

# THE NEW MEXICO MILITARY MUSEUM

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*Collections Policies, Procedures, and  
Implementation Manual*



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## MISSION STATEMENT, PURPOSE, & GUIDELINES

### Mission Statement

The primary goal of the New Mexico Military Museum will be to discover, preserve, and disseminate knowledge about New Mexico's military history. This museum will seek to strengthen public understanding of how military conflicts have shaped the state of New Mexico as well as the national experience.

By documenting, preserving, and exhibiting the stories of war through our collections, we hope that we may begin a dialogue with the community about how wartime efforts have shaped the state of New Mexico and the world-at-large.

### Purpose

The purpose of this document establishes the policies, procedures, and modes of implementation for the successful preservation, care, and management of collections held by the New Mexico Military Museum (NMMM). The collection includes artifacts, documents/archival materials, photographs, artwork, vehicles, and other items maintained by the New Mexico Military Museum for study, exhibition, preservation and care, as well as other educational purposes intended to further the mission of the museum. Collections management may be loosely defined as the preservation, documentation, development, care, and use of said items via online and physical accessibility. This document is therefore a resource for proper and standardized utilization of the collections held in public trust at the New Mexico Military Museum by museum staff, volunteers/docents, and the general public.

### Guidelines

#### ETHICS

The New Mexico Military Museum (NMMM) recognizes and accepts the responsibility to provide proper management, preservation, and use of the collections. The staff of the New Mexico Military Museum is charged with legal, ethical, and professional obligations to maintain high levels of honesty, integrity, and loyalty to the NMMM and its collections. These standards of conduct are set forth in the [Staff Conduct Statement](#), to which all museum employees are required to adhere. All other standards of professional conduct and practices not enumerated in this document must be adhered to where practicable, so that museum staff members are operating within the spirit and letter of the law, as well as guidelines governing professional museum practices.

## ACCOUNTING FOR COLLECTIONS

The museum's collections are held and maintained for the purposes of exhibition, preservation, education, and research rather than individual or collective financial gain. Collections are protected and cared for. Sales resulting from deaccessioned items shall be used to acquire artifacts and/or archival material for the museum, or to meet the needs of conservation, treatment, or preventative care of existing collection items. Priority of obtained funds from the sale of deaccessioned items will be given to existing collections care. The museum does not treat its collections as monetary assets.

## EXCEPTIONS

Prudent exceptions to the Museum's established policies may be permitted in appropriate cases, where said exceptions are in the best interest of the museum. In all cases, exceptions must be approved according to the process enumerated here. The Museum Director shall report regularly to the assembled Museum Oversight Committee (MOC, pronounced "MOCK") on all exceptions to these policies, which have been duly authorized during the reporting period.

## COMPLIANCE

The Curator/Collections Manager shall report bi-annually, or as needed, to the Museum Director on the NMMM's ability to comply with the policies and procedures contained within the *Collections Policies, Procedures, and Implementation Manual*. He/She/They shall also be responsible for ensuring that the highest museum standards are being met, and that these policies are being observed and implemented by the staff and those associated with the NMMM. Furthermore, the Curator/Collections Manager shall also be responsible for revising the *Collections Policies, Procedures, and Implementation Manual* every three years, or with greater or lesser frequency as warranted, and for presenting said revisions to the Museum Director for approval by the assembled Museum Oversight Committee (MOC). The Curator/Collections Manager shall undertake the review process to correct any oversights in previous policy, as well as to account for any new circumstances that have arisen since the last review. Prior to the implementation of any revisions, both the Museum Director AND the assembled Museum Oversight Committee must approve revisions to museum policy and procedure.

## SCOPE OF COLLECTIONS & COLLECTING PLAN

### Introduction

Based on a cursory review, the collection of the New Mexico Military Museum is comprised of artifacts and archival material that covers New Mexico's military history,

New Mexico veterans, military vehicles, and veteran-based artworks. The current inclusive collection dates are unknown. Therefore, as part of the Museum's strategic plan, assessment of existing collections is necessary. Provenance is very important for museum collections. Therefore, all artifacts/archival records that the museum obtains must have its associated history and warranty of title. All items should seek to enhance the New Mexico Military Museum's mission statement.

### Scope

Currently, the scope of NMMM collections cannot be determined beyond broad generalizations. However, gaps in collections can be estimated based on military museum norms. See the New Mexico Military Museum's current strategic plan in dealing with "scope."

### Plan

The New Mexico Military Museum collects artifacts and archival material as it pertains to war-time efforts and the veteran experience in New Mexico. The museum preserves these collections for the benefit of present and future generations. The museum seeks objects, ordinary and extraordinary, whose stories and meanings are rich and complex, have inherent worth, both reflect and challenge the conventional wisdom, and invite us to look deeper or broader. These objects and their documented contexts illuminate and interpret the larger themes of New Mexico's military and war-time histories. Our collections form the foundation for research, scholarship, exhibition, public programs, and outreach.

### GENERAL STATEMENTS

1. The role of objects is to serve as a form of evidence of the past, along with documents and visual records.
2. Objects have many meanings. Over time, knowledge about the objects and their interpretations of the past will change.
3. The museum should be socially aware of contemporary issues and how to tastefully and ethically display, or choose not to display, certain items. Context is very important for museums – especially those with collections that may, or may not, go against societal trends. It is important that we be respectful, but also tactful, in displaying potentially controversial items.
4. The Museum's collecting goals will be guided by current themes for exhibitions and public programs. Collecting objectives will also be guided by the larger goal of a comprehensive historic collection. Long-range collecting goals and current themes may not always be in accord – nor need be.



## INTELLECTUAL PRINCIPLES FOR FUTURE COLLECTING

1. New Mexico Military Museum collections should reflect the breadth, depth, and complexity of the experiences of the people of New Mexico as it pertains to wartime histories. The museum actively seeks items to illuminate under-represented stories and groups (e.g. “gaps in collection”).
2. Only objects/collections that have their own stories (provenance), and which make clear larger stories – particularly those of local and regional characters – will be chosen.
3. The New Mexico Military Museum staff will continue to re-examine collections in response to new scholarship and changing interpretations.
4. The New Mexico Military Museum considers it of the utmost importance that we strive to conserve and preserve our object and archival collections to the best of our abilities and resources. However, as a smaller museum, our staff and financial resources are limited. As such, careful consideration shall be given towards objects that may stretch these resources. Objects that require extreme conservation, or are in a state of disrepair or neglect, will be weighed very carefully prior to acquisition. Only those objects, whose benefits to our mission (such as those of great cultural, artistic, or historical significance) outweigh the burden of their care, shall be considered for acquisition.
5. In acquiring objects, museum staff will pay as much attention to intellectual matters (relevance, context, significance, and provenance) as to procedures (shipping, registration, etc.).
6. Only objects that are deemed to be authentic shall be accessioned into the Museum’s permanent collection. Reproductions, duplicates, or forgeries will be added to the Educational or Exhibit Prop Collections<sup>1</sup>, or will not be accepted. Acceptance of these materials will be determined by available space, staff, and program needs.
7. In terms of cataloging, the intellectual content will be documented in an accessible manner. Research tools and documentary techniques (oral/video history, documents, photography, etc.) will be employed to provide context for the Museum’s acquisitions.
8. During the acquisition process, the Museum shall endeavor to garner as much supporting documentation as possible for the objects being considered. In order to support our mission, our goal is to learn the provenance, history, anecdotes, biographies, and any other factual (or mythical) information relating to our artifacts. The richer the documentation for an artifact, the more relevant it becomes to our collecting priorities.

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<sup>1</sup> The NMMM, currently, does not have an Educational or Prop collection. Until the majority of NMMM collections have been cataloged, we cannot plan to house additional “collections.”

9. The NMMM will adhere to both the letter and the spirit of accepted ethical standards and principles adopted by museums and other relevant professional organizations.

### COLLECTING PRIORITIES

The following priority areas shall be applied in order to determine what collections shall be actively sought, acquired, and accessioned. Collecting Priorities shall also be informed by the current institutional priorities that can be found in NMMM's Strategic plan.

1. Underrepresented groups: Navajo Code talkers, women in the military, Officers/Soldiers of color, etc.
2. \_\_\_\_\_: TBD after assessment of collections.
3. \_\_\_\_\_: TBD after assessment of collections.
4. \_\_\_\_\_: TBD after assessment of collections.
5. \_\_\_\_\_: TBD after assessment of collections.

### STAFF CONDUCT STATEMENT

#### Definition

The term "staff" is herein defined as referring to all individuals engaged or employed directly by the New Mexico Military Museum (NMMM), under the Department of Military Affairs, State of New Mexico, in conduct undertaken in the furtherance of its mission, as formally approved and adopted by the Museum Oversight Committee (MOC). Both volunteer, internship, and paid employees are to be considered staff, and all such individuals are thus obligated to conform to the Standards of Staff Conduct laid out herewith.

#### Mandate

Staff members are expected to understand and conform to all professional activities to the Museum's mandate, as outlined in the [Mission Statement](#). All programs, procedures, or goals outlined for the department, unit, or Museum must respect both the letter and spirit of the mission while promoting conduct in full accordance with it.

#### Background of Collections

This document is informed by the American Association of Museums' Code of Ethics for Museums, the International Council of Museums' Code of Professional Ethics, as well as the standards, policies, ethics, and professional practices adopted and endorsed by any and all organizations by which the Museum is accredited and/or otherwise affiliated, or is seeking affiliation and/or accreditation with. The

acquisition, preservation, care, use, etc. of its varied collections lies at the heart of the mission of the Museum and represents the foundation upon which its very existence depends. These collections serve as the essential intellectual basis for scholarship, education, and research among the Museum's public beneficiaries. Among the Museum's collections are invaluable examples of New Mexico's military history both pre and post statehood. The Museum's collections represent a diverse range of materials. The scope, depth, and quality of these items make it imperative to ensure that they are properly documented, preserved, stored, and made available to current and future generations.

