guiding Principles:

1. The UFHSA, Inc. will abide by professional standards in all museum endeavors in recognition of its obligation to provide stewardship for the artifacts in its collection.
2. The collections of the museum represent historic authenticity in order to promote accurate research, education, and further useful knowledge.
3. Due to its prominent location, as well as its architectural significance, Government House strives to be the primary point of connection to the historic districts and, through its programs and exhibitions, provide visitors with an understanding of the persons, places, and events important to Florida history.
4. Through the museum the University of Florida seeks to collaborate with institutions such as Flagler College, the National Park Service, the St. Augustine Historical Society, and religious entities, training a variety of professionals in museology, history, historic preservation, archaeology, cultural resource management, and cultural tourism.
5. The museum supports local economic development as a premier national and international heritage tourism destination.

Authority

The Government House Museum is managed by the University of Florida under the governing authority of the University of Florida Historic St. Augustine, Inc. (UFHSA, Inc.) The UFHSA, Inc. recognizes the Direct Support Organization (DSO) as its board. By virtue of [Florida State Statute 267.1736](#), the DSO is responsible for approving policies that regulate the Museum's activities.

The DSO may choose to appoint staff to assist with the day-to-day operations of the Museum. At such time, the responsibilities for collections stewardship (among other duties) may fall to the following future staff members:

The Director manages the operations of the Museum and is responsible for administration that is consistent with established policy. The Director should foster such values and practices as collaboration, communication, respect, and delegation of duties, and enables staff members to perform to the full extent of their abilities. The Director is authorized to make decisions about the Museum's collection to be approved by the DSO or other named authority. Hereafter, references to the Director mean the Director in consultation with the staff, as appropriate.

The Collections Manager directly oversees the storage, care, documentation and use of the Museum's collection. The Collections Manager reports to the Director, and has the authority to develop procedures and make day-to-day decisions about the management of the collection as deemed appropriate by professional standards. The Collections Manager advises the Director on matters related to the collection.

The Curator reports to the Director and manages the development of exhibitions organized by the Museum, as well as those on loan from other institutions. The Curator oversees the use of the collection and assists the Director in decisions concerning the scope of the Museum's collection, acquisitions, loans and deaccessions.

Departmental supervisors are responsible for making members of their staff aware of general collections care standards and, to the extent necessary to carry out their duties, the policies and procedures that are outlined in this Collections Management Policy.

Scope of Collections

The Government House Museum's collection contains state-owned objects related to the historical legacy of St. Augustine as the longest continuously occupied city in the United States, and the diverse community of past inhabitants of St. Augustine. Historical artifacts from the 17th through 19th century are maintained by the Museum. The collection is made up primarily of archaeological specimens, decorative arts, household items, tools and some weaponry.

As the Museum evolves and its mission changes, the scope of collections may evolve as well. Guidelines for collecting should be reviewed on a regular basis (at least once every five years) to ensure that they conform to the Museum's mission. Any changes made to the scope of collections should be approved by the Director, the Curator, and the DSO, and all acquisitions should be relevant to the scope of the Museum's mission.

Code of Ethics for Collections

I. Introduction

It should be noted that a separate institutional Code of Ethics is required for AAM accreditation, and will be compiled by future staff as a collective effort. The set of ethical guidelines that follows is directly related to collections activities and ensures that all members of the Museum's staff act in the best interest of the Museum and the public that it serves.

The Government House Museum fully conforms to the [Code of Ethics for Museums](#) adopted by the American Alliance of Museums (AAM). As stated in that code, the Museum's governing authority, staff and volunteers will comply with all laws and international conventions governing the Museum's public trust responsibilities. These legal standards, however, are a minimum requirement; the Museum takes additional steps to maintain the integrity of its mission and warrant public confidence through ethical action.

II. Personal Collecting

The Museum and members of its staff will not engage in collecting activities that result in the appearance of any conflict of interest. While collecting in one's field of interest is an expected activity, any personal collecting by members of the Museum staff shall be conducted openly. All employees will disclose, in writing, any personal collecting interests that may fall within the scope of the Museum's collecting interests. No staff member shall compete with the Museum in any collecting activity.

III. Other Conflicts of Interest

It is understood that no individual at the Museum will use his or her position for personal gain, or to benefit another at the expense of the Museum and the community it serves. Any appearance of impropriety or conflict of interest shall be avoided, and staff members should conduct themselves in a way that reflects positively on the Museum.

IV. Appraisals

The Tax Reform Act of 1984 prohibits museums and other organizations from providing appraisals for a donor's tax-deductible object; therefore, members of the Museum staff will neither provide nor pay for appraisals of any object that the Museum might have an interest in acquiring. Donors requiring appraisals for gift valuations may be provided with a list of at least three reputable, certified appraisers or directed to other resources. The Museum staff may conduct internal estimations of value in order to ensure adequate insurance coverage for the collection, however, these will not be shared with donors.

Acquisitions and Accessioning

I. Introduction

According to [Florida State Statute 265.706](#), The Government House Museum, “shall acquire, maintain, preserve, interpret, exhibit, and make available for study objects that have intrinsic historical or archaeological value relating to the history, government, or culture of the state. Such objects may include tangible personal property of historical or archaeological value.” In order to accomplish this, the Museum may acquire objects for its permanent collection, and shall be responsible for providing these objects with the highest level of stewardship. As a result, it is important for accessioned objects to relate to the scope of collections and support the Museum’s mission.

Objects are acquired by the University of Florida Foundation, Inc. on behalf of the Museum. The University of Florida Foundation, Inc. is an independent not-for-profit corporation that is tax exempt under Section 501(c)(3) of the U.S. Internal Revenue Service Code. The Foundation’s assets are managed by the Foundation staff and financial advisors under the direction of its Board of Directors.

II. Accession Policy

Objects may be acquired by donation, bequest, transfer, purchase or other acceptable means. All objects will be acquired in an ethical manner, and all accessioning practices will be conducted in accordance with the Museum’s code of ethics, all State of Florida statutes, and the professional standards established by the American Alliance of Museums. In addition, the Museum will not acquire objects that may have been illegally excavated, or are suspected to be in violation of the [UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer or Ownership of Cultural Property](#).

The decision to accession any object(s) will be approved by the Director or other authorized authority. The Collections Manager will be responsible for ensuring that professional accessioning procedures are carried out in a timely manner.

III. Criteria for Acquisition

Any object(s) considered for acquisition and/or accessioning must meet the following criteria:

- a. The object(s) is relevant and consistent with the Museum’s mission and scope of collections.
- b. The Museum is able to provide adequate care and storage for the object(s) in accordance with professional museum standards.
- c. The object(s) is intended to remain in the Museum’s collection for the foreseeable future.

- d. It has been firmly established that acquiring the object is in full compliance with all applicable laws and regulations addressing the acquisition, sale and transfer of cultural property, wildlife and botanical specimens.
- e. Clear and legal title to the object(s) has been established.
- f. Every effort has been made to acquire the object(s) without restrictions for use or future disposition.

IV. Accessioning Process

The Collections Committee, or those appointed to act in this capacity, may recommend objects for inclusion in the Museum's permanent collection by presenting written justification for accessioning with the appropriate criteria for acquisition clearly articulated. The Director has the final approval in all accession decisions.

While an object(s) is considered for accession, the Museum may take the object(s) into its care as a temporary custody (TC) object. A TC receipt will be created for the object(s) (see Loans and Temporary Custody).

Any object(s) donated to the Museum will become part of the permanent collection (unless designated otherwise) once an offer is made by the donor and accepted by the Museum, and the Museum has physical possession of the object(s). Acceptance of the offer is signified by the Director's signature on the Deed of Gift, memorandum of agreement or memorandum of understanding.

