

COLLIN COUNTY FARM MUSEUM

COLLECTIONS MANAGEMENT

MANUAL

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INTRODUCTION

This manual contains the policies and procedures for managing the Collin County Farm Museum’s Collection. These procedures are promulgated by the Collin County Commissioners’ Court, and changes in the contents of this manual shall be made only by the Court.

County collections procedures are governed by Local Government Code, Chapter 262 and 263 unless superseded by Texas and/or Federal statutes. These statutes, including interpretations of them, are the ultimate authority on the validity of collections management procedures. Because the procedures described in this manual are based on state and federal law, this manual, in many instances, contains language taken directly from statutes, and paraphrases of and broad generalizations about statutory law have been included where appropriate to assist in applying the law in routine situations. This manual cannot address every situation; and, when an unusual situation occurs or a difficult legal or factual problem arises, the exact statutory language must be reviewed and analyzed. In every situation, the final authority for County’s collections is that of Commissioners’ Court.

This manual has been adopted by the Collin County Commissioners’ Court for use by Collin County employees and officials and is designed to assist them in complying with the laws governing the County’s collections. This manual does not create any rights of individuals or entities enforceable against Collin County.

I. STATEMENT OF GENERAL POLICY

It is the policy of Collin County that all collections activities shall be conducted strictly in accordance with state and federal laws and policies adopted by the Collin County Commissioners' Court and appropriate to the Collin County Farm Museum's mission. The County will consider:

1. The scope of the collection.
2. The use of the collection.
3. The resource considerations of acquisitions.
4. The appropriate care and regular maintenance of the collection.

Collin County intends to maintain a historically responsible collections management system conforming to best practices within the museum community. The establishment and maintenance of a good collections management system is possible only through cooperative effort.

The collections management process is not instantaneous. Time is required to complete the steps required by State and Federal Law. In order to accomplish proper collections management of products and services at the least cost to Collin County, all departments must cooperate fully.

The Collin County Farm Museum adopts the America Alliance of Museums' [Code of Ethics](#) regarding museum collections. As part of this manual, museum staff and volunteers are provided a copy and required to read the [Code of Ethics](#).

II. COLLECTIONS AUTHORITY AND GENERAL GUIDELINES

The statutory responsibility of the Collin County Farm Museum Staff is to manage all activities to ensure the collections receive the appropriate administrative and physical care and maintenance. The Collin County Farm Museum Staff shall supervise all administrative and physical activities regarding the collections. The Collin County Farm Museum Staff maintains the collection and disposes of deaccessions as provided by law.

Collin County's collections are governed by Texas statutes, Local Government Code, Chapter 262 and 263 unless superseded by Federal statutes. These statutes, including interpretations, are the ultimate authority on the validity of collections management procedures.

General guidelines for collections activities and utilization of this manual are as follows:

- A. Record potential donations or loans and evaluate the potential artifact(s) for acquisition (Source Documents, page 1 & 2).
- B. If the artifact(s) qualifies, submit request for acquisition to Commissioners Court.
- C. Processing approved acquisitions.
- D. Maintaining care, maintenance and security of artifacts.

III. AQUISITIONS

The Collin County Farm Museum acquires, holds, safeguards, maintains and administers the artifacts contained in the County's Collin County Farm Museum collection. The Collin County Farm Museum is responsible for cataloging and registering the acquired artifact(s) utilizing a central document filing system including physical and digital records. Physical files retaining documents and correspondence relating to the artifact(s) are kept by acquisition number. Digital files and digital copies of physical files are retained through usage of PastPerfect Museum Software. A copy of all digital files is provided to Homeland Security office annually due to procedures developed after September 11, 2001.

A. Necessity of Acquisitions

An acquisition is required to be submitted to Collin County Commissioners Court for all artifact(s). The purpose is:

1. To inform Collin County Commissioners of historical property being acquired.
2. To clearly define ownership of the artifact(s).
3. To confirm that resources are available to ensure proper acquisition, care and maintenance of the artifact(s).

B. Registering the Acquisition

The Collin County Farm Museum is responsible for processing the acquisition, which includes registering and cataloging the acquired artifact(s) based on the process which the artifact(s) was acquired. Registering or processing acquisitions involves assigning a numerical number associated with the acquisition which identifies the process it was acquired, the intended use of the artifact(s), as well as providing a linkage between individual objects and title transfer papers. Additionally, a minimum and maximum value is prescribed to the object.