## Principles

### ETHICS

The Museum recognizes that its continued success depends upon maintaining the confidence and trust of all those whom the Museum intends to serve. Therefore, the Museum requires of its staff adherence to the highest standards of ethical integrity, legal accountability, and thorough competence in professional training and experience. Such expectations of training and experience being appropriate to the level of responsibility and nature of employment within the museum. Staff will act with the highest standards of integrity by:

1. Discharging the public functions of the Museum responsibly and according to all relevant law in the applicable jurisdiction(s) in which museum operations take place, respecting international laws and treaties governing cultural properties and related materials, and by respecting and abiding (whenever practicable) by the provisions of all trust-enabling documents of the Museum.
2. Recognizing and abiding by the ethical standards governing the various professions with which museum operations bring it into contact.
3. Discharging duties on behalf of the Museum honestly and in good faith.
4. Making decisions impartially, based upon sound scholarship, while fully adhering to the mission of the Museum and acting (in all regards) in its best interests, and those of its beneficiaries.

### CARE

The Museum accepts the responsibility to provide overall management, including, but not limited to: storage, preservation, care, handling, exhibition, use of, and access to the collections, facilities, and supporting documentation in activities connected to the Museum, in accordance with the highest teachings of museum professional standards and best practices. In order to assure the accomplishment of such goals relating to the care of museum collections, staff will:

1. Ensure proper care and management of collections by following the established guidelines detailed in the *Collections Policies, Procedures, and Implementation Manual* and associated documents and directives, and by adhering to those professional practices.
2. Designate information integrity as a priority of the museum. Collections documentation, accession and disposal records, written communication, publication, exhibition, and electronic data and images (among other forms of information) shall be maintained responsibly and updated regularly. This information shall be made accessible to the public (when possible) in accordance with all legal standards in the applicable jurisdiction, and as is deemed appropriate by the Museum Director, or within the discretion of their appointees.

### COMPLIANCE

Staff members must be mindful of, and faithfully adhere to, the Museum's mission at all times, particularly when:

1. Making decisions regarding acquisitions, accessions, deaccessions, disposals, loans, etc.
2. Making decisions regarding exhibitions, endorsements, sponsorships, partnerships, marketing, etc.
3. Engaging in professional activities either on behalf of the Museum or directly related to its operations and/or intellectual sphere(s).
4. Disseminating knowledge and information about the Museum's collections.

### ACCOUNTABILITY

Senior staff members are expected to clarify the general policies outlined in this document to those personnel under their purview, via specific written directives of museum procedure. Lines of personal accountability and responsibility must be thereby fixed and understood by all staff.

### PURPOSE

The objective of this document is to establish a clear and concise set of ethical policies and related directives, as well as to specify the standard codes of conduct that apply to all staff and associated individuals, including (but not limited to):

1. All staff currently in the paid employ of the New Mexico Military Museum (NMMM).
2. The Museum Oversight Committee (MOC).

3. All co-op, part-time, volunteers, internship, and other less-than full-time unpaid individuals directly engaged in professional activities on behalf of the Museum.

These principles are intended to standardize NMMM operations as well as set the basis for collections care and to promote professional conduct within the Museum. This will provide the Museum collections with the greatest care possible. In addition, this will allow the Museum to protect the interest of our visitors, staff, and other associated parties.

## INTEREST

While actively engaged, assigned roles and responsibilities and/or duties, and/or while representing the Museum directly or indirectly, staff owe their primary professional and academic allegiance to the Museum. By entering into a contract of employment with the Museum, at any level, staff members are expected to act, at all times, in the best interests of the Museum. In particular, in instances where a conflict-of-interest is likely to occur between the Museum and the staff member, the best interests of the Museum must always take priority. Staff members are expected to make known any personal conflicts-of-interest to supervisory personnel, or the Museum Oversight Committee (MOC), as soon as they become aware of the conflict. They are to recuse themselves from any debate, discussion, or decision-making process related to said conflict-of-interest and to ameliorate this conflict by whatever means recommended and approved by the Museum Oversight Committee and/or senior supervisory personnel (e.g. Museum Director, panel of peers).

## *Personal Collecting*

In the interest of the Museum's mission, any private collections held by staff members or transactions related to the sphere of interpretation of the Museum conducted by staff members shall be made known to the Museum Oversight Committee, or supervisory personnel as procedure dictates. The existence of such collections and/or transactions must be disclosed when an individual first enters into association with the Museum, or upon implementation of this document. An inventory of the collection should be presented to the appropriate official, and be updated in a timely fashion as circumstances change. An individual may not act to build a larger or more comprehensive collection in areas that are enclosed by the Museum's sphere of intellectual interpretation. In cases where the item fits into the Museum's current list of collecting priorities, the Museum shall have first offer. Individuals associated with the Museum may not act in competition with the Museum in acquiring objects, and no staff member (including: unpaid individuals connected

in any fashion with the Museum, Museum Oversight Committee members, and relations of any staff personnel) will be permitted to purchase items deaccessioned from the collections of the Museum in any event. Staff members shall endeavor, in their personal collecting activities, to uphold the letter and spirit of local, national, and international laws, treaties, and agreements. More specifically, staff certify to strictly adhere to all applicable legislation governing issues of particular concern to museums; i.e. intellectual property rights, cultural property, repatriation, unlawfully expropriated archaeological or cultural items, and various regulations governing the disposition/handling of threatened and/or endangered species of flora and fauna, among others.

### *Profit*

1. Staff members are forbidden to profit from the sale of their services or collections while employed by the Museum in cases where their profit, or the public perception thereof, is deemed to be in conflict with the interests of the Museum.
2. Museum staff may volunteer professional services, teach, or participate with other organizations as long as the professional services, teaching curriculum, or organization does not negatively impact the Museum.
3. Dealing (buying or selling for a profit) in objects similar to those held in the Museum's trust is forbidden.
4. Museum staff should not evoke the name of the New Mexico Military Museum unless on business for and/or by the Museum. Using the Museum's name in order to promote or conduct private business is also prohibited.

### *Appraisals and Authentications*

Staff members shall not give appraisals to anyone outside the Museum and are absolutely forbidden to provide written or verbal appraisal values. Museum staff must never endorse a single appraiser or company. As it pertains to the authentication of objects at the request of third parties, Museum staff will strictly confine themselves to their areas of expertise. Furthermore, staff will, under no circumstances, take physical possession of an object from a third party for the purposes of authentication. All subsequent evaluations of collection items shall be carefully construed as opinions of intellectual interpretation, and all applicable limitations made readily known to the receiving party. As with appraisals, no written estimate of authenticity will be provided. Staff are permitted to share basic information on objects in the collections for the purpose of dissemination of knowledge, in full accordance with the policies and limitations enumerated herein

and elsewhere; in pursuance of the mandate of the Museum, while preserving all necessary constraints of confidentiality.

Exceptions of this policy is evaluation and valuation of objects for internal use only at time of acceptance/acquisition, at time of cataloging (if part of a back-logged collection and/or as deemed necessary), or as part of an annual inventory. These values shall be for the purpose of insurance if object/item is to be loaned to another institution for exhibition or research, or for the sale of an object/item during the deaccession process.

### *Gifts, Favors, Dispensations, etc.*

Staff members must never accept personal gifts or services of more than a negligible value or nature from commercial interests with whom the employee interacts on behalf of the Museum. Staff members should avoid any appearance of being influenced by commercial contacts or vendors; basing all decisions on behalf of the Museum upon the principles of sound scholarship, and the best interests of the Museum, its public, and beneficiaries.

### *General Behavior*

The Museum does not seek to proscribe limits upon the manner in which staff conduct their private affairs on their own time. However, Museum personnel must be aware that, as far as public perception is concerned, any Museum-related activity engaged in by personnel may not be wholly disassociated from a connection with the Museum, and may thus reflect upon its reputation and image. Staff shall, therefore, be expected to bear in mind the following:

1. Staff represent the Museum as an institution both in public and personal affairs, and should behave in a professional manner.
2. Extreme care should be taken to differentiate between actions or statements made as a representative of the Museum and those that represent the individual. Inappropriate conduct reflects upon the Museum and should be avoided at all times. Statements made to the public or press reflect upon the Museum, and should not be colored by personal biases; or, such personal biases should be clearly noted. Similarly, actions taken in the guise of the staff member's role within the Museum may be interpreted as actions taken by the Museum, and should always be carefully considered.
3. These terms and principles shall be deemed to apply to staff conduct even after said staff have left the employment of the Museum, so long as in the public perception the names and reputation of staff may reasonably be associated with the name and reputation of the Museum.



### *Outside Activities and Affiliations*

Activities that will further the Museum's mission are encouraged – provided that they fall within the proscribed standards of Staff Conduct, as well as any and all other relevant governing documents, policies, and procedures. Museum staff shall bear in mind the following guidelines relating to external professional engagements and affiliations:

1. Teaching or lecturing may be greatly beneficial to furthering the Museum's mission, visibility, and educational goals. However, if a staff member's personal profit threatens to outweigh the benefits of such activities, or if said staff member's conduct is found not to be in accordance with standards, the individual may become subject to examination and potential reprisal.
2. The Museum respects the codes of ethics that apply to members of our staff in relation to their roles as members of discipline-specific group. Museum standards of conduct are neither designed, nor intended to, impinge on those codes and standards. By contrast, they are designed to be complimentary. These principles are intended to unify the separate standards of various professional organizations for the benefit of the Museum specifically, and its public as a whole.
3. Staff will take all appropriate measures to ensure that information supplied to donors, affiliated organizations, government entities, members of the general public, etc. is, to the best of their professional knowledge and expertise, accurate, and relevant. Requests for information will be supplied as time, policy, and resources permit.
4. Staff members shall neither seek, nor accept, any paid or unpaid outside employment which may reasonably be construed to act to the detriment of their Museum duties and functions, or which interferes with the primary duty and loyalty to Museum interests.
5. If any staff member either is, or appears to be, acting on behalf of the Museum, relationships and correspondence between third parties shall be conducted in a manner of the utmost courtesy (both publicly and privately). Differences of opinion (professional or otherwise) shall never be expressed in a personalized fashion, and no member of the staff shall represent or engage in correspondence with any third party in an official format which is, or may reasonably be, associated with the Museum unless said correspondence is directly related to the Museum's mission and organizational objectives.
6. In the conduct of all affairs, both directly related to professional/intellectual interests of the Museum, and those of a strictly private or external enterprise, staff shall endeavor always to uphold the letter and spirit of all local, national,



and international laws, treaties, and agreements. More specifically, staff certify to strictly adhere to all applicable legislation governing issues of particular concern to museums (e.g. intellectual property rights, cultural property, repatriation, unlawfully expropriated archaeological or cultural items, and various regulations governing the disposition/handling of these items).