If an object is transferred to the Museum from another party or institution, or if an object is purchased by the Museum, all documentation regarding this activity will be retained in the object's documentary file (see Care of Collections). In the case of a transfer from one party or institution to the Museum, a transfer agreement will be completed, and signed by the Director or his/her authorized representative and the authorized representative of the transferring party or institution. If an object is a bequest, the Museum will retain a copy of the section of the will that addresses the explicit desire to bequeath the object to the Museum.

Objects accepted into the permanent collection will be assigned a unique accession number. The condition of each object(s) will be documented in a written report, and the object(s) will be photographed and tagged or physically marked with its catalog number according to professionally accepted standards in a timely manner.

V. Objects Not Accepted

The Collections Committee, or those appointed to act in this capacity, may choose not to accept a proposed acquisition into the permanent collection. At this time, if the object(s) is being held in temporary custody, the owner will be notified and must take physical possession of the object(s) within six months. The owner is responsible for return shipping costs. Alternatively, with consent of the owner, the Collections

Committee may recommend that the object(s) become part of the Education Collection (see below).

VI. Education Collection

The Museum may choose to maintain an education collection made up of unaccessioned objects. Although the Museum will be responsible for these objects, they are not intended to be kept in perpetuity as part of the collection held in public trust. The Museum will not be required to hold the object(s) to the same level of collections management afforded the Museum's permanent collection.

The Museum also plays a significant role in providing furnishings and objects to aid interpretation in local historic homes or historic sites, and will lend objects from the education collection accordingly. Loan agreements will still be required to cover objects lent from the Education Collection for this purpose. Objects from the education collection may be handled by visitors for historic demonstration or other purposes.

Loans and Temporary Custody

I. Introduction

According to [Florida State Statute 265.565\(1\)](#), “the people of Florida benefit from having property of artistic, historic, cultural, or scientific value loaned to museums in this state. Loans of such property are made to these museums for study or display in furtherance of their educational purposes.” The Government House Museum may choose to engage in loans with other institutions, allowing visitors the opportunity to experience objects that are not available in the Museum’s collection.

The Museum may loan objects from its permanent collection and education collection to other not-for-profit institutions for exhibition, scholarly research or educational use. Loans will not be made to institutions that seek to gain profit through the use of any object(s) from the Museum’s collection. Although the Museum may choose to engage in a loan with an unaccredited institution, the Museum should request an up to date facilities report from the institution in order to ensure that the standards maintained throughout the duration of the loan are similar to those that the Museum maintains for its own collection.

II. Loan Agreements

The movement of objects for all incoming and outgoing loans will be documented in a loan agreement agreed upon and signed by the Director, or an authorized representative designated by the Director, from each institution. The agreement should address the following:

- a. Method and materials used for packing the object(s)
- b. Shipping procedures and mode of transportation
- c. Necessity of couriers
- d. Insurance coverage
- e. Requirements for examination and reporting on the object’s condition
- f. Restrictions for certain activities (i.e. cleaning or reframing)
- g. Right to recall the loan

A signed copy of the loan agreement must be in the Museum’s custody before any object(s) is loaned or borrowed.

III. Duration of Loans

The beginning and end dates of each loan agreement should be clearly articulated in the loan agreement. All institutions are responsible for adhering to the established length of a loan and must return all materials as stipulated in the loan agreement.

The length of a loan agreement shall not exceed one year. Loan agreements may be renewed in one-year increments at the discretion of the Museum. Provisions for

expired or unclaimed loans can be found in the following section on old loans and objects found in collection.

IV. Outgoing Loans

1. General procedure

- a. Any appropriate institution wishing to borrow an object from the Museum's collection must submit a request in writing to the Director. The request should be made with sufficient time to consider the response and prepare for the loan, usually no less than six months in advance. The request should contain the following information: the purpose of the loan, how the object will be used and the dates of the proposed loan.
- b. The borrowing institution will provide assurance that satisfactory collections care will be maintained for all loaned objects. In order to establish this, the Collections Manager may request a facilities report or similar report from the borrowing institution.
- c. The Museum reserves the right to decline a loan request in certain circumstances, such as:
 - i. The borrowing institution does not satisfy necessary collections care or security standards.
 - ii. The use of the object(s) is deemed inappropriate.
 - iii. The object(s) requested is not available.
 - iv. The object(s) requested is not in stable condition, and is not able to withstand the rigors of shipping.
- d. The Director is responsible for approving all outgoing loans and ensuring that these loans are in the best interest of the Museum.

V. Incoming Loans

All incoming loans should have a clear connection to the Museum's mission, and will be used for exhibition, research or educational purposes. The Museum will not accept any unsolicited loans.

[Florida State Statute 265.565](#) is designed to protect the interests of public museums in Florida, and it establishes specific procedures for property loaned to museums. The following procedure for incoming loans is adapted directly from this legislation.

1. General procedure

- a. A written record of the loan is maintained by the Museum and contains, at a minimum, the lender's name, address, and telephone number, a description of the property loaned in sufficient detail for clear identification, including a description of the general condition of the property at the time of the loan, the beginning date of the loan, and the expiration date of the loan.
- b. A signed receipt or loan agreement containing the information above is provided to the lender.

- c. The Museum shall update its records whenever a lender informs the Museum of a change of address or change in ownership of the loaned object(s), a significant change in the object's value, or if the lender and the Museum negotiate a change in the duration of the loan.
- d. If any damage is sustained to a loaned object(s), the Museum will promptly notify the lender.
- e. All object(s) will be returned to the lender by the end date of the established duration of the loan agreement.
- f. Additional provisions may apply.

VI. Temporary Custody

Temporary custody objects are objects left in custody of the Museum for a short duration in order to accomplish a particular objective. In most cases, the Museum will accept a temporary custody object(s) if it is being inspected or considered for acquisition or exhibition. No object(s) shall be left at the Museum for any purpose without prior arrangement and approval by an authorized staff member. Staff at the front desk are not allowed to accept objects. The Museum retains the right to dispose of any unsolicited object(s) left at the Museum through any means considered appropriate.

Objects left in temporary custody at the request of the Museum will be covered under the Museum's insurance. Objects left by owners for their own purposes will not be insured by the Museum. No member of the Museum staff may appraise and/or authenticate any object(s) left in temporary custody.

A temporary custody receipt form will be completed for objects deposited with the Museum. It will contain the owner's contact information, the purpose of the temporary custody, a description of the object(s), and an established return date.

The established duration of a temporary custody agreement shall not exceed one year, and all activities regarding evaluation of any object(s) for acquisition shall be conducted in a timely manner.

Old Loans and Objects Found in Collection

I. Old Loans

An old loan is an expired or unclaimed loan whose lender cannot be easily found. This may include loans with indefinite durations made to the museum before the UFHSA, Inc. was established. If such a loan is discovered at the Museum, the Museum will attempt to resolve the provenance of unclaimed property.

According to [Florida State Statute 265.565\(2\)\(f\)](#), unclaimed property is designed as “property which is on loan to the museum and in regard to which the lender, or anyone acting legitimately on the lender’s behalf, has not contacted the museum for at least 25 years from the date of the beginning of the loan, if the loan was for an indefinite or undetermined period, or for at least 5 years after the date upon which the loan for a definite period expired.”