Types of Acquisitions:

- Items gifted or donated
- Items acquired by purchase
- Items received as loans
- Items acquired through special circumstances

IV. RESPONSIBILITIES OF STAFF & DONORS OF ARTIFACTS

A. Responsibilities of Collin County Farm Museum Staff

1. Staff responsibilities are to:

- a. Obtain information about and understand the needs of the museum and the artifacts.
- b. Secure artifacts for the museum which enhance the museum's mission, educational programs and exhibits.
- c. Thoroughly research the provenance (origin and title) of artifacts in accordance with federal and state statutes:
 - [African Elephant Conservation Act of 1989](#)
 - [Antarctic Conservation Act of 1978](#)
 - [American Antiquities Act of 1906](#)
 - [Antiquities Code of Texas](#)
 - [Archaeological Resources Protection Act of 1979](#)
 - [Bald and Golden Eagle Protection Act](#)
 - [Convention on Cultural Property Implementation Act](#)
 - [Convention on International Trade in Endangered Species of Wild Fauna and Flora \(CITE\)](#)
 - [Endangered Species Act](#)
 - [Lacey Act](#)
 - [Marine Mammal Protection Act](#)
 - [Migratory Bird Treaty Act](#)
 - [National Historic Preservation Act of 1966](#)
 - [Native American Graves Protection and Repatriation Act](#)
 - [Wild Bird Conservation Act](#)
- d. Fill out a Commissioner's Court agenda request form with an attached memo making recommendations regarding potential acquisition of artifact. The memo will include a preliminary appraisal, cost estimate and a statement of whether there are available departmental funds which may be used for the acquisition of the artifact. Additional information regarding special transportation of artifact(s) may need to be included.
- e. A representative will be present at the Commissioners' Court meeting when the acquisition request for the artifact is considered.
- f. The Commissioners' Court will approve or decline the request for acquisition of the artifact.

- g. The Staff shall process approved or non-approved acquisitions of artifacts timely and efficiently. The Staff shall ensure all correspondence with potential donors and lenders are recorded.
- h. Farm Museum Staff will notify donors and lenders verbally and in writing when potential donations or loans of artifacts are approved or non-approved.

B. Responsibilities of Donors & Lenders

- a. Prepare and submit to Collin County Farm Museum Staff all specifications that may be needed through a written letter or use Source Document, page 1. Additional documentation may need to be provided, such as an appraisal for artifacts valued at \$5,000 or more (IRS Document [526](#), [561](#)).*

* Museum staff are restricted from providing external appraisals of artifacts for donors under Deficit Reduction Act of 1984, [H.R. 4170](#)

- b. If donation/loan is approved, donors/lenders will receive acquisition paperwork which must be signed and returned to the museum within 30 days.
- c. If donation/loan is not approved, donors/lenders must retrieve their artifact(s) from the museum within 30 days (if said artifact(s) are on County property).
- d. Lenders must renew their loan of an artifact annually, one year from Commissioner's Court approval date, with a written statement of intent provided to the Collin County Farm Museum. The written statement must provide accurate and current contact information.

Failure to renew the object loan of an artifact within 90 days of loan renewal deadline classifies the artifact(s) as Unclaimed Loans and enacts [Texas Property Code, Chapter 80](#).

V. REGISTRATION OF GIFTS OR DONATIONS

Acquisitions of artifacts through gifts or donations are registered according to the intended use of the artifact(s) using page 3 of Source Documents and entered into PastPerfect Museum Software.

A. Approved Gifted or Donated

1. The Collin County Farm Museum Staff completes Source Document, page 3 and 4, appropriately cataloging the artifacts according to Capital Asset Guide (Court Order No. 2008-826-09-23).
 - *Accessions* are *inexhaustible items* intended for permanent retention for use in exhibits and educational programs, but not excluded from deaccessioning or disposal.
Numerical Example of Donation: 2014.01
Numerical Example of Artifact: 2014.01.0001
 - *Digitals* are copies of archival materials to which the Collin County Farm Museum may or may not have an original copy for use in research, publications or educational materials.
Numerical Example of Digital: D2014.01
Numerical Example of Artifact: D2014.01.0001
 - *Educational* are *exhaustible items* not exhibit worthy and not intended for permanent retention. These may be used for restoration or deemed expendable because of they are duplicates or poor quality.
Numerical Example of Educational: E2014.01
Numerical Example of Artifact: E2014.01.0001
2. A Collin County Staff person who meets the requirements of a “qualified appraiser”* according to [IRS Publication 561](#), provides an internal appraisal of fair market value (minimum and maximum value) to determine if the potential donation of an artifact needs an external appraisal from the donor or needs to be included on Collin County’s asset list.**