## Implementation

These policies are a general summary of conduct expected from staff members and other associated personnel (e.g. volunteers, interns, etc.) and should not be viewed as specific procedural instructions defining day-to-day operations.

The Museum Director shall be charged with enforcing the standards outlined within the Museum according to established procedure. At their discretion, a Conduct Review may be convened to evaluate any specific breach of appropriate conduct. The Curator/Collections Manager shall be held responsible for the re-evaluation of this document every three years, or with greater or lesser frequency as circumstances dictate.

All staff employees are responsible for adherence to these standards on a daily basis, and for their enforcement by staff members who are subordinate to them in the daily operations of the Museum. Only in certain cases (clarified by procedure and in full accordance with the provisions of this directive) should a Conduct Review be convened to evaluate a specific breach of staff conduct.

## Review

The Staff Code(s) of Conduct laid out here shall be reviewed and amended as necessary by the Curator/Collections Manager or other responsible staff member, at the discretion of the Museum Director, every three years (or with greater or lesser frequency as circumstances dictate). The resulting document shall then be reviewed for approval by the Museum Director and the assembled Museum Oversight Committee (MOC), and upon obtaining said approval shall be deemed to have taken governing effect upon Museum operations and subsequent staff conduct.

# ACQUISITION & ACCESSIONING OF COLLECTIONS

## Definition

For the purposes of this manual, acquisition is the process of obtaining legal title to an item with the intention of using it for museum purposes (e.g. preservation, exhibition, etc.). Accessioning is the act of formally including the item in the

permanent collection and recording it in the register of the permanent collection via hard copy and digital copy in tandem (via Proficio!Elements).

## Principles

The acquisition of collections is important to the Museum as part of its [Mission Statement](#). The Museum shall not actively collect items in abundance (rule of three), and shall not prioritize the acquisition of new items at the expense of existing collections. The Museum acquires collection items by a variety of methods. This can include gift, bequest, purchase, and exchange. The Museum requires responsible and disciplined acquisition of collections via a thorough adherence to the following principles:

1. Collected items must be relevant to the current mission and goals of the Museum.
2. There shall be periodic reviews of the Museum's collections, its scope, and of its collecting priorities.
3. There shall be a clear delegation of collecting authority.
4. Formalized collecting and acquisition criteria.
5. Strict adherence to professional ethics and law. Collections may be acquired only in accordance with established authority and only when consistent with applicable laws and professional ethics.
6. The museum follows the highest legal and ethical standards in the acquisition of collections. The museum shall exercise due diligence in the acquisition of collections via making reasonable inquiries into the provenance of items offered for donation or being sought for acquisition by other means. This is necessary before any official agreement/acceptance to determine viable legal title (warranty of title).
7. Items shall only be acquired and accessioned when there is a good faith intention to retain them in the collections for an indefinite period. The Museum is not a storage facility and therefore will not take in items to house as this would stretch staff time and resources. Museum collections are the priority.
8. The Museum does not take on conditional accessions. This means that the Museum will not take on a collection and/or object that is subject to specific rules, guidelines, or 'promise to display' caveats made by the donor. Once the collection and/or object is in the Museum's custody, the Museum becomes the sole owner.
9. Consultation with the appropriate authority shall be sought before an acquisition of any kind that would require a substantial tax on resources.

## Policy & Procedure

### COLLECTIONS ACQUISITIONS

Objects and/or archival material will be accepted or otherwise acquired for the New Mexico Military Museum via the acquisition principles listed above, but also under the following conditions:

1. Objects and/or archival collections must be relevant and consistent with the New Mexico Military Museum's [Mission Statement](#).
2. Authority to evaluate and approve a potential acquisition/accession shall be entrusted to the Curator/Collections Manager and/or the Museum Director (as appropriate).
3. Accessioned objects/collections shall have permanence in the collection so long as they retain their physical integrity, identity, authenticity, and usefulness to the Museum.
4. The Museum will not take in items that require immediate conservation/restoration. While the Museum will endeavor to provide proper storage, handling, and preservation practices to collections, the Museum is beholden to current staff and funds available for preservation practices. The Museum will not take in items that over-exert our current resources.
5. The Curator/Collections Manager and/or Museum Director should be selective in accepting items for donation. Each piece has an initial and on-going expense to the Museum and therefore items should only be taken if they fill a need in our collecting goals/priorities.
6. The Museum does not/shall not promise exhibition of items taken. Oftentimes, objects/archival collections will be accepted for their historical value, uniqueness, and/or ethical need to preserve specific items.

### TEMPORARY CUSTODY RECEIPTS

In the context of donations, [Temporary Custody Receipts](#) should be drawn up in order to take temporary physical control of the item(s) for evaluation and consideration into the collection. Temporary Custody Receipts will include purpose (e.g. donation), contact information, as well as any information of the item(s). This receipt will help to inform the Curator/Collections Manager when entering the information into the accession and catalog record. This document will also be kept as part of the accession's permanent record – if donation is accepted into the collection. If item/items are not taken into the collection, a receipt of return shall be completed.

## Implementation

### PROVENANCE & WARRANTY OF TITLE

Prior to accessioning an object and/or collection, the donor must provide reasonable proof that he/she/they can and will convey clear legal title.

1. Museum staff should have reasonable assurance that the offered item(s) has not be exported from its country of origin in violation of that country's law, the ethical guidelines defined by the United Nations Treaty of 1972, or in violation of federal or state antiquity laws.
2. Title of all objects accessioned should be obtained free and clear without restrictions, limitations, and/or conditions. Upon agreement and signature(s) between the donor and the Museum, the Museum gains ownership of the item(s) and will use said items to further the Museum mission.
3. If the use of the object is restricted or encumbered via intellectual property or by its nature, acceptance of the object must be approved by the assembled Museum Oversight Committee. Documentation to this effect will state in writing why said object is accepted and will be made part of the object's accession file as it is done with all accepted donations during the accession process.

### CONSEQUENCES OF DONATION

Due to the Museum's status as a government entity, donations to the Museum are tax deductible (to the extent provided by law) as charitable contributions for the value of the property as determined by an appraisal, receipt, or other valid documentation, minus the value of any goods or services received by the donor in exchange for the gift.

1. The responsibility of providing an appraisal for donated items lies with the donor and must be conducted and concluded prior to donation. Museum staff, under no circumstances, will appraise donations for donors. This is an ethical issue and represents a clear conflict-of-interest on the part of the Museum – while at the same time interposing the Museum between the donor and the mandates of the Internal Revenue Services (IRS).
2. Under no circumstances shall Museum staff, associated persons, volunteer, etc., appraise items for the public nor those offered for donation. Museum staff members cannot suggest nor vouch for a single appraiser. Instead, all queries for appraisals shall be referred to relevant societies, associations, foundations, etc., so they may find a qualified appraiser (see U.S. Tax Reform Act of 1984 and IRS regulations relating to the Act for further clarification).

3. Donors should consult IRS Publication 561: "Valuation of Donated Property" and Publication 526: "Income Tax Deduction for Contributions" and/or contact their own tax specialist.

### DOCUMENTATION

Each accession should have its own separate file arranged by accession number (e.g. 1997.34, 2002.1, 2020.14, etc.) and in chronological order (which should be inherent). These files shall contain all documents associated with the official donation. This includes, but is not limited to, temporary custody agreements, correspondence (if applicable), provenance, past conservation/restorative work (if applicable), LF histories associated with re-housing, history on the items/collection (provenance, past exhibits, etc.), signed [Deed of Gift](#), as well as future deaccession and/or repatriation documentation. These documents shall never be destroyed or purged. Maintenance and care of these files falls under the supervision of the Curator/Collections Manager.

1. Acquisitions for the collection shall be promptly accessioned upon receipt of the item following, and under a "Temporary Custody Agreement" between the Museum and the donor – overseen, primarily, by the Curator/Collections Manager.
2. Items/Collections that have been accessioned shall be registered in a handwritten Accession Ledger, maintained by the Curator/Collections Manager. As each donation is recorded, a copy of the "Accession Record" and signed "Deed of Gift" derived from the Museum's collections management software (in this case, Proficio!Elements) shall be printed and placed in the accession file. All accession books are to be kept separate from regular file holdings.
  - a. Original scans and images taken during the cataloging process should be organized by accession number and accession year digitally on the SHARE drive or on an external drive to be updated/backed-up monthly.
3. A unique number shall be assigned to each donation as well as to each object within each donation to the museum's collections. These numbers will be used for collections recordkeeping and tracking purposes.
4. The number system will be a variation of the tripartite systems commonly used in American museums – numeric only. The first part of each collection item number shall consist of the four numbers corresponding to the year in which the donation was made (e.g. 1992). The second part of the number, separated by a period, will be the group of items chronologically taken during that year (e.g. the tenth group/collection taken in 1992 will show up as 1992.10), the third segment of this three-part number system will be the unique object identifier – as part of a group. For example, 1992.10.15 will be

an object's unique identifier as the 15<sup>th</sup> recorded object within the accessioned group of 1992.10. Collectively, this number is known as the "accession number" (i.e. the catalog number) and will be used as the basis for the maintenance of collections records.