Acting under [Florida State Statute 265.565\(5\)\(a\)](#), the Museum “may terminate a loan for unclaimed property in its possession by making a good faith and reasonable search for the identity and last known address of the lender from the museum records and other records reasonably available to museum staff.” In order to do this, the following procedures are necessary:

1. A notice shall be sent via certified mail to the last known address of the lender containing the following information: the date of notice of termination, the name of the lender, a description of the property sufficient in detail for ready identification, the beginning date of the loan, if known, the termination date of the loan, if applicable, the name and address of the appropriate museum official to be contacted regarding the loan, and a statement that within 90 days of the date of the notice of termination, the lender is required to remove the property from the museum or contact the designated official in the museum to preserve the lender’s interests in the property. If the lender does not reply within 90 days, the Museum may acquire title to the unclaimed property.
2. If the lender or appropriate party cannot be identified or found after a good faith effort, or if the Museum does not receive a signed return receipt within 30 days of a notice sent by certified mail as described above, the museum shall publish the notice of termination of loan containing all the information available to the museum at least twice, 60 or more days apart, in a publication of general circulation in the county in which the museum is located and the county of the lender’s last known address, if known. If the lender or other party does not come forward, the Museum acquires title to the unclaimed property.

Throughout the process of resolving an old loan, the Museum must ensure it is operating under the most up-to-date version of the Florida State Statutes and is closely following all of the stipulations established by this legislation.

II. Objects Found in Collection

An object found in collection is an undocumented object that remains without status after all attempts have been made to reconcile the object to existing records of the permanent collection, education collection and loans made to the Museum.

It should be noted that objects found in collection differ from old loans because there is no evidence that a loan agreement was ever established between a lender and the Museum for the object(s) in question.

Upon discovery of an object(s) found in collection, the Museum will act in accordance with current law and conduct all procedures prescribed by law.

Any claimant that comes forward to claim an object(s) found in collection must prove ownership that exceeds any proof of ownership that can be offered by the Museum. The Museum will require any claimant to provide the following information in writing: a clear explanation of why the claimant believes he/she holds title to the object(s), with appropriate documentation, and a statement with supporting proof that he/she is the sole party at interest or is authorized to represent all parties at interest. If the claimant is able to provide sufficient proof of ownership, the Museum will return the object(s) and fully document this process.

The disposal of any property with unconfirmed or disputed ownership presents risks to the Museum and could be subject to legal action. As a result, any object(s) found in collection will not be sold. Whenever possible, an object(s) found in collection for which the Museum has gained legal title should be accessioned into the Museum's permanent collection, or added to the education collection.

III. Lien for Expenses Associated with Old Loans and Objects Found in Collection

In many cases, the Museum will have incurred a variety of expenses related to storage, conservation, insurance and other management expenditures for objects that become old loans or are found in collection and later claimed by a lender or owner.

Recognizing the burden this can place on museums, [Florida State Statute 265.565\(10\)](#) mandates that "a museum shall have a lien for expenses for reasonable care of loaned property unclaimed after the expiration date of the loan." If the Museum chooses to enact this lien, the lender or claimant must reimburse the Museum for expenses related to reasonable care before the claimed property can be returned.

Care of Collections

I. Introduction

The Government House Museum has assumed a legal obligation, by virtue of accessioning objects into its permanent collection, to provide ongoing care for the objects. The Museum is also responsible for the safety and condition of any objects that have entered the Museum's premises as loans or temporary custody objects. It is, therefore, of utmost importance that the Museum's staff is committed to the responsibility to care for and protect its collection, and that it carries out all actions necessary to promote proper care, preservation and stewardship of all objects in the Museum's care. The sections that follow provide standards for the Museum to store, protect, handle its objects, and manage the collection.

II. Object Care

Access to the Collection

The Government House Museum is a public institution affiliated with the University of Florida. As such, every reasonable effort will be made to ensure the collection is accessible to students, faculty, researchers and the public. When a reasonable request to view an object(s) in the collection for study or research is made in advance, the Collections Manager may arrange for a supervised visit to the Museum during normal museum hours. Each visitor will be instructed on object handling restrictions and general guidelines for visiting the storage areas. In general, no visitor will be allowed to touch objects and Museum staff must be present to assist visitors for the duration of the visit.

It should be noted that a spirit of openness does not mean that every request for access to the collection will be granted. There may be reasons why access is denied, including, but not limited to: the request is made without appropriate advance notice and/or staff is not available to carry out the request; the object(s) is restricted due to cultural sensitivities; the request involves an object(s) on exhibition or otherwise unavailable; in the opinion of the Collections Manager, the object(s) requested is not in stable condition, and may be harmed by attempts to move or view the object(s). Objects on loan from other institutions may not be available due to loan restrictions.

Preventive Conservation

Care of the Museum's collection is rooted in preventive conservation. Preventive conservation is any passive measure, such as environmental control and proper object handling, which prevents or reduces the potential for damage to the Museum's collection. Engaging in effective preventive conservation minimizes the need for costly and time-consuming conservation treatments.

Conservation Treatment

Funds for conservation treatment should be included as a budget line item so that they are available as needed. Conservation of any object(s) in the Museum's collection

shall only be undertaken after the Collections Manager, and other authorized official(s) approve treatment of the object(s) and select an appropriate and qualified conservator. Conservation priorities within the collection will be maintained based on the condition of each object and its importance to the collection. The priorities will be delineated as “Conservation Strongly Recommended,” “Minimal Conservation Recommended” and “No Conservation Recommended”. All record of conservation treatment will be kept in an object’s documentary file.

Environmental Control

Proper environmental control is one of the most important elements of effective collections care. Fluctuations in temperature and humidity can cause profound damage to objects over time; therefore, the Museum must attempt to provide stable environmental conditions anywhere objects are placed. The temperature and humidity of areas where collections are stored or exhibited should be monitored daily, and maintained at ranges that are consistent with professional museum standards. Records of environmental levels recorded by a hygrothermograph, data logger, or other similar device shall be kept in perpetuity.

Inventory

[Florida State Statute 267.115\(1\)](#) requires an annual inventory be conducted for all objects “the value or cost of which is \$500 or more and a sample inventory of such objects the value or cost of which is less than \$500.” This is understood as a minimum requirement, and periodic inventories of the Museum’s entire collection, regardless of monetary value, should be conducted at least once every five years.

Object Handling

Only collections staff members or students/interns with object handling training shall be allowed to touch or move objects in the collection. In general, visitors, untrained volunteers or donors will not be allowed to handle objects in the collection. The Collections Manager will be responsible for providing detailed object handling training as needed.

Packing and Shipping of Collection Objects

Any time an object(s) is shipped to another institution, materials that conform to professional standards will be used to ensure the object(s) has been packed securely. Every attempt should be made via packing methods to prevent the object(s) from harm during transport. The same or similar materials used for the original shipment should be used for the return shipment. A courier may accompany an object(s) to its destination if deemed necessary by the Collections Manager due to fragility, security or other concerns.

Pest Control

In Florida, pest control is always a challenge; however, the Museum will do all it can to prevent pests from contaminating the Museum’s collection. Every object received by the Museum shall be inspected for infestation before it is placed in proximity to other objects. If any object is found to be infested, the Collections Manager will

pursue an appropriate means of treatment (e.g., freezing, fumigation). The Museum will keep all storage areas clean and free of dust, dirt, food and drink, and should consult a pest management specialist as needed. Pest inspections shall be carried out on a regular basis. In addition, the Museum's grounds will be examined to minimize pest infestations. Any indication of pests should be reported immediately.

Security

To the greatest degree possible, the Museum shall provide a secure location for collections storage and protect objects under its care from theft and vandalism. Only authorized staff members, including the Director, Collections Manager, Curator and those working under their supervision, will be given access to storage areas.