* If no Staff meets the requirements of a qualified appraiser or the artifact(s) is beyond the staff’s experience, an IRS “qualified appraiser” may need to be consulted.
**If an artifact meets or exceeds the threshold value of \$5,000, a [Uniform Standards of Profession Appraisal Practice \(USPAP\)](#) compliant external appraisal is required.
3. Donors of artifacts are provided a copy of registration and catalog documents and their signature is recorded and filed with the Farm Museum acquisition records.
4. The paperwork relating to the artifact is scanned and entered into PastPeferfect Museum Software. Physical paperwork is filed with accession records.

5. A copy of the digital record of the artifact is filed with Homeland Security.

VI. REGISTRATION OF PURCHASED ARTIFACTS

Artifacts not acquired through donations, loans or “found” and worth less than \$5,000 are “sole source purchases” and not subject to competitive bids.

A. Approved Purchases

1. The Collin County Farm Museum Staff completes a purchase request for the proposed artifact. Please include in the “notes” section the Court Approval No. and cost of purchase. Sole-Source Purchases [LGC 262.024(a) (7)]

Typical artifacts considered sole source purchases include patented or copyrighted material, secret processes, natural monopolies, utility services, captive replacement parts or components for equipment, and films, manuscripts, or books. Such artifacts may be purchased from a sole source without competitive bidding only after the Purchasing Agent, in writing, certifies the existence of only one source to the Commissioners’ Court and the Court enters a finding of such in its minutes. [LGC 262.024(c)]

2. Contact Purchasing Department with any concerns or questions.
3. The Collin County Museum Staff will notify the Purchasing Department when artifact(s) arrive to close the Purchase Order.
4. The paperwork is scanned and entered into PastPeferfect Museum Software. Physical paperwork is filed with accession records.

VII. REGISTRATION OF LOANED ACQUISITIONS

Artifact(s) loaned to Collin County are not the property of Collin County.

A. Approved Loans

1. The Collin County Farm Museum Staff completes Incoming Loan Document, appropriately cataloging the artifacts.

Loans are artifacts intended for temporary retention for use in exhibits and educational programs.

Numerical Example of Loan: L2014.01

Numerical Example of Artifact: L2014.01.0001

2. Lenders of artifacts are provided a copy of Incoming Loan Document and catalog documents and their signature is recorded. The Incoming Loan Document with signature is returned to the Farm Museum.
3. The acquisition paperwork for the loaned artifact is scanned and entered into PastPeferfect Museum Software. Physical paperwork is filed with accession records.
4. Loans of artifacts are renewed annually from their approval date. The Collin County Farm Museum Staff sends a letter of notice 30 days prior to the renewal date.
5. Failure of Lender of an artifact to contact the Collin County Farm Museum at the end of 30 days will result in the loan being classified as an Unclaimed Loan enacting [Texas Property Code, Chapter 80](#). (See VII. Special Circumstances Acquisitions)

VIII. SPECIAL CIRCUMSTANCES ACQUISITIONS

There are special circumstances in which artifacts are acquired due to past management of the collections.

A. Unclaimed Loans, Long-Term/Indefinite Loans & Unsigned Acquisition Forms

1. The Collin County Farm Museum Staff contacts lenders of artifact to inform them of procedure changes. As a result, lenders will resubmit their loans of artifacts according to approved procedures.
2. Failure of lender to contact the Collin County Farm Museum Staff after 30 days of first attempted notice classifies the loan of artifact as an Unclaimed Loan and enacts [Texas Property Code, Chapter 80](#).
3. The Collin County Farm Museum Staff will serve notices to loaners and donors of artifact.
 - a. If the Collin County Farm Museum Staff has an address for contact, a certified letter will be sent to the lender/donor. Notice is served if proof of receipt is received within 30 days.
 - b. If the Collin County Farm Museum Staff has no address for contact or proof of receipt is not received, notice is served when the museum publishes a notice once a week for two weeks in a local newspaper.
4. If no viable claim to the artifact(s) is made 65 days after the date of the last notice, the title of the artifact belongs to Collin County.
5. All artifacts acquired through Special Acquisitions must be processed as donations (See Section V.)