5. Once the decision to accession has been made, a "Deed of Gift" shall be pulled from the collections software (Proficio!Elements), edited where necessary, and sent to the donor along with a template "[Thank You Letter](#)." Said "Thank You Letter" will also include the accession number for the donor's personal records. The donor shall sign and return the "Deed of Gift." Official accession of the item(s) into the system via cataloging is to be completed first in order for the "Deed of Gift" to accurately auto-populate. The "Deed of Gift" must have the accession number, as well as a list of objects donated, before being sent to the donor.
6. A Deed of Gift must be executed for all accessioned collections. This form must be signed and dated by the donor as well as countersigned/dated by the Curator/Collections Manager and/or the Museum Director in order to effect a legal transfer of ownership. The donation should be listed in sufficient detail to accurately identify each individual item – to be auto-populated via the Proficio!Elements software following accurate accession and object cataloging. The fully executed Deed of Gift then becomes part of the permanent accession file and represents the Museum's legal/warranty of title to the donated object(s).
7. Once the Deed of Gift is fully executed, a copy of the Accession Record shall be placed in the accession file – illustrating date of accession, name of donor (unless anonymous), and a complete listing of the donation – including each object's assigned accession/catalog number.
8. Auto-populated forms via Proficio!Elements will list the accession number as well as associated objects numbers and will be placed in their own folders listed the accession numbers. Detailed accounts of objects (conservation work, exhibit use, etc.,) may require object-specific folders within accession files (depends on room, materials, need, etc.).
9. All accessioned collections and their associated objects are to be entered into the collections management system Proficio!Elements. Staff members should bear in mind that the "Source" information equates to donor and in order to add a new "Source" one must add them to the Authority Table.
10. Each accessioned object shall then be prepared and housed in the appropriate acid-free materials, numbered, tagged, and placed in the appropriate storage location. A brief condition report is to be completed and added to the digital

file as well as the hard-copy accession file so the items' incoming condition can be accounted for in future inventories.

11. When possible, do not mark the objects – instead, utilize acid-free tags, cotton twine, and non-toxic marking materials such as pencils or Identipens (for example: items with handles, places where tags can be tied/affixed). When tags cannot be affixed, mark the items using a barrier layer of clear B-72 and non-toxic marking implements (e.g. Identipens). Make sure the item is marked in an area which will not be shown (dramatically or otherwise) when on display. Always use gloves. Only in special circumstances will gloves be disregarded. If additional PPE is desired, or needed, submit a request for purchase.
12. Books and archival materials are to be marked with pencil and/or placed within acid-free folders with their accession number, series, sub-series, etc. Archival collections do not follow the same standard for numbers that objects do. Instead, archival collections use a two part system (e.g. 2002.22) and have series, sub-series, folder nos., etc. Follow regular archival processing, arrangement, and description practices when handling archival collections.
13. All paper, photographs, prints, and other “archival” material that does not fall within an all-encompassing “archival collection” should be housed within an acid-free folder or Mylar.

## PHOTOGRAPHY

1. During the accessioning and cataloging process, and if proper equipment is available, objects shall be digitally photographed. Said images shall feature the following information: accession number/catalog no., measurement scale, and color scale. The image shall then be attached to the digital catalog record in Proficio!Elements thereby becoming part of the object record. This same policy shall apply to loaned materials and exhibits as well. The original image shall be placed on the museum/DMA server under cleanly organized and cataloged folders and subfolders (e.g. by year and by accession).
2. The use of any type of camera within the museum is restricted – no flash and patron should ask permission of guide on duty. Publication of photos taken of/in museum and of museum objects or exhibits is prohibited without the proper consent of the Museum Director or the Curator/Collections Manager.
3. Rights and Reproduction requests of archival documents, artifacts, or other museum items may be requested and fulfilled by the Curator/Collections Manager and approved by the Museum Director.



## Review & Follow Up

All Museum staff, volunteers, interns, and associated personnel shall strictly adhere to all applicable guidelines and procedures for acquisition and accessioning as specified here in the *Collections Policies, Procedures, and Implementation Manual*.

The Curator/Collections Manager will report annually, or as needed/requested, to the Museum Director regarding incoming collections, their status, as well as post-dated accessions/cataloging. Written reports shall be submitted at least one month prior to the end of the fiscal year. This report shall include number of accessions, items, LF, and a count of digital records (images, scans, etc.).

The Director shall report to the Museum Oversight Committee on incoming accessions annually or earlier as needed with the understanding that the Curator/Collections Manager will need to compile the necessary information.

## DEACCESSIONING OF COLLECTIONS & DISPOSAL

### Definition

Deaccessioning is the process by which collections/items are formally removed from the Museum's collection.

### Principles

The deaccessioning and disposal of collections is fundamental to the work of the Museum, in that it permits for a considered and constant re-evaluation of the Museum's collecting efforts in the light of resources, changing audiences, mission-shifting, etc., The Museum disposes of collection items by a variety of means including: donation, transfer, exchange, sale, repatriation, and destruction. The Museum requires responsible, ethical, and disciplined deaccessioning approaches and adherence to the following:

1. Generally, collections are acquired for the Museum only when there is a good faith intention to retain the material indefinitely. Collections are held as long as they continue to serve the goals and mission of the Museum and can be properly maintained and used.
2. Deaccessioning and disposal are a legitimate part of responsible collections management practice. Prudent collections management includes judicious consideration of appropriate deaccessioning and disposal. The periodic review, evaluation, deaccessioning, and disposal of existing collections are intended to refine and improve the quality and relevance of the collection with respect to the Museum's current mission.



3. Deaccessioning and disposal can occur for a variety of reasons such as deterioration, damage (where cost would overcome “value”), duplication or redundancy, insufficient relationship to mission statement/collecting goals, and repatriation.
4. Collections/Items may be deaccessioned and disposed of in accordance with established authority and only when consistent with applicable law and professional ethics. All applicable federal, state, local, and international laws, treaties, and regulations and any other applicable restrictions will be observed. All actions, pertaining to the deaccessioning and disposal process, shall be documented.
5. Proceeds from the disposal of deaccessioned collections must be designated to either further acquire collections, or by meeting current collections care needs.

## Policy & Procedure

### COLLECTIONS DEACCESSIONS

No accessioned object or collection shall be removed from the Museum’s register and physically disposed of except by strict conformity to the following rules:

1. The authority to propose a potential deaccession shall be vested in the Curator/Collections Manager and/or the Museum Director. As the staff member most directly responsible for the management of collections, the process shall be initiated by the Collections Manager/Curator. When the Curator/Collections Manager and Museum Director deem it advisable to deaccession any object or collection owned by the Museum, and the proposed deaccession is duplicative, superfluous, deteriorated, incompatible with mission, or otherwise deemed to be disposable, the Collections Manager/Curator shall prepare for the Museum Director and Museum Oversight Committee, a deaccession recommendation.
2. No donated object shall be deaccessioned within three (3) years of the date of its acquisition – unless new information becomes known which would have influenced initial acceptance.
3. While the Deed of Gift ostensibly gives the Museum ownership and clear title, as a matter of courtesy to the donor or their heirs, the Museum will endeavor to notify the “family” of the intent to deaccession. Further to this effect, the Museum will exercise a reasonable effort to determine the last known address of the donor.
4. If, after contacting the family/heirs/donor, 90 days has elapsed, the Museum will be able to deaccession in good conscience to other sources or means of disposal.

### *Deaccession Documentation*

1. Once an item is proposed for deaccession by the Curator/Collections Manager and/or Museum Director, an official deaccession proposal shall be prepared by the Curator/Collections Manager for submission to the Museum Director and, eventually, the Museum Oversight Committee for signature and approval.
  - a. A deaccession memo shall list a brief description of the items proposed for deaccession, the accession number, the reason for deaccession, suggested disposal method (destruction, transfer, or sale), and an estimated value of the said objects.
  - b. Depending on disposal method (transfer or sale), a letter shall be produced that conveys the reasons for the deaccession and shall specify transfer/sale to the appropriate party or institution. Two copies shall be produced – one for the deaccession file and one for the third party. Both parties will sign, date, and countersign their individual/original copies.
2. After an item is no longer, physically, in the care of the Museum it shall be recorded two ways:
  - a. Using the Museum's collections management software, the catalog record shall be labeled as deaccessioned via the object status bar. Choose the deaccession selection that is most accurate based on disposal, transfer, etc.
  - b. The collection, objects, items, etc., shall be marked and stricken as a deaccession in red, orange, pink, etc., pen (a noticeable color other than black or blue for high visibility – no highlighter). While stricken through, the information should still be legible.

### **DISPOSITION OF DEACCESSIONED OBJECTS AND/OR ARCHIVAL MATERIAL**

There are various methods for the disposition of deaccessioned items such as sale, disposal, transfer, etc. The Museum shall take into consideration that:

1. The manner of disposition is in the best interests of the public via avenues such as scholarly or cultural communities – or that which the Museum serves.
2. The Museum shall attempt to place the deaccessioned items, save for those meant for disposal (see below), in other institutions that complement the Museum's current, or past, mission statement(s).
3. Consideration will be given to selling the items only if the funds obtained go towards collections care.

4. Deaccessioned items may never be given away or sold privately to anyone associated with the work of the Museum (e.g. Museum employees, Board Members, Committee Members, Volunteers, Interns, etc.) or any party representing these individuals/groups – including family members.
5. Deaccessioned items shall be donated to community-serving second-hand stores if the item is in good condition, could be re-used, and has been turned down by other institutions, and the cost associated with the time/effort to sell the item to a third party exceeds value.
6. Deaccessioned items shall be thrown away, only, when the following are applicable:
  - a. The cost to repair/conservate the items due to water damage, mold, etc., is greater than estimated value.
  - b. If the object is damaged and the cost to repair/conservate is greater than the estimated value.
  - c. If the object was offered to other institutions with no interest and item cannot be given to second-hand store.

### *Restrictions/Addendums on Deaccessioning & Disposition*

Before deaccessioning an item from the Museum's collection, Museum staff should make reasonable effort to ascertain that the Museum has warranty of title and is free to deaccession the item from their collection.

1. Items can not be deaccessioned if their lifespan within the collection is less than three years unless:
  - a. Item did not follow accessioning policy upon reception and therefore has issues with warranty of title, legality, and/or ethics.
  - b. Item is requested to be repatriated by outside source.
  - c. New information becomes available that either discredits the donor or item, or would have negatively influenced the Museum's initial decision to take the item.
2. Weaponry that requires special permits/licensure are a special case and deaccessioning and disposition of these items will follow local state and federal laws.
3. Items that potentially fall under "items of cultural significance" should be treated as items to be, potentially, repatriated and all effort shall go towards deaccessioning and reuniting the item with the proper group, authority, family member, etc.