Approved staff members will provide routine checks of all storage areas in order to ensure the safety of the collection. Doors leading to storage areas will remain locked at all times when storage areas are not occupied. No doors are to be propped open unless a staff member is present to guard the area. Visiting workmen, event or catering personnel should be advised against propping open exterior doors for any reason. When in areas where collections are stored or displayed, all visiting workmen, event or catering personnel will be accompanied by Museum staff. All exterior doors of the Museum should be locked and secured when not in use.

No tour to the public or other activity will be conducted in secure areas without the knowledge and consent of the Collections Manager. With the exception of visitors accompanied by the Director or Curator, a member of the Museum's collections staff must accompany all visitors. Due to space limitations, tours of more than ten people cannot be accommodated.

The Museum should diligently monitor security in exhibition spaces, assigning security guards or other staff to exhibition areas as necessary.

III. Documentation and Records

Comprehensive documentation and record keeping for each object in the permanent collection is imperative for proper collections stewardship. The Collections Manager will retain all information that is pertinent to each object in the collection. All paperwork will be organized and kept in a secure location; electronic documentation will be backed up frequently and be easily retrievable.

Documentary Files

The Collections Manager is responsible for the documentary files for each accession made by the Museum, whether by gift, purchase, bequest, transfer, exchange or other method of acquisition. Ideally, the documentary file will contain the following information: a condition report for each object, photograph of each object, provenance information, copyright/rights and reproduction information, any publication of the object(s), and other relevant notes, correspondence or documentation.

Deed of Gift

An original deed of gift should be kept in a separate archival file for each accession. The deed of gift or other written evidence for a gift should state that there is no guarantee that an object will be exhibited. It should also contain language stating that the donor transfers without condition or restriction, all right, title and interest free of encumbrances in the tangible personal property listed as the object, and all rights associated with it, to the Museum as a non-profit corporation existing under the laws of the State of Florida. The donor must certify that he/she has the full power and authority to transfer the object to the Museum. Furthermore, the donor must certify the object has not been exported from its country of origin in violation of the laws of that country in effect at the time of export and has not been imported into the United States in violation of any United States laws and/or treaties. Provenance information for each object shall be provided in as much detail as possible in order to show that there is no cause to believe the donor, owner and/or seller does not have the authority to make this transfer of title to the Museum.

Condition Reports

A detailed report of an object's condition will be made by members of the Museum staff in order to track the condition of the object over time. A condition report should be completed for an object immediately after the object is accessioned into the collection. Condition reports should be updated frequently (i.e. every time an object is exhibited, loaned, or used for research) and should utilize standard terminology and degrees of overall condition as determined by the Collections Manager.

Rights and Reproductions

Many of the objects in the Museum's collection are not subject to copyright regulations as they are archaeological or historical in nature and are either not copyrighted or subject to expired copyright due to the age of the object(s). The Museum will adhere to all laws and regulations regarding the right to reproduce images or likenesses of any object(s) in its collection. All objects in the collection should be photographed for the collections database; these photographs will also be included in the object file. These photographs will be deemed the property of the Museum and the UFHSA, Inc. Any request to use the Museum's images, or photograph any object(s) in the collection, will be subject to copyright and intellectual property laws, and must be approved by the Collections Manager. Approved requests may include, but are not limited to, students photographing an object(s) for research purposes, use of photographs for exhibition materials and use of images in an online collections archive.

Other Responsibilities

The Collections Manager is also responsible for tracking the location of all objects under the care of the Museum, including loaned objects. Museum staff should be able to locate each of the objects in the collection at any given time. In order to make this possible, the location of each object will be recorded and stored in the collections database. A location change log will be kept in storage areas to note all location changes made to an object, and the staff should be diligent in their recording

procedures. The following information should be recorded in the log: accession number of the object, a brief description of the object, the original location of the object, the new location to which the object was moved, the date of the move and the initials of the staff member who moved the object.

Deaccessioning

I. Introduction

As stated in its Mission Statement, the Government House Museum seeks to be an educational experience dedicated to effectively preserving and interpreting St. Augustine's history. In order to ensure that this mission is carried out, periodic reevaluation of the Museum's collection should be conducted. Deaccessioning, or the process of formally removing an object from a museum's permanent collection, is undertaken in order to maintain the integrity of the collection that The Government House Museum holds in trust for the benefit of the public.

The decision to deaccession an object is a serious one, and should be thoughtfully considered and carefully conducted. Deaccessioning should never reflect popular trends, the personal tastes of Museum staff or trustees, or the perceived market value of an object(s), but should always relate to the Museum's established policies and long-term goals.

Deaccessioning will be conducted transparently in accordance with [Florida State Statute 265.706](#), which provides the criteria under which historical objects may be removed from permanent collection records. This policy works to uphold this law and reflect the professional museum standards established by the American Alliance of Museums in order to promote responsible deaccessioning by the Museum.

II. Criteria for Deaccessioning

The Government House Museum retains the right to deaccession an object(s) if:

- a. The object(s) falls outside the scope of collections or is no longer consistent with the Museum's mission.
- b. The condition of the object(s) has deteriorated beyond reasonable repair, or the object(s) poses harm to the health and safety of staff/visitors and/or the preservation of other objects in the collection.
- c. The authenticity of the object(s) is determined, via consultation and/or expert opinion, to be false, misattributed or fraudulent.
- d. The object(s) is a duplicate, causing unnecessary repetition in the Museum's collection.
- e. The Museum's possession of the object(s) is determined to be inconsistent with applicable law. This may include objects that are in violation of the [UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer or Ownership of Cultural Property](#), or the Convention on International Trade in Endangered Species of Wild Flora and Fauna (CITES), are considered Nazi-era war loot, or require repatriation under legislation such as the [Native American Graves and Repatriation Act \(NAGPRA\)](#).
- f. The Museum can no longer care for, preserve, or interpret the object(s) responsibly.

III. Deaccessioning Procedure

Deaccessioning should always be conducted above board and in the open. Close adherence to the following deaccessioning procedure is necessary in order to proceed ethically and legally, and prevent violation of the public trust:

- a. With good cause, a recommendation is made by an authorized authority in favor of the deaccession of an object or group of objects.
- b. The Museum must establish clear and unrestricted legal title to the object(s) being considered for deaccessioning. The Collections Manager should consult its records and appropriate documents to ensure the following:
 - i. The object(s) has been in the permanent collection for at least one year.
 - ii. The object(s) is free of donor restrictions or other legally binding restrictions that may prohibit deaccessioning.
 - iii. Legal ownership of the object(s) has clearly passed to the Museum.
- c. Criteria for deaccessioning must be met and clearly articulated in writing by the Museum.
- d. A method of disposal is recommended.
- e. An authorized authority approves the deaccession, and the established method of disposal is carried out.
- f. All documentation related to the object(s) and its deaccession, including photography, original records and related communication, justification for deaccessioning and information regarding the final disposition of the object, is permanently retained by the Museum.

IV. Methods of Disposal

Any object(s) deaccessioned as a result of legal recourse will be disposed of in accordance with appropriate legal mandate.

In addition, if the authenticity of an object(s) is determined to be false or fraudulent in any way, the method of disposal should prevent the object(s) from reentering the market.

If the Museum maintains an education collection of unaccessioned objects for historical demonstration or loan to other historic properties in St. Augustine in order to facilitate the authentic interpretation of a particular historical period, a deaccessioned object(s) from the permanent collection may be transferred to the education collection and held by the museum for this purpose.