B. Found-in-Collections (FIC)

FICs are objects found among museum artifacts without documentation of donors or lenders. The Collin County Farm Museum staff uses past inventories to determine if the object has been on Collin County property for 15 years or more.

1. Any artifact recorded in the inventory as being in the Collin County Farm Museum's possession for 15 years or more and to which no person has made claim according to the records of the museum are considered abandoned and must be processed as donations (See Section V.)
2. Any artifact recorded in the inventory as being in the Collin County Farm Museum's possession for less than 15 years or not included in the inventories of artifacts will be posted as a notice.

- a. Notice is served when the Museum publishes a notice once a week for two weeks in a local newspaper.
- b. To claim ownership, potential owners must provide proof of ownership of the artifact.
- c. If no viable claim to the artifact(s) is made 65 days after the date of the last notice, the title of the artifact belongs to Collin County.
- d. All artifacts acquired through Special Acquisitions must be processed as donations (See Section V.)

IX. DISPOSITION

The Collin County Commissioners may dispose of its artifacts according to LGC 263, if the artifact meets one or more of the evaluation criteria on the Disposition Form or if the Museum is being closed temporarily or permanently.

1. The Collin County Farm Museum Staff will contact Purchasing to initiate disposition process according to LGC 263.152 and make recommendations.

Note: If Collin County's ownership of the artifact is restricted, the Collin County Farm Museum Staff will inform Purchasing of special conditions restricting disposition of the artifact. Additionally, the Staff will assist Purchasing if restriction stipulations of the artifact are not able to be met.

Note: If Purchasing department determines that the disposal method of the artifact through sale, funds will be directed to the "Farm Museum Fund – Donations" re Capital Asset Guide (Court Order No. 2008-826-09-23).

2. Purchasing will provide a copy of disposition documentation for the Collin County Farm Museum artifact files.

X. INVENTORY

To ensure the security and safety of the Collin County Farm Museum artifacts, the Museum Staff will conduct a complete biennial inventory of all artifacts of the Museum which is recorded and reconciled. Smaller or sectional inventories of the artifacts may be conducted by staff when the need arises. Neither the biennial inventory nor the sectional inventory is an “official” inventory of the County’s artifacts. Purchasing is responsible for conducting official inventories of the County’s artifacts.

- A. The inventory lists: a) the artifacts, b) the artifact’s identification number, and c) the location of the artifact.

- B. The reconciliation of the inventory, cross-checks the artifacts listed according to acquisition documents against the actual presence of the artifacts. Additionally, information may need to be updated due to circumstances:
 - 1. Artifacts were moved and the new location was not recorded.
 - 2. An artifact appears within the collection because it was not properly recorded or is in the process of being acquired.
 - 3. An artifact is missing (i.e. lost or stolen) from the collection.

- C. If there is a discrepancy in the sectional or biennial inventory of artifacts, such as an artifact is missing, Purchasing and Risk Management must be contacted immediately.

XI. INSURANCE

This portion is to clearly define Collin County Government's obligation to insure various acquisitions.

- A. All of the County's artifacts (except for Loaned Acquisitions) located on and off Collin County Government property are valued and reported to Risk Management annually.
 - 1. Artifacts initially registered as less than \$5,000 are reviewed annually by a Museum Staff who is classified as "qualified appraiser," and re appraised.
 - 2. Artifacts initially registered as worth \$5,000 or more are reviewed every 5 years by an external "qualified appraiser" who is [USPAP](#) (Uniform Standards of Professional Appraisal Practice) compliant.
 - i. Collin County Farm Museum budgets the appraisal schedule.
 - ii. New acquisitions appraisals documentation is provided by donors of the artifact.
 - 3. Using PastPerfect Museum Software, a "Value Report" of the County's artifacts is generated and exported to Excel.
 - 4. Using Excel, the columns for "Minimum Value" and "Maximum Value" of the County's artifacts are tallied. The median value between the two numbers is submitted to Risk Management to report to insurance providers.
 - 5. A copy of the value report of the County's artifact is also submitted to Risk Management.
- B. Loaned Acquisitions
 - 1. The lender is responsible for providing proof of insurance and maintaining said insurance on the loaned artifact.