## Review & Follow Up

Museum staff, which includes volunteers, interns, partnership-board members, committee members, etc., will strictly adhere to all applicable guidelines and procedures for deaccessioning and disposal found within this document – *Collections Policies, Procedures, and Implementation Manual*.

The Curator/Collections Manager will produce an annual report detailing fiscal year deaccessions and disposal methods; Museum Director will approve/verify and report; the Oversight Committee will be apprised of these steps, actions, etc. annually.

## LOANS

### Definition

Museum loans consist of a temporary transfer of custody from an individual or institution to a museum, or similar institution, for the purpose of education, exhibit, or study. Both parties enter into a contract which can include a specified time, purpose, exhibition parameters, and so on. Each lending institution will have its own requirements. However, similar information and agreements will always exist.

### Principles

The “loaning” process is a fundamental part of the educational mission of any collecting institution. It not only helps to, temporarily, expand one’s collection to educate the public but also promotes other institutions. Due to the high standard of care expected for collections loaned/borrowed, the NMMM requires responsible and disciplined practice.

1. A museum’s fundamental mission is to disseminate knowledge through museum education via programming and exhibits. The exchange of collections with other institutions and entities for public exhibits, study, and education seeks to uphold this objective.
2. The Museum will adhere to the guidelines set forth by the lending institution.
3. An item may only be lent or borrowed in accordance with established authority and only when consistent with applicable law and professional ethics – including proper documentation.
4. Collections will only be lent for the purpose of public exhibition or study.
5. Museum collections will only be lent for limited, and clearly defined, purposes and never for private financial gain.

- a. All loans (incoming and outgoing) are to run for a specified time, with an option for renewal/extension. However, indefinite or permanent loans are discouraged.
  - b. Costs associated with proper care, handling, and shipping of a lent item may be charged to the borrowing institution/organization.
6. Collections both loaned by the Museum and on loan to the Museum will be insured as specified by the loan agreement.
7. All loans to or from the Museum must adhere to all applicable federal, state, local, and international laws as well as international treaties, regulations, and ethics.
8. The Museum will not make it a habit to charge loan fees, but reserves the option to charge loan fees as well as expenses associated with the loan process.
9. The Museum will not make it a habit to pay for incoming loans.
  - a. Costs associated with proper care, handling, and shipping of any borrowed item is acceptable with prior approval by the Museum Oversight Committee and funded through State Purchasing, the New Mexico Military Museum Foundation, Local/State Armory Board funds, etc.
10. The Museum retains financial responsibility for the continued oversight of its collections, regardless of length and type of loan.
  - a. The Curator/Collections Manager is responsible for keeping loan documents (incoming and outgoing) up to date which includes, but is not limited to: condition reports, loan extensions, and all associated documentation and correspondence between lender and borrower.

## Policy & Procedure

### OUTGOING LOANS

Outgoing loans will be made to organizations that will benefit from the item(s) in question. Primarily, we will be loaning items to other collecting institutions, historical centers, universities, art galleries, etc., for the purpose of exhibition/study. Outgoing loans require adequate documentation, security, environmental, and narrative – to ensure that items we loan are being utilized in concert our mission statement not against it.

1. The authority to approve or deny outgoing loans from the collection lies with the Curator/Collections Manager and/or the Museum Director – depending upon circumstance.
2. The Curator/Collections Manager shall be charged with the responsibility in determining if the object's condition prohibits/restricts the loan in any way,

determines loan restrictions, as well as determines if the borrower meets base-line/standard eligibility requirements such as security, environmental conditions, and use.

3. Loan should only be made out to other like-minded institutions: collecting institutions, historical centers, universities, galleries, etc. Outgoing loans to individuals is not recommend, but may be allowed for research/study purposes if the borrower can meet certain requirements such as security, insurance, etc., and does not exceed six (6) months.
4. Initial outgoing loans will not exceed one (1) year, with the understanding that loans may be renewed following a fully submitted condition report and final installation images.
5. The lending museum reserves the right to specify the type of carrier and method of shipment to be utilized during the conduct of the loan.

### *Documenting Outgoing Loans*

The responsibility for documenting, monitoring, and maintaining outgoing loan files falls to the Curator/Collections Manager.

1. Prior to the completion of the loan agreement, the Curator/Collections Manager and/or Museum Director may request various documents such as a General Facility Report (which includes information on security and environmental) or Certificate of Insurance for the item(s) to be borrowed/lent. If the borrower cannot meet the requirements set in the initial stages of the loan process, the Museum may halt relations at their discretion until such a time that the borrower can meet the requirements requested.
2. While both institutions may choose to implement their own loan agreements, the terms and conditions of the lender's documentation shall always take precedent.
3. Items loaned from the New Mexico Military Museum's collection shall be credited when used for exhibition and/or publication purposes. It is the responsibility of the Curator/Collections Manager to provide the borrowing institution and adequate credit line and invoke Title 17.
  - a. At minimum, the credit line should contain the phrase "On loan from the New Mexico Military Museum," or similar verbiage.
  - b. At maximum, the credit line should include the object number, collection name, New Mexico Military Museum, as well as additional credit lines as dictated by the donor source (i.e. "In memory of...")
  - c. For publication, a [full credit source](#) shall be given and included in the digital file.

4. Once an agreement has been made regarding the use, exhibition, etc., of NMMM objects, and all applicable documentation has been received from the borrower (e.g. environmental, security, use, etc.) an [Outgoing Loan](#) form will be created using the museum's collections management software (Proficio!Elements).
  - a. Once the Outgoing Loan document has been created to include all applicable information, restrictions, use, credit, etc., both parties will sign the document.
    - i. The document can be signed by either the Curator/Collections Manager or the Museum Director – same goes for the borrowing institution and/or whomever is responsible for incoming/outgoing loan per their policy.
  - b. The New Mexico Military Museum shall retain the original copy of the signed and countersigned loan agreement. If the borrowing institution would also like an original document, two loan documents will be printed from the system.
  - c. The signed document, pertinent correspondence regarding exhibition use, as well as other required documentation will be placed in its own loan file.
    - i. Loan Files should be clearly marked and away from Accession Records.
    - ii. Loan Records will follow the same tripartite system that accessioned collections do with one caveat. "L" will be placed in front of the number to signify its "loan" status (e.g. L1992.04 – which will be the fourth (4<sup>th</sup>) loan in the year 1992).
5. Is it the responsibility of the Curator/Collections Manager to oversee the condition of our works while in the care of another institution. This could include requesting condition reports (annually), site visits, status updates and photos from museum staff, etc.
6. Upon return of the loaned item/items, the Curator/Collections Manager will evaluate the item to ensure that all conditions were met and that proper care was utilized in exhibiting/studying the object(s). If no problems are found, the Curator/Collections Manager will close out the loan. The original loan document(s) shall be produced and signed by both parties of "receipt" of the items back into NMMM custody.

## INCOMING LOANS

There are numerous reasons for incoming loans: partnership exhibitions/projects, filling gaps in the museum's collection, study, etc. It is at the discretion of the



Curator/Collections Manager and/or the Museum Director to borrow objects from other institutions/individuals.

1. The authority for approving incoming loans shall be vested in the Curator/Collections Manager and/or the Museum Director.
2. If restrictions are placed upon a proposed loan, by the lender, acceptance and ability to see to said restrictions shall be the responsibility of the Curator/Collections Manager.
3. No objects shall be borrowed/accepted by any staff member, volunteer, intern, or individual associated with the Museum if the object seems to have questionable provenance, authenticity, warranty of title, etc.
4. It should be noted here that the museum will not make it practice to accept loaned items that are in need of conservation work, nor items that are fragile (fragile enough to be damaged in careful transit). That being said, the Curator/Collections Manager and/or Museum Director may work with the lender to ensure that no fault be brought upon the NMMM museum due to its incoming condition and associated risks in displaying the object.

### *Documenting Incoming Loans*

The Curator/Collections Manager shall maintain all records deemed necessary and prudent for the documentation of incoming collections loans, and will be responsible for monitoring said loaned objects. This can include, but is by no means limited to: incoming condition reports, insurance documentation (from one or both parties – determined by lender requirements), correspondence regarding the loan, incoming receipts, loan agreements, conditions of use, and so on.

1. The Curator/Collections Manager is tasked with the responsibility of providing various records that may be required by the lender such as: insurance documentation, general facility reporting, specific environmental data of area(s) in which the artifact will be showcased, condition reports, narrative of use, etc.
2. While both institutions will have their own Incoming/Outgoing Loan Agreement(s), terms and conditions shall always default to the lending institution or individual. In such cases where the lender is an individual or university (where no policies/agreements exist), the Curator/Collections Manager will utilize the borrowing institution's (NMMM) format, policy, and practice – to include Temporary Custody Receipts, Incoming Loan Agreements (including, but not limited to: cataloging and condition reporting via collections database).
3. Unless specifically released, in writing, by the accountable staff member of the lending institution, objects borrowed from the collections of another



institution for the purposes of exhibition or publication, in any format, must be credited to the lender. It shall be the responsibility of the Curator/Collections to adhere to the provided credit line specified by the lending institution.

4. In tandem, or following the receipt of the lending institution's Outgoing Loan Agreement, and depending on the circumstances, the Curator/Collections Manager will draw an NMMM's [Incoming Loan Agreement](#) – utilizing the Museum's collections database. NMMM's Incoming Loan documentation shall list the loan number (e.g. L2005.12) and catalog the borrowed item(s) – photographs and locations, finalized or temporary, will be listed with the item. An incoming condition report – usually requested by the lender – will also be produced via the collections management software. Upon completion of the digital record, hard copies will be made (signed and counter-signed) and kept within museum loan files – these records are to remain in perpetuity.
5. After the completion of the specified loan period, agreement, purpose, etc., the Curator/Collections manager will be responsible for evaluating the condition of the borrowed materials – however, loan agreements via the lender may specify inventories and/or condition reporting prior to loan end.
6. Once the loan period has reached its conclusion, the Curator/Collections Manager is responsible for closing out the agreement – both digitally, and with the lending institution. Additional measures may include appropriately packing and shipping the items(s) back to the lender and/or to the next, agreed upon, venue (as dictated by the loan) – tracking documentation and receipts shall be shared with the lending institution.