For objects not transferred to the education Collection, The Government House Museum's preferred method of disposal shall be transfer, exchange, or sale to another public institution. Priority shall be given to other museums within the University of Florida, or other State of Florida public museums or educational institutions.

In order to discourage illegal trafficking of archaeological material, the Museum will not sell any object(s) recovered from an archaeological site.

Secondary modes of disposal include open sale of an object(s) through public auction or destruction. Destruction is understood as a last resort.

V. Use of Proceeds

[Florida State Statute 265.706\(5\)](#) states that proceeds from the sale of collections “shall be used exclusively for the acquisition of additional historical and archaeological objects or the preservation and maintenance of any such object.” Preservation and maintenance is understood to include conservation treatment for objects in the collection and any materials used for proper care of objects in the collection.

Object(s) acquired by exchange, or via proceeds from the sale of a donated object(s) shall be credited to the donor of the original object(s).

No employee, representative or agent of the Museum, UFHSA, Inc. or the University of Florida shall receive a commission, fee, or financial benefit in connection with the sale or exchange of an object(s), nor may he or she be a business associate of any individual, firm, or organization involved in the sale or exchange. Museum staff and trustees are not permitted to participate in the public sale of any deaccessioned object(s), and cannot acquire any object(s) that has been deaccessioned from the Museum’s collection, regardless of the method by which it was disposed.

Insurance

Although the prevention of loss and damage to the collection is always preferable to compensation, The Government House Museum will maintain insurance to provide appropriate funds to restore or replace objects in the collection should they be lost or damaged.

The Museum's collection is state-owned and, as a result, the Museum may choose to adopt the [State of Florida Fine Art \(Indoor & Outdoor\) Insurance](#) policy, which is purchased and administered by the Department of Management Services, Division of State Purchasing. The provisions of this policy are subject to change, and should be consulted directly in the event of loss or damage to insured property. Instructions for reporting an insurance claim can be found online, and should be completed in a timely manner. The Museum may also purchase private fine arts insurance, or choose to be self-insured.

APPENDIX B
AMERICAN ALLIANCE OF MUSEUMS (AAM) CHARACTERISTICS OF
EXCELLENCE FOR U.S. MUSEUMS: STANDARDS REGARDING COLLECTIONS
STEWARDSHIP

Standards Regarding Collections Stewardship

- The museum owns, exhibits or uses collections that are appropriate to its mission.
- The museum legally, ethically and effectively manages, documents, cares for and uses the collections.
- The museum conducts collections-related research according to appropriate scholarly standards.
- The museum strategically plans for the use and development of its collections.
- The museum, guided by its mission, provides public access to its collections while ensuring their preservation.
- The museum allocates its space and uses its facilities to meet the needs of the collections, audience and staff.
- The museum has appropriate measures in place to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses.
- The museum takes appropriate measures to protect itself against potential risk and loss.

Purpose and Importance

Stewardship is the careful, sound and responsible management of that which is entrusted to a museum's care. Possession of collections incurs legal, social and ethical obligations to provide proper physical storage, management and care for the collections and associated documentation, as well as proper intellectual control. Collections are held in trust for the public and made accessible for the public's benefit. Effective collections stewardship ensures that the objects the museum owns, borrows, holds in its custody and/or uses are available and accessible to present and future generations. A museum's collections are an important means of advancing its mission and serving the public.

Implementation

Museums are expected to: plan strategically and act ethically with respect to collections stewardship matters; legally, ethically and responsibly acquire, manage and dispose of collection items as well as know what collections are in its ownership/custody, where they came from, why it has them and their current condition and location; and provide regular and reasonable access to, and use of, the collections/objects in its custody.

Achieving this standard requires thorough understanding of collections stewardship issues to ensure thoughtful and responsible planning and decision making. With this in mind, national standards emphasize systematic development and regular review of policies, procedures, practices and plans for the goals, activities and needs of the collections.

How Does A Museum Assess Whether Its Collections and/or Objects Are Appropriate for Its Mission?

This is determined by comparing the institution's mission—how it formally defines its unique identity and purpose, and its understanding of its role and responsibility to the public—to two things: (1) the collections used by the institution; and (2) its policies, procedures and practices regarding the development and use of collections (see also the Standards Regarding Institutional Mission Statements).

A review of a museum's collections stewardship practices examines: whether the mission statement or collections documents (e.g., collections management policy, collections plan, etc.) are clear enough to guide collections stewardship decisions; whether the collections owned by the museum, and objects loaned and exhibited at the museum, fall within the scope of the stated mission and collections documents; and whether the mission and other collections stewardship-related documents are in alignment and guide the museum's practices.

Assessing Collections Stewardship

There are different ways to manage, house, secure, document and conserve collections, depending on their media and use, and the museum's own discipline, size, physical facilities, geographic location and financial and human resources. Therefore, one must consider many facets of an institution's operations that, taken together, demonstrate the effectiveness of its collections stewardship policies, procedures and practices, and assess them in light of varying factors. For instance, museums may have diverse types of collections categorized by different levels of purpose and use—permanent, educational, archival, research and study, to name a few—that may have different management and care needs. These distinctions should be articulated in collections stewardship-related policies and procedures. In addition, different museum disciplines may have different collections stewardship practices, issues and needs related to their specific field. Museums are expected to follow the standards and best practices appropriate to their respective discipline and/or museum type as applicable.

The standards require that:

- A current, approved, comprehensive collections management policy is in effect and actively used to guide the museum's stewardship of its collections.
- The human resources are sufficient, and the staff have the appropriate education, training and experience to fulfill the museum's stewardship responsibilities and the needs of the collections.
- Staff are delegated responsibility to carry out the collections management policy.
- A system of documentation, records management and inventory is in effect to describe each object and its acquisition (permanent or temporary), current condition and location and movement into, out of and within the museum.
- The museum regularly monitors environmental conditions and takes proactive measures to mitigate the effects of ultraviolet light, fluctuations in temperature and humidity, air pollution, damage, pests and natural disasters on collections.
- An appropriate method for identifying needs and determining priorities for conservation/care is in place.

- Safety and security procedures and plans for collections in the museum's custody are documented, practiced and addressed in the museum's emergency/disaster preparedness plan.
- Regular assessment of, and planning for, collection needs (development, conservation, risk management, etc.) takes place and sufficient financial and human resources are allocated for collections stewardship.
- Collections care policies and procedures for collections on exhibition, in storage, on loan and during travel are appropriate, adequate and documented.
- The scope of a museum's collections stewardship extends to both the physical and intellectual control of its property.
- Ethical considerations of collections stewardship are incorporated into the appropriate museum policies and procedures.
- Considerations regarding future collecting activities are incorporated into institutional plans and other appropriate policy documents.

APPENDIX C
APPLICABLE 2012 FLORIDA STATE STATUTES

TITLE XVIII: PUBLIC LANDS AND PROPERTY

Chapter 265: Memorials Museums, and Arts and Culture

265.565 Property loaned to museums; obligations to lenders; notice; loan termination; acquisition of title; liens; conservation or disposal.

(1) LEGISLATIVE FINDINGS.—The people of Florida benefit from having property of artistic, historic, cultural, or scientific value loaned to museums in this state. Loans of such property are made to these museums for study or display in furtherance of their educational purposes. However, problems arise in relation to loans for indefinite or long terms when museums and lenders fail to maintain contact. Museums routinely store and care for loaned property long after loan periods have expired or should reasonably be deemed expired. In such circumstances, museums have limited rights to the use and treatment of unclaimed loan property, while at the same time they bear substantial unreimbursed expenses, including, but not limited to, costs related to storage, recordkeeping, climate control, security, periodic inspection, insurance, conservation, and general overhead. The Legislature finds and declares that it is in the public interest to establish uniform procedures governing the disposition of unclaimed property on loan to museums in the state and, more particularly, to encourage museums and their lenders to exercise due diligence in monitoring loans, to allocate fairly responsibilities between lenders and borrowing museums, to establish procedures for lenders to preserve their interests in property loaned to museums for indefinite or long terms, and to resolve expeditiously the title to unclaimed loans left in the custody of museums.