XII. ACCESS & SECURITY

The Collin County Farm Museum maintains a secure environment to protect the collection of the County's artifacts; however every attempt is made to allow the public access to the County's artifacts not currently on display. The Museum Coordinator or a Staff representative is responsible for administering the fees in accordance with the established Collin County fee schedule.

1. The "Collections Area" in the Museum and the "Collections Room" are restricted access to those who have County access keys (Collin County Employees) and Museum volunteers.
2. The "Collections Units" in the "Collections Room" are restricted access to those who have an access key to the key lock-box in the Museum Office. The Collin County Farm Museum Staff and Myers Park & Event Center Manager retains these keys.
3. Individuals without key access, who desire access to the artifacts in those areas for purposes such as: auditing, inventory, tours, research, and/or assistance with collections activities – must be accompanied by an authorized individual who will remain with the visitor throughout the entire visit.

XIII. MUSEUM CLOSURE

In the event which the Collin County Commissioners' Court decides to close the Collin County Farm Museum the following procedures are followed:

A. Reasons for Museum Closure:

1. There is no professionally trained staff to manage the artifacts; therefore, the Museum is temporarily closed until a trained staff is able to manage it, and
2. The County Commissioners' Court authorizes the permanent closure of the Collin County Farm Museum and disposition of all of its artifacts.

B. Reasons for Temporary Closure

The overall goal of the Temporary Closing Procedures is to provide a more stable environment for the artifacts within the Museum and on the site of Myers Park & Event Center while there is no visitor traffic, professional care and management, and volunteer resource. The thorough cleaning of the interiors, the cotton sheet covers, and other aspects of the Temporary Closing Procedures will provide better preservation of the collections in the absence of active collections management. The closing procedures will mitigate the deterioration of artifacts; however, it does not eliminate the deterioration of the artifacts. Temporary Closing Procedures are best utilized for a maximum period of 3 years.

1. Thoroughly sweep and vacuum with the shop-vac. Vacuum all floors, window sills, corners, under objects, and all other places where dirt accumulates. Use the vacuum or broom to remove all spider webs from the interiors of the Museum.
2. Thoroughly vacuum and dust all objects and surfaces within the Museum. When dusting or cleaning surfaces (including furniture, display/storage cases, shelves, etc...), use cotton rags and wipe with distilled water or a mild solvent, such as Orvus.
3. Clear out all garbage and debris (such as perishable foods, paper trash, soda cans, etc...)that can be used as food or bedding for pests. Check refrigerator and drawers thoroughly. Any sponges, soap, matches, or other potential rodent food sources need to be removed. Also paper bags, candles, newspapers, and other materials that serve as nesting materials for rodents need to be removed.
4. All doormats and/or floor rugs need to be shaken outside and stored flat in the building.
5. All containers (cans, bottles, mugs, vases, etc...) which hold liquid need to be removed or drained.
6. Cover furniture, tools, and all other objects not in enclosed storage units with cotton or muslin sheets. Make sure the sheet covers do not touch the floor – this will prevent the sheet from soaking up moisture.
7. Take all framed artifacts off the exterior walls of the Museum.

8. When stacking artifacts, a layer of Ethafoam is used to prevent them from touching.
9. Ensure all fragile artifacts (such as books, textiles, leather, etc...) are enclosed in storage units and in temperature controlled facility.
10. Turn off all lights and close all doors and windows and cover with shades.
11. Remove all exterior panels and/or signs.
12. Lock and secure all storage units, rooms and buildings.
13. Steps 1 through 12 need to be repeated every 3 months for a maximum of 3 years.
14. If the Museum remains temporarily closed after 3 years, the conversion to the Permanent Closing Procedures should be considered.

C. Permanent Closure

The overall goal of the Permanent Closing Procedures is the disposition of the Collin County Farm Museum's collection of artifacts. This process is a two phase approach, which includes the Temporary Closing Procedures. The disposal strategies implemented may mitigate legal, social and ethical damage to Collin County; however, it does not eliminate the potential repercussions.

1. Implement or continue to implement the Temporary Closing Procedures.
2. Begin disposition process outlined in Section IX of this manual.