### TEMPORARY CUSTODY RECEIPTS

In the context of Incoming Loans, Temporary Custody Receipts may be utilized in order to start the process. These forms include the name of the lender, a description of the artifact, the date, and purpose – “for exhibition” in this case. These forms can be used to inform the Incoming Loan documentation. These forms show proof that the NMMM has taken physical custody, temporarily, until finalized documentation via Proficio!Elements (or applicable software) can be drawn up.

### Review & Follow Up

Appropriate museum staff (e.g. Curator/Collections Manager and/or Museum Director) will strictly adhere to all applicable guidelines, processes, and procedures for documenting any museum loan (Incoming/Outgoing) as described by this *Collections Policies, Procedures, and Implementation Manual*.

These policies and procedures regarding NMMM loan activities shall be executed through the provisions and delegations of authority enumerated here. Application of the “Guidelines for Exhibiting Borrowed Objects,” as issued by the American Association of Museums (AAM) should also be employed to the best of NMMM’s ability. All Museum staff, volunteers, interns, etc., shall adhere rigorously to all approved and implemented loan policies and procedures – as set forth by the lending institution (default) or the NMMM if necessary.

## CARE OF COLLECTIONS

The New Mexico Military Museum (NMMM) is not in possession of a conservation lab. Therefore, the NMMM will take on a preventative conservation and preservation approach – as inherent in collecting institutions and practicing proper collections care.

### Definition

Preventive Conservation and Preservation is the mitigation of deterioration and damage to cultural property through the formulation and implementation of policies and procedures for the following: appropriate environmental conditions; handling and maintenance procedures for storage, exhibition, packing, transport, and use; as well as utilization of care and appropriate materials (e.g. mylar, acid-free tissue, buffered/un-buffered materials, etc.).

### Principles

Preventative conservation and care of collections is an essential function of the ongoing work of any museum. Ethically speaking, a museum has a responsibility to care for its collections and therefore a high standard of “due care” should be given. The NMMM requires responsible and disciplined handling, storage, and display of collections via a rigorous adherence to the following principles:

1. The NMMM has a professional and ethical responsibility to preserve and protect the collections that it holds in public trust.
2. Preventative conservation and preservation is a critical and integral component of profession collections management and ensures that the collections are available for future use, study, exhibition, etc.
3. The NMMM’s ability to carry out its mission is directly related to its ability and willingness to preserve its collections and their inherent information. While deterioration is inevitable for physical materials, the Museum strives to control the physical, chemical, and biological factors that can result in deterioration of collections.

4. The Museum must also preserve collection records and any other documentary materials that support the use and preservation of NMMM collections.
5. The Museum and its staff – primarily the Curator/Collections Manager – shall be responsible for developing and implementing preservation strategies and policies that respect the varied nature of NMMM collections – while providing access to those collections (e.g. digitally, upon request/appointment, via exhibition, etc.).
6. The Curator/Collections Manager shall develop technical standards for preventative conservation of collections. This shall be done in accordance with the mission of the NMMM as well as for the purposes of the needs of the collection (present and future).
7. Scope, significance, and quality of the NMMM's collection make it important that current research and education use of its collections are balanced with the need to preserve.
8. The Museum shall provide the necessary preservation, protection, and security for all collections acquired, borrowed, and already in custody of the museum which includes their associated information and documentation.
9. The Museum should balance current research and educational use with the preservation requirements in order to ensure that NMMM collections are available for future use and, therefore, serve their intended purpose.
10. Any conservation intervention, restoration, destructive sampling, or consumptive use of collection items must be authorized by the appropriate staff member (i.e. Curator/Collections Manager), documented, and justified for the purposes of preservation or professional scholarship.
11. At all times, Museum and volunteer staff shall be aware of their responsibility to preserve and protect NMMM collections, and shall act accordingly.
12. The Curator/Collections Manager shall be responsible for the following duties including, but not limited to: collections database management, accessioning, cataloging, photography, re-housing, condition reporting, inventory, packing and shipment of collections, etc., with authority to designate to appropriate subordinate staff (i.e. Collections Assistant, trained intern/volunteer, etc.).

## Policy & Procedure

Responsibility for the condition of objects in NMMM's care, both in storage and on exhibit shall be vested in the Curator/Collections Manager, with the authority for monitoring and evaluating preventative conservation measures and the overall condition of collections delegated to subordinate staff at their discretion.

1. Preservation practices, standards, and procedures should align with the mission of the NMMM and the nature, purpose, and use of the collection.
2. Strong collections management practices are essential to ensure that the collections, and associated data, are cared for and maintained in conditions that preserve and extend their physical and intellectual integrity.
3. Collections activities shall be predicated upon a concerted preventative conservation program, which advocates minimal intervention, maintaining desirable environmental conditions for preservation, handling only by trained personnel and under strict guidelines, use of proper materials (e.g. inert, acid-free, etc.) for storage, packing, and exhibition of collections material, and reversibility of conservation treatments.
4. Physical aspects of the facility affecting the ambient environmental conditions of the collection (i.e. light, temperature (T), relative humidity (RH), infestation, mold, and air pollutants) shall be monitored weekly by the Curator/Collections Manager (and/or their designee), and is to be adjusted accordingly to meet preservation standards.
  - a. See [Risk Management & Security: Collections Care](#).
5. The Curator/Collections Manager shall prepare a written condition report (complete with photographic documentation) for objects when they are first accessioned into the collection or obtained as part of a loan agreement in order to produce a baseline record from which the condition can be monitored.
6. The Curator/Collections Manager (or their staff designee) shall make weekly inspections of objects on exhibit and in storage areas. Changes in the ambient environment or in conditions that affect objects in the Museum's collections or on loan to the Museum must immediately be brought to the attention of the Curator/Collections Manager and/or Museum Director who shall collaboratively take the necessary actions to rectify the situation.
7. Damage to, or change in, condition of an item (owned or borrowed) must be reported immediately to the Curator/Collections Manager who will notify the appropriate staff members, the Museum Director, and the Museum Oversight Committee (MOC) – as determined by hierarchy structure and policy.
8. The Curator/Collections Manager shall prepare a written condition reports (complete with photographic documentation) when an item is discovered to be in need to specialized care or if an item is damaged in any way by accidental, natural, etc., causes.

## HANDLING OF COLLECTIONS

Since museum collections are at the greatest risk of damage while being handled or moved, it is important that a standard set of collections handling guidelines be rigorously adhered to. Handling museum collections entails care, cleanliness, and commonsense. The following rules assume that the collections to be handled are relatively stable, pest free, and under two hundred (200) pounds. The following collections care guidelines do not account for the outdoor areas of the museum (e.g. transport yard).

1. When handling collections, make sure to remove any cumbersome jewelry or ID badges. These items could catch on items and cause them to fall, rip, break, etc.
2. Make sure to wear nitrile gloves when handling objects.
  - a. Alternative to nitrile gloves are 100% cotton. Available upon request.
  - b. Exceptions to wearing gloves include handling glass, highly-glazed/slippery surfaces, some sculptures, or items where the texture of the item would cause the item to catch (if that item is breakable).
3. Have a movement plan. Know exactly where you will put an object before picking it up. Check your pathways, open necessary doors, etc., prior to the move.
  - a. Due to the NMMM's layout, stairs are inevitable. When moving fragile items from the basement to the conservation room, office, or display area, utilize proper packing/storage materials and move the items as stored (if available to do so). This is in order to give an extra layer of protection if dropped.
  - b. If damage occurs, report the circumstances immediately to the Curator/Collections Manager or Museum Director.
  - c. Carry only one object at a time, no matter how small, using two hands. Use two or more people to handle large, unwieldy, or heavy objects; do not hesitate to ask for help.
  - d. Move the object in its most stable position, usually in the position in which it is displayed or stored. Use existing storage or create new temporary storage if able.
  - e. Protect the object from being bumped, skidded, or jostled. Your movement plan should use the path of least resistance.
  - f. Check carts and vehicles for cleanliness, stability, and movability before loading.
  - g. Take your time. When handling many objects, work at an even pace, take breaks often, and do not continue to work when you are fatigued.

- h. Handle each object as little as possible. Bring carts or moving vehicles to the object.
  - i. Protect objects on carts from each other, as well from the cart surface, with padding (e.g. ethafoam, cotton pads, etc.). Use acid-free tissue or ethafoam between objects. Secure any object being moved on a vehicle. Do not put objects of very different sizes or weights on the same vehicle.
- 4. Never work with tools over the object. Do not lift one object over another; move objects one at a time to reach those on the back of a shelf.
- 5. Do not eat or drink in or around artifact storage, display, or preparation areas. Confine these activities to approved areas well away from collections storage, and/or galleries.
  - a. Exception: Water in a sealable, leak-proof, bottle will be allowed in preservation, gallery, and storage areas if kept away from core work area.
- 6. Please consult preventative conservation sources, or request more information from the Curator/Collections Manager and/or Museum Director if you have any questions or concerns regarding handling of a particular object or material.
- 7. If additional PPE is required based on suspicions of mold, excessive dust, allergies, etc., please make the request through the Curator/Collections Manager and/or Museum Director for additional supplies.

## Review & Follow Up

These policies and procedures regarding the collections care activities of the NMMM are implemented through the provisions and delegations of authority enumerated in this *Collections Policies, Procedures, and Implementation Manual*, as well as through evaluation of published sources regarding accepted standards of preventative conservation and professional museum practice. All Museum staff and volunteers shall adhere rigorously to all approved/implemented collections care policies and procedures.

Museum staff that are responsible for collections care – primarily the Curator/Collections Manager – have a duty, inherent to their position, to keep apprised of new literature, science, and cataloging practices as well as theory.