(2) DEFINITIONS.—

(a) “Lender” means an individual, corporation, partnership, trust estate, or other organization or entity whose name appears in the records of the museum as the entity legally entitled to control property on loan to the museum.

(b) “Loans,” “loaned,” or “on loan” refers to property in possession of the museum not accompanied by a transfer of title to the property or accompanied by evidence that the lender intended to retain title to the property and to return to take physical possession of the property in the future.

(c) “Museum” means a public or private not-for-profit agency or institution located in Florida and organized on a permanent basis for primarily educational, scientific, or aesthetic purposes, which owns or utilizes tangible objects, cares for them, and exhibits them to the public on a regular basis.

(d) “Property” means all tangible objects in the custody of a museum which have intrinsic historical, artistic, scientific, or cultural value.

(e) “Records” or “museum records” means documents created or held by a museum in its regular course of business.

(f) “Unclaimed property” means property which is on loan to the museum and in regard to which the lender, or anyone acting legitimately on the lender’s behalf, has not contacted the museum for at least 25 years from the date of the beginning of the loan, if the loan was for an indefinite or undetermined period, or for at least 5 years after the date upon which the loan for a definite period expired.

(3) OBLIGATIONS OF MUSEUMS TO LENDERS.—

(a) For property loaned to a museum after the effective date of this act, the museum shall:

1. Make and retain a written record containing, at a minimum, the lender's name, address, and telephone number, a description of the property loaned in sufficient detail for clear identification, including a description of the general condition of the property at the time of the loan, the beginning date of the loan, and the expiration date of the loan.
2. Provide the lender with a signed receipt or loan agreement containing, at a minimum, the record set forth in subparagraph 1.
3. Inform the lender of the existence of the provisions of this act and provide the lender with a copy of the provisions of this act upon the lender's request.

(b) Regardless of the date of a loan of property, the museum shall:

1. Update its records if a lender informs the museum of a change of address or change in ownership of property loaned, or if the lender and museum negotiate a change in the duration of the loan.
2. Inform the lender of the existence of the provisions of this act when renewing or updating the records of an existing loan and provide the lender with a copy of the provisions of this act upon the lender's request.

(c) A museum shall give a lender prompt notice of any known injury to or loss of property on loan.

(4) LENDER'S NOTICE.—

(a) It is the responsibility of the owner of property on loan to a museum to notify the museum promptly in writing of any change in the lender's address or change in ownership of the property. Failure to notify the museum of these changes may result in the owner's loss of rights to the property.

(b) It is the responsibility of a successor of a lender to document passage of rights of control of the property in the custody of a museum.

1. Unless there is evidence of bad faith or gross negligence, no museum shall be prejudiced by reason of any failure to deal with the true owner of any loaned property.
2. In cases of disputed ownership of loaned property, a museum shall not be held liable for its refusal to surrender loaned property in its possession except in reliance upon a court order or judgment.

(5) TERMINATION OF LOANS.—

(a) A museum may terminate a loan for unclaimed property in its possession by making a good faith and reasonable search for the identity and last known address of the lender from the museum records and other records reasonably available to museum staff. If the museum is able to identify the lender and the lender's last known address, the museum shall give notice to the lender that the loan is terminated pursuant to paragraph (b). If the identity or last known address of the lender remains unknown after a good faith and reasonable search, the museum shall give notice by publication pursuant to paragraph (c).

(b) A museum shall provide notice of termination of a loan of unclaimed property by sending a letter by certified mail to the lender at the lender's last known address giving notice of termination of the loan, which shall include the date of notice of termination, the name of the lender, a description of the property sufficient in detail for ready identification, the beginning date of the loan, if known, the termination date of the loan, if applicable, the name and address of the appropriate museum official to be contacted regarding the loan, and a statement that within 90 days of the date of the notice of termination, the lender is required to remove the property

from the museum or contact the designated official in the museum to preserve the lender's interests in the property. Failure to provide such notice will result in the loss of all rights in the property pursuant to subsection (6).

(c) If the museum is unable to identify sufficient information to send notice pursuant to paragraph (b), or if a signed return receipt of a notice sent by certified mail pursuant to paragraph (b) is not received by the museum within 30 days after the notice is mailed, the museum shall publish the notice of termination of loan containing all the information available to the museum provided in paragraph (b) at least twice, 60 or more days apart, in a publication of general circulation in the county in which the museum is located and the county of the lender's last known address, if known.

(6) MUSEUM GAINING TITLE TO PROPERTY; CONDITIONS.—As of the effective date of this act, a museum acquires title to unclaimed property under any of the following circumstances:

(a) For property for which a museum provides notice to a lender in accordance with paragraph (5)(b) and a signed receipt is received, if the lender of the property does not contact the museum within 90 days after the date notice was received.

(b) For property for which notice by publication is made pursuant to paragraph (5)(c), if the lender or anyone claiming a legal interest in the property does not contact the museum within 90 days after the date of the second publication.

(7) CONTRACTUAL OBLIGATIONS.—Notwithstanding the provisions of this act, a lender and museum can bind themselves to different loan provisions by written contract.

(8) EFFECT ON OTHER RIGHTS.—

(a) Property on loan to a museum shall not escheat to the state under any state escheat law but shall pass to the museum under the provisions of subsection (6).

(b) Property interests other than those specifically addressed in this act are not altered by this act.

(9) TITLE OF PROPERTY ACQUIRED FROM A MUSEUM.—A museum which acquires title to property under this act passes good title to another when transferring such property with the intent to pass title.

(10) MUSEUM LIEN FOR EXPENSES OF EXPIRED LOANS.—As of the effective date of this act, a museum shall have a lien for expenses for reasonable care of loaned property unclaimed after the expiration date of the loan.

(11) CONSERVATION OR DISPOSAL OF LOANED PROPERTY.—Unless there is a written loan agreement to the contrary, a museum may apply conservation measures to or dispose of a loaned property without a lender's permission if:

(a) Immediate action is required to protect the property on loan or to protect other property in the custody of the museum, or because the property on loan has become a hazard to the health and safety of the public or the museum's staff and:

1. The museum is unable to reach the lender at the lender's last address of record, so that the museum and the lender can promptly agree upon a solution; or

2. The lender will not agree to the protective measures the museum recommends yet is unwilling or unable to terminate the loan and retrieve the property.

(b) In the case of a lender who cannot be contacted in person, the museum publishes a notice of its intent to apply conservation measures or dispose of the property on loan in a publication of general circulation in the county in which the museum is located and the county of the lender's last known address, if known, and there is no response for 60 days. Such a notice shall also

contain the lender's name, the lender's address, if known, the date of the loan, and the name, address, and telephone number of the appropriate museum office to be contacted for information regarding the property on loan.

(12) If a museum applies conservation measures to or disposes of a property pursuant to subsection (11), the museum shall have a lien on the property and on the proceeds from any disposition thereof for the costs incurred by the museum, and the museum shall not be liable for injury to or loss of the property if:

(a) The museum had a reasonable belief at the time the action was taken that the action was necessary to protect the property on loan or other property in the custody of the museum, or that the property on loan constituted a hazard to the health and safety of the public or the museum's staff.