## COLLECTIONS DOCUMENTATION & INFORMATION

### Definition

Collections Documentation is the approved process within a museum for the capture, storage, maintenance, and preservation of all collections information

pertaining to those materials held and maintained by the institution. Collections Information is the foundation of knowledge surrounding the items in the NMMM's collection. This information includes documentation of historical and academic significance, physical characteristics, legal status, and the general provenance of collection objects before and after their entry into the museum.

## Principles

The proper maintenance and preservation of information pertaining to collections is activity essential for successful collections management. Without the appropriately associated information, collections objects lose their context, relevance, and serve little function to the efforts of the Museum. Therefore, the NMMM requires responsible and disciplined recordkeeping and preservation of collections information via a thorough adherence to the following guidelines:

1. The NMMM works to preserve material collections, but also the information pertaining to said collections in order to facilitate object tracking, inventory, identification, research, access, and more.
2. Proper object documentation allows the public remote access to the collection when they are not on display and/or available for viewing.
3. As a matter of ethics and legality, documentation of museum collections shall strive towards proof of legal ownership.
  - a. This is easily done with new, incoming, accessions. However, older on-site collections that were not documented properly upon reception and/or collections where the paperwork is lost can become an issue. In these instances, utilize "good faith" practices.
4. Proper documentation practices enable the NMMM to meet current professional standards that mandate that collections information be thorough, accurate, and accessible.
5. As part of its educational mission, the NMMM seeks to provide the widest possible access of its collections information without compromising the security, confidentiality, ethical standards, or intellectual property rights (including copyright of its collections).
6. The NMMM will maintain all relevant hard-copy documents in its records – including the creation of records via the collections database – with the intent of retaining these indefinitely. The Curator/Collections manager will have the primary responsibility of oversight for the preservation and active maintenance of all documentation (including digital as inherent with access).
7. The NMMM shall remain apprised of industry-wide documentation practices and standards via scholarly publications, webinars, conferences, continuing



education, and other sources of reputable information. The NMMM shall strive to implement these standards as part of its daily operations.

8. No collection(s) records shall ever be purged, destroyed, edited or altered – except in cases where prudent collections management practices dictate.

## Policy & Procedure

Hard-copy documentation and utilization of collections management database systems shall go hand-in-hand with many practices occurring in tandem and/or one informing the other. As discussed previously, when used appropriately, the Temporary Custody Receipt shall inform the initial entry into the collections database (Proficio!Elements). The digital record, including accession/collection information, shall inform the Deed of Gift and Thank You Letter, and finalized hard copies with signatures, shall be the basis for the hard-copy record which will be recorded, digitally, as being returned and signed – thusly, completing the cycle (and with entry into the Accession Journal).

## DOCUMENTATION LIFECYCLE

While many steps pertaining to the documentation process have already been discussed (see: [Acquisition and Accessioning of Collections](#)), this section will be dedicated to definitions and use of the following: Temporary Custody Receipt, Deed of Gift, Thank You Letter, and additional documentation examples.

### *Temporary Custody Receipt*

Temporary Custody Receipts can be used in a multiple of ways. This form is used to take temporary custody of an item. An item can be temporarily given to the New Mexico Military Museum for use in exhibition, study, or for the purposes of accessioning it into the collection. However, until the item is officially signed over to the museum, the item(s) are still legally owned by the individual/institution. This form, more than anything, is a receipt between two parties until formal documentation can be drawn up via our collections software. This is not to be confused with incoming loan documentation, accessioning documentation (Deed of Gift), or any other legally binding document – however, it can and does help to inform these other documents.

### *Deed of Gift*

A Deed of Gift is a signed legal document that voluntarily, and without recompense, transfers ownership of real, personal, or intellectual property – such as a gift of materials – from one person or institution to another.



The Deed of Gift will be created via our collections management system (Proficio!Elements). The Deed of Gift shall be created after the items are in the care of the Museum, have been accessioned, and finally cataloged into our digital system. Once the items have been cataloged (and ideally photographed), a Deed of Gift will be produced via the Reports function. Once the Deed of Gift has been printed, it will be sent to the donor for signature and returned to the Museum. Once the Museum is in possession of the signed Deed of Gift, the Curator/Collections Manager or Museum Director (whomever is listed on the Deed of Gift – whomever created the Deed of Gift) will countersign the document and place it within the accession files and the information entered and/or updated in the Accession Journal.

### *Thank You Letter*

To be included with the Deed of Gift (to the donor), is the Thank You Letter. The Thank You Letter, however, must include accession information (e.g. accession number) for donor reference, and describe the scope of the collection being donated. Alternatively, the Thank You Letter can include an accession/item list (auto populated through Proficio!Elements). The Thank You Letter should be signed by either the Curator/Collections Manager and/or Museum Director and include language regarding donation valuations such as:

*The New Mexico Military Museum does not appraise items gifted to the museum. It is the donor's responsibility to obtain an appraisal and consult with their tax specialist to determine possible tax deduction(s). All appraisals shall be conducted prior to donation. No goods or services were received in return for this gift.*

## **COLLECTIONS MANAGEMENT DATABASE SYSTEMS**

The New Mexico Military Museum utilizes the collections management system Proficio!Elements. However, standards for cataloging, cataloging ability, and field use are the same across most, if not all, collections management systems (e.g. PastPerfect, The Museum System, Eloquent Systems, etc.). Proficio!Elements is a web-based system and therefore is accessible wherever there is an internet connection. This system was selected based on its web-based platform, automatic back-ups, archival descriptive entry capabilities, learning library, as well as its ability to “go live” with public access capabilities provided the necessary updates, contracts, and designs has been completed (via the Proficio!Elements team).

## **Implementation**

Roles, responsibilities, and procedures surrounding the creation and implementation of records (both digitally and hard copy) shall be as follows:

1. Documentation and accessioning of incoming collections should happen as they come in. There should never be a back-log of current donations. It is understandable that there will be a back-log of older collections (e.g. from years past), but new donations will be handled promptly and efficiently given adequate staff.
2. Temporary Custody Receipts can be completed by any qualified museum staff persons (e.g. Curator/Collections Manager, Museum Director, trained intern) – as this is not a legally binding contract.
3. The decision to accession, deaccession, or approve incoming loans rests with the Curator/Collections Manager as well as the Museum Director. Therefore, a Deed of Gift/Thank You Letter shall only be completed/finalized by those listed staff members. However, assistance in cataloging and database entry can be assigned as long as the Curator/Collections Manager and/or Museum Director has fully trained this individual. The Curator/Collections Manager and/or Museum Director must check their work and/or edit if necessary.
4. As mentioned previously, hard copies created and obtained through the accession or loan process shall be filed as such – with each accession/loan having its own folder – at minimum. Later, when appropriate/needed, each item should have their own folder to account for conservation work, exhibit histories, etc.
5. Outgoing and Incoming Condition Reports for loans shall also be included in catalog records – born digital. Hard copies to be produced at the Curator/Collections Manager's, or Museum Director's, discretion (common practice is if the condition of an artifact changes).
6. Incoming/Outgoing Loan documentation is to be recorded and filed as active/non-active utilizing the regular tripartite variant system with "L" signifier – as previously discussed.
7. Only records/collections with adequate catalog information, digitization, and photography should be published for online access. Standards regarding these practices are to follow – e.g. cataloging strategies and standards.

## Review & Follow Up

These policies and procedures pertaining to collections documentation are for context, narrative, and eventual access of our collections beyond exhibition (e.g. online research and access of collections).

The Curator/Collections Manager is primarily responsible for documenting incoming collections, loans, and cataloging past donations. It is the Curator/Collections Manager's responsibility to produce reports, annually or as requested, regarding

incoming donations, processed back-logged donations, conservation needs, material needs, and any other collections care-related reporting, documentation, etc.

The Curator/Collections Manager will ensure that they continue their education via free Proficio!Elements training (when needed, or deemed needed by the Museum Director), and will also utilize free online webinars pertaining to information governance as it relates to collections care.

## DIGITIZATION OF COLLECTIONS

### Definition

Digitization is the process of converting materials and their data owned by the NMMM from an analog to a digital format for the purposes of making NMMM holdings accessible to the public.

### Principles

The meticulous and thorough practice of digitizing NMMM collections held and maintained is an essential function in demonstrating the accountability of the collecting institution (the New Mexico Military Museum). Without this information, the museum may become liable to claims that it is not exercising “due care” and control over collections it owns or borrows. By contrast, possessing such a digital record not only protects the Museum against such claims, but makes its holdings much more widely accessible to otherwise underserved audiences in continuance of mission-driven objectives, while providing a baseline record for the identification, tracking, preventative conservation, and study of NMMM collections. Therefore, the museum requires responsible and disciplined collections digitization practices via a rigorous adherence to the following principles:

1. Collections entering the Museum via new acquisition (incoming donation), current loan, or current exhibition shall be given top priority for the purposes of digitization and recordkeeping in Proficio!Elements.
2. Second priority of digitization shall be granted to items/collections where context, documentation, etc., is solid and therefore warranty of title, ownership, and copyright can be safely presumed (for access).
3. The Museum shall always seek to conduct its digitization activities of incoming loan items with respect to the stated loan terms, as well as with regard to any and all intellectual property rights of the lender, and to refrain from photographing said collections items where these terms preclude such use. The responsibility for researching and obtaining permissions for use shall be vested in the Curator/Collections Manager.

4. The NMMM shall seek to capture the most accurate and detailed record of all digitized items via the employment of: measurement scales, color scales, and appropriate PPI (e.g. 400-600), and any other notations pertaining to camera or scanner specifications.
5. Editing raw files is suggested for public access images – images used via a [Rights & Reproduction Request](#) and/or in Museum/staff articles or publications. Suggested edits are levels, lens distortion/correction, exposure, artifact removal (i.e. dirty lens, in-shot scratches, etc.), cropping, corrections for clarity of text option (scans of documents), etc.

## Implementation

Appropriate museum staff (Curator/Collections Manager, Museum Director, trained interns/volunteers, etc.) may implement digitization practices under the guidance of the Curator/Collections Manager or Museum Director.