(b) The museum exercised reasonable care in the choice and application of conservation measures.

TITLE XVIII: PUBLIC LANDS AND PROPERTY

Chapter 265: Memorials Museums, and Arts and Culture

265.706 Objects of historical or archaeological value.

The division shall acquire, maintain, preserve, interpret, exhibit, and make available for study objects that have intrinsic historical or archaeological value relating to the history, government, or culture of the state. Such objects may include tangible personal property of historical or archaeological value. Objects acquired under this section belong to the state, and title to such objects is vested in the division.

(1) Notwithstanding s. 273.02, the division shall maintain an adequate record of all objects in its custody which have a historical or archaeological value. Once each year, on July 1 or as soon thereafter as practicable, the division shall take a complete inventory of all such objects in its custody the current value or cost of which is \$1,000 or more and a sample inventory of such objects the current value or cost of which is less than \$1,000. Each inventory shall be compared with the property record, and all discrepancies shall be traced and reconciled. Objects of historical or archaeological value are not required to be identified by marking or other physical alteration of the objects.

(2) The division may arrange for the temporary or permanent loan of any object that has historical or archaeological value in its custody. Such loans shall be for the purpose of assisting historical, archaeological, or other studies; providing objects relating to interpretive exhibits and other educational programs that promote knowledge and appreciation of Florida history and the programs of the division; or assisting the division in carrying out its responsibility to ensure proper curation of the objects.

(3) The division may determine from time to time that an object in its custody and owned by the state has no further use or value for the research, exhibit, or educational programs of the division, or that such an object will receive more appropriate maintenance and preservation by another agency, institution, or organization, and may loan, exchange, sell, or otherwise transfer ownership and custody of such object to another agency, institution, or organization for the purpose of ensuring the continued maintenance and preservation of such object, or for the purpose of acquiring another object that better serves the interests of the state and is more appropriate for promoting knowledge and appreciation of Florida history and the programs of the division.

(4) For the purpose of the exchange, sale, or other transfer of objects of historical or archaeological value, the division is exempt from chapter 273.

(5) All moneys received from the sale of an object that has historical or archaeological value pursuant to subsection (3) shall be deposited in the Grants and Donations Trust Fund and shall be used exclusively for the acquisition of additional historical and archaeological objects or the preservation and maintenance of any such objects in the custody of the division.

(6) The division shall adopt rules pursuant to ss. 120.536(1) and 120.54 which prescribe criteria for the inventory and for the loan, exchange, sale, transfer, or other disposal of state-owned objects of historical or archaeological value.

(7) Any custodian as defined in s. 273.01(1) who violates any provision of this section or any rule adopted pursuant to this section commits a misdemeanor of the second degree, punishable as provided in s. 775.082 or s. 775.083.

(8) Notwithstanding any provision of s. 287.022 or s. 287.025(1)(e), the division may enter into contracts to insure museum collections, artifacts, exhibitions, relics, and fine arts that are loaned to it or to which it holds title.

TITLE XVIII: PUBLIC LANDS AND PROPERTY

Chapter 267: Historical Resources

267.115 Objects of historical or archaeological value.

The division shall acquire, maintain, preserve, interpret, exhibit, and make available for study objects which have intrinsic historical or archaeological value relating to the history, government, or culture of the state. Such objects may include tangible personal property of historical or archaeological value. Objects acquired under this section belong to the state, and title to such objects is vested in the division.

(1) Notwithstanding s. 273.02, the division shall maintain an adequate record of all objects in its custody which have a historical or archaeological value. Once each year, on July 1 or as soon thereafter as practicable, the division shall take a complete inventory of all such objects in its custody the value or cost of which is \$500 or more and a sample inventory of such objects the value or cost of which is less than \$500. Each inventory shall be compared with the property record, and all discrepancies shall be traced and reconciled. Objects of historical or archaeological value are not required to be identified by marking or other physical alteration of the objects.

(2) The division may arrange for the temporary or permanent loan of any object which has historical or archaeological value in its custody. Such loans shall be for the purpose of assisting historical, archaeological, or other studies; providing objects relating to interpretive exhibits and other educational programs which promote knowledge and appreciation of Florida history and the programs of the division; or assisting the division in carrying out its responsibility to ensure proper curation of the objects.

(3) The division may determine from time to time that an object which is in its custody and which is owned by the state has no further use or value for the research, exhibit, or educational programs of the division, or that such an object will receive more appropriate maintenance and preservation by another agency, institution, or organization, and may loan, exchange, sell, or otherwise transfer ownership and custody of such object to another agency, institution, or organization for the purpose of ensuring the continued maintenance and preservation of such object, or for the purpose of acquiring another object which better serves the interests of the state and is more appropriate for promoting knowledge and appreciation of Florida history and the programs of the division.

(4) For the purpose of the exchange, sale, or other transfer of objects of historical or archaeological value, the division is exempt from chapter 273.

(5) All moneys received from the sale of an object which has historical or archaeological value pursuant to subsection (3) shall be deposited in the Historical Resources Operating Trust Fund and shall be used exclusively for the acquisition of additional historical and archaeological objects or the preservation and maintenance of any such objects in the custody of the division.

(6) The division shall adopt rules pursuant to ss. 120.536(1) and 120.54 that prescribe criteria for the inventory and for the loan, exchange, sale, transfer, or other disposal of state-owned objects of historical or archaeological value.

(7) Any custodian as defined in s. 273.01(1) who violates any provision of this section or any rule adopted pursuant to this section commits a misdemeanor of the second degree, punishable as provided in s. 775.082 or s. 775.083.

(8) Notwithstanding any provision of s. 287.022 or s. 287.025(1)(e), the division may enter into

contracts to insure museum collections, artifacts, relics, and fine arts to which it holds title.

(9) The division may implement a program to administer finds of isolated historic artifacts from state-owned river bottoms whereby the division may transfer ownership of such artifacts to the finder in exchange for information about the artifacts and the circumstances and location of their discovery.

TITLE XVIII: PUBLIC LANDS AND PROPERTY

Chapter 267: Historical Resources

267.1735 Historic preservation in St. Augustine; goals; contracts for historic preservation; powers and duties.

(1) The goal for contracting with the University of Florida is to ensure long-term preservation and interpretation of state-owned historic properties in St. Augustine while facilitating an educational program at the University of Florida that will be responsive to the state's needs for professionals in historic preservation, archaeology, cultural resource management, cultural tourism, and museum administration and will help meet needs of St. Augustine and the state through educational internships and practicums.

(2)(a) Upon agreement by all parties to the contracts for the management of the various state-owned properties presently subleased to and managed by the City of St. Augustine and by the University of Florida to assume the management of those properties, all existing management contracts shall be rescinded upon execution of a contract between the Board of Trustees of the Internal Improvement Trust Fund and the University of Florida for the management of those properties.

(b) The contract shall provide that the University of Florida shall use all proceeds derived from the management of these state-owned properties for the purpose of advancing historic preservation.

(3) The Board of Trustees of the Internal Improvement Trust Fund may transfer ownership and responsibility of any artifacts, documents, equipment, and other forms of tangible personal property to the University of Florida to assist the university in the transition of the management of the state-owned properties. All records, property, and unexpended balances of appropriations, allocations, or other funds associated with the state-owned properties shall be transferred to the University of Florida to be used for its historic preservation activities and responsibilities as provided in the contract with the Board of Trustees of the Internal Improvement Trust Fund. The transfer of segregated funds must be made in such a manner that the relation between program and revenue source as provided by law is retained.

(4)(a) The University of Florida is the governing body for the management and maintenance of state-owned properties contracted by this section and shall exercise those powers delegated to it by contract as well as perform all lawful acts necessary, convenient, and incident to the effectuating of its function and purpose under this section and s. 267.1736. The University of Florida may contract with its direct-support organization described in s. 267.1736 to perform all acts that are lawful and permitted for not-for-profit corporations under chapter 617 in assisting the university in carrying out its historic preservation and historic preservation education responsibilities.

(b) The university or its direct-support organization, if permitted in its contract with the university, shall have the power to engage in any lawful business or activity to establish, maintain, and operate the state-owned facilities and properties under contract with the Board of Trustees of the Internal Improvement Trust Fund, including, but not limited to:

1. The renting or leasing for revenue of any land, improved or restored real estate, or personal property directly related to carrying out the purposes for historic preservation under terms and conditions of the contract with the Board of Trustees of the Internal Improvement Trust Fund and deemed by the university to be in the best interest of the state.

2. The selling of craft products created through the operation and demonstration of historical museums, craft shops, and other facilities.
3. The limited selling of merchandise relating to the historical and antiquarian period of St. Augustine and its surrounding territory and the historical period of East Florida from the Apalachicola River to the eastern boundaries of the state.
 - (c) The university or its direct-support organization, if permitted in its contract with the university, shall have the authority to:
 1. Enter into agreements to accept credit card payments as compensation and establish accounts in credit card banks for the deposit of credit card sales invoices.
 2. Fix and collect charges for admission to any of the state-owned facilities under contract with the Board of Trustees of the Internal Improvement Trust Fund.
 3. Permit the acceptance of tour vouchers issued by tour organizations or travel agents for payment of admissions.
 4. Adopt and enforce reasonable rules to govern the conduct of the visiting public.
 - (5) Notwithstanding the provisions of s. 287.057, the University of Florida or its direct-support organization may enter into contracts or agreements with or without competitive bidding, in its discretion, for the protection or preservation of historic properties.
 - (6) Notwithstanding s. 273.055, the University of Florida may exchange, sell, or otherwise transfer any artifact, document, equipment, and other form of tangible personal property if its direct-support organization recommends such exchange, sale, or transfer to the president of the university and if it is determined that the object is no longer appropriate for the purpose of advancing historic preservation. However, any artifacts, documents, or other forms of tangible personal property that have intrinsic historical or archaeological value relating to the history, government, or culture of the state may not be exchanged, sold, or otherwise transferred without prior authorization from the Department of State.
 - (7) Notwithstanding any other provision of law, the University of Florida and its direct-support organization are eligible to match state funds in the University Major Gifts Program established in s. 1011.94.

TITLE XVIII: PUBLIC LANDS AND PROPERTY

Chapter 267: Historical Resources

267.1736 Direct-support organization.

(1) The University of Florida shall authorize a direct-support organization to assist the university in carrying out its dual historic preservation and historic preservation education purposes and responsibilities for the City of St. Augustine, St. Johns County, and the state under s. 267.1735 by raising money; submitting requests for and receiving grants from the Federal Government, the state or its political subdivisions, private foundations, and individuals; receiving, holding, investing, and administering property; and making expenditures to or for the benefit of the university. The sole purpose for the direct-support organization is to support the historic preservation efforts and historic preservation education programs and initiatives of the university. Such a direct-support organization is an organization that is:

- (a) Incorporated under the provisions of chapter 617 and approved by the Department of State as a Florida corporation not for profit;
- (b) Organized and operated to receive, hold, invest, and administer property and to make expenditures to or for the benefit of the university; and
- (c) Approved by the university to be operating for the benefit of and in a manner consistent with the goals of the university and in the best interest of the state.

(2) The number of the board of directors of the direct-support organization shall be determined by the president of the university. Membership on the board of directors of the direct-support organization shall include the professional expertise needed to ensure that the university is meeting its dual purposes of historic preservation and historic preservation education. Such membership shall include, but not be limited to, a licensed architect who has expertise in historic preservation and architectural history, a professional historian in the field of American history, and a professional archaeologist. All board members must have demonstrated interest in the preservation of Florida's historical and archaeological heritage. Membership on the board of directors must be representative of the areas of the state served by the direct-support organization and the university in its preservation efforts. The president of the university, or the president's designee, shall serve as a member of the board of directors.

(3) The direct-support organization shall operate under written contract with the university. The contract must provide for:

- (a) Approval of the articles of incorporation and bylaws of the direct-support organization by the university.
- (b) Submission of an annual budget for the approval of the university. The budget must comply with rules adopted by the university.
- (c) Certification by the university that the direct-support organization is complying with the terms of the contract and in a manner consistent with the historic preservation goals and purposes of the university and in the best interest of the state. Such certification must be made annually by the university and reported in the official minutes of a meeting of the university.
- (d) The reversion to the university, or the state if the university ceases to exist, of moneys and property held in trust by the direct-support organization for the benefit of the university if the direct-support organization is no longer approved to operate for the university or if the university ceases to exist.
- (e) The fiscal year of the direct-support organization, which must begin July 1 of each year and

end June 30 of the following year.

(f) The disclosure of material provisions of the contract and the distinction between the University of Florida and the direct-support organization to donors of gifts, contributions, or bequests, as well as on all promotional and fundraising publications.

(4) The university may authorize a direct-support organization to use its property (except money), facilities, and personal services, subject to the provisions of this section and s. 1004.28. A direct-support organization that does not provide equal employment opportunities to all persons regardless of race, color, religion, sex, age, or national origin may not use the property, facilities, or personal services of the university. For the purposes of this subsection, the term “personal services” includes full-time personnel and part-time personnel as well as payroll processing.

(5) The university shall establish policies and may adopt rules pursuant to s. 1004.28 prescribing the procedures by which the direct-support organization is governed and any conditions with which a direct-support organization must comply to use property, facilities, or personal services of the university.

(6) Any moneys may be held in a separate depository account in the name of the direct-support organization and subject to the provisions of the contract with the university. Such moneys may include lease income, admissions income, membership fees, private donations, income derived from fundraising activities, and grants applied for and received by the direct-support organization.

(7) The direct-support organization shall provide for an annual financial audit in accordance with s. 1004.28.

(8) Provisions governing direct-support organizations in s. 1004.28 and not provided in this section shall apply to the direct-support organization.

(9) Any information identifying a donor or prospective donor to the direct-support organization who desires to remain anonymous is confidential and exempt from s. 119.07(1) and s. 24(a), Art. I of the State Constitution; and that anonymity must be maintained in the auditor’s report. The university and the Auditor General shall have access to all records of the direct-support organization upon request.

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BIOGRAPHICAL SKETCH

Born and raised in Southern California, Renee Kiefer received a Bachelor of Arts in Anthropology/Archaeology and Religious Studies from Mercyhurst University in Erie, Pennsylvania in 2010. After beginning her graduate studies at the University of Florida, Renee interned in the Department of Registration and Collections at the Bowers Museum of Cultural Art in Santa Ana, California during the summer of 2011. In 2012, she co-curated an online exhibition of the University of Florida Architectural Archives at the George A. Smathers Libraries entitled, “The Preservation Conversation: Exploring Historic Preservation Processes in Florida”. Renee currently works as a Visitor Services Representative at the Florida Museum of Natural History and as a Registration Assistant for Academic Programs at the Samuel P. Harn Museum of Art in Gainesville, Florida. She can also be seen in the 2012 Art Care object handling video, “From Here to There: Museum Standards for Object Handling”. Renee plans to pursue a fulfilling career working with museum collections as a registrar/collections manager.