The Museum Director will conduct sporadic overviews of digitization and cataloging efforts. Any issues or redirections will be initiated by the Museum Director where applicable (to the Curator/Collections Manager) or to assigned staff.

Digitization trainings may occur based on recorded, requested, or perceived need.

## INSURANCE

As authorized by Rule 1.6.5.8 of the New Mexico Administrative Code (“Certificates of Coverage”), a Letter of Administration issues Property and Liability Certificates of Coverage. The type, extent, and nature of the coverages extended under these Certificates of Coverage are set out in Rule 1.6.5 of the New Mexico Administrative Code.

The Certificates of Coverage provide property and liability coverage to the extent required by the Insurance on Public Buildings Act (NMSA 1978, § 19-5-1 et seq.) and the New Mexico Tort Claims Act (NMSA 1978, § 41-4-1 et seq.). These Certificates of Coverage supersede and replace any and all prior Certificates of Coverage.

## Definition

Insurance, in this instance, is the promise of future compensation for specific (negative) outcomes affecting the holdings of the New Mexico Military Museum or items temporarily in its custody.

## Principles

Certificates of Coverage, under the State of New Mexico, protects of NMMM collections/collections in custody, structures, vehicles, and personnel against injury, damage, harm, theft, destruction, etc., and is an essential function for any collecting institution. Such actions demonstrate not only appropriate concern for the welfare of the human resources of the organization, but also goes a long way toward establishing “due care” and consideration of those materials placed in the trust of the Museum.

For further information, please see the current FY Letter of Administration.

## Policy & Procedure

1. The NMMM will be responsible for obtaining the Letter of Administration, which details coverage, each FY. A Certificate of Coverage shall be requested based on an agreed upon donor valuation for each loan.
2. If additional coverage is needed, the Museum will be responsible via State Programs to detail, report, and request an additional policy.
3. The decision to obtain additional coverage will be at the discretion of the Director of State Programs and the Museum Operations Committee (MOC).

## INCOMING & OUTGOING LOANS

Insurance practices, in part, will be informed by the Letter of Administration/Certificates of Coverage but will also be informed by external documentation/requirements (e.g. loan agreements). Therefore, the following should be considered:

1. Outgoing loans are to be insured and paid for by the borrower. The Museum Oversight Committee (MOC) must authorize any exception in writing.
2. Incoming loans are to be insured by the State (see: Letter of Administration/Certificates of Coverage), in accordance with the Incoming Loan Agreement.
3. If an object loaned to the museum exceeds \$25,000 in value, an additional, temporary, insurance coverage document will be produced to ensure coverage and meet Incoming Loan requirements (set by lender).
4. The Letter of Administration/Certificates of Coverage shall insure objects left for custodial purposes, under a Temporary Custody Receipt.

## DOCUMENTATION

Supplemental insurance records shall be maintained with the appropriate object's file (e.g. Accession, loan, or exhibit), and the authority/responsibility for maintaining these records shall reside with the Curator/Collections Manager.

## Implementation

These policies and procedures regarding the insurance of collections under the care and control of the New Mexico Military Museum are implemented through the provisions and delegations of authority enumerated in this manual. All Museum staff and volunteers shall adhere rigorously to all approved/implemented insurance policies and procedures.

## RISK MANAGEMENT & SECURITY

### Definition

For the purposes of this manual, Risk Management can be defined as the process of identification/documentation and evaluation of risk in order to prevent or to minimize exposure to factors which may cause loss of, damage, harm, or deterioration of collections and those working with collections. Security, in this instance, is the process of generating and implementing measures in order guard NMMM collections against theft, damage, or destruction and ensuring that museum staff, and those falling under that umbrella, implement safe practices to not only the collections but themselves as well.

### Principles

The implementation of measures designed to mitigate risk, damage, harm, or destruction to museum property, and to those that work with them, is an essential function for any institution. For a collecting institution, such actions demonstrates not only appropriate concern for the welfare of museum staff, but the collections as well. This goes a long way toward establishing "due care" and consideration of those materials placed in the trust of the Museum. Therefore, the Museum requires responsible, disciplined risk management and security practices via a rigorous adherence to the following principles:

1. While implementing New Mexico Military Museum's mission, there is an inherent risk associated to NMMM collections. Risk factors increase when items are loaned, in transit, are stored (primarily incorrectly), or while being studied, treated, or handled (excessively).
2. Personnel of the Museum may risk harm or other injury due to a variety of risk factors including environmental hazards, failure to utilize proper PPE if

necessary, danger due to other incidents such as fire, miss-handling items/equipment, or from external factors.

3. Prudent collections management mandates the identification and elimination/reduction of risks to collections objects, grounds, and employee personnel.
4. Any system of risk management requires a precise and thoughtful review of all existing and potential hazards, including but not limited to: natural disaster, vandalism, theft, disease (environmental risk), space limitations/utilization, human error, mechanical or operational system failure, and natural deterioration.

### Policy & Procedure

The majority of Risk Management, Disaster Management, etc., planning will be in the New Mexico Military Museum's Disaster Management Plan, which is currently in development.

Through established and agreed upon museum standards and best practices, the NMMM shall endeavor to employ short-term and long-term risk mitigation of its holdings.

### Collections Care

1. Only appropriate staff members, or trained persons associated with the Museum, shall have physical access to the collections and collections storage areas.
2. The Curator/Collections Manager is responsible for the training and guidance of additional Museum staff members (e.g. interns, volunteers, additional staff, etc.), as well as adherence to museum standards and best practices.
3. Those with the authority to handle collections must do so following proper handling techniques and materials as stated in the section: [Handling of Collections](#), as well as stay apprised of new techniques and literature.
4. Environmental readings, which are checked weekly by the Curator/Collections Manager, or designee, will be adjusted as needed. Yearly environmental reporting will be conducted by the Curator/Collections Manager using the Museum's PEM<sub>2</sub> Dataloggers and utilization of the eClimate Notebook.
  - a. The main storage areas should be kept at 65°F and 33%RH (+/- 3) for attainable, optimal, preservation. This amount may be changed based on HVAC capabilities and standard "base" readings. However, stable, but adequate, readings are more important than inconsistent, but ideal, readings.



- b. The gallery spaces, and their environmentals, should be adjusted slightly to account for human comfort while also trying to balance preservation. Therefore, they should be kept at 69°F and 29%RH (+/- 3) for attainable preservation and human comfort. However, these figures may be adjusted to account for HVAC capabilities and standard “base” readings. However, stable, but adequate, readings are more important than inconsistent, but ideal, readings.
5. Items discovered that contain potentially harmful particulates, mold, etc., should be reported immediately to the Curator/Collections Manager and/or Museum Director. A written report containing plans for conservation, treatment, deaccession, etc., as well as the required tools shall be reported to the Museum Director. The items shall be removed from the collection and placed in an area that would continue “due care” of the existing collections while also taking into account personnel safety.
6. The Curator/Collections Manager and the Museum Director, under the guidance and support of the Museum Operations Committee (MOC) will endeavor to continuously evaluate risk management of the collections.

### *Security*

1. Only appropriate staff members shall have security/key access to the collections and collections storage areas. The Curator/Collections Manager, Museum Director, and Administrative Services Coordinator are the only staff members to have unrestricted access to all storage and exhibit areas.
2. As need arises, and positional hierarchy changes, additional staff members may obtain keys to the main facility and gallery spaces to facilitate access.
3. A security system – including cameras – will be placed in and around the museum. The system will record the exterior exhibit areas, parking lot, entrances, storage spaces, gallery spaces, and so on. Only the Museum Director and one other designee will have access to these cameras.
4. The Curator/Collections Manager is responsible for setting the gallery alarms. The last person out of the building is responsible for setting the facility alarms.

### *Implementation*

These policies, and areas of note regarding risk management and security of personnel and collections, shall be implemented through the provisions and delegations of authority described here. All NMMM staff and associated persons shall adhere to NMMM’s risk management guidelines and security policies and procedures.



The responsible staff member (i.e. Curator/Collections Manager) shall seek to implement these policies by ensuring that all collections objects are maintained in controlled areas which have been adequately protected against a variety of threats, including, but not limited to: fire, flood, handling, theft, vandalism, natural disaster, etc.

## ACCESS

### Definition

In a museum context, Access can be defined as the opportunity for Museum staff, visiting research personnel, representatives of the scholarly community, and members of the general public to utilize the collection of the NMMM. In the past decade or more, a strong emphasis has been put on digital/on-line access. This is something that the NMMM is currently striving toward – to make collections available online for study.

### Principles

In order to fulfill its mission of, "...to discover, preserve, and disseminate knowledge about New Mexico's military history," the NMMM establishes and encourages many applications of access to collections and related information via the following variety of methods:

1. Exhibition
2. Public Programming
3. Research/Visiting scholars
4. Incoming/Outgoing Loans
5. Searchable collections via Proficio!Elements
6. Publication/Rights & Reproduction fulfillments
7. Social Media
8. Staff articles via our website

It shall be institutional policy to allow reasonable access to Museum collections and associated information. However, this must be scheduled in advance and through the Curator/Collections Manager and cannot take away from assigned tasks and deadlines.

### Policy & Procedure

#### PHYSICAL ACCESS

To ensure "due care" to the items loaned/given to the Museum, the NMMM and its staff shall seek to control, monitor, and document all access to and subsequent use of collections objects and related information. It shall be Museum policy to enforce

and implement tight access and control of collections and associated information via a variety of means which includes, but is not limited to:

1. Physical restrictions – e.g. key control
2. Electronic observation

In addition to the above restrictions inherent with basic security protocols and standards, it shall be policy of the museum to further restrict access to collections materials based on the following variables:

1. Availability of collections information
2. NMMM resources
3. Security considerations
4. Condition of item(s)
5. Nature of access request, and subsequent usage
6. Intellectual property rights
7. Issues of cultural sensitivity

In accordance with standard museum practices, only the Curator/Collections Manager and/or Museum Director shall have regular, unrestricted access to the collections. In the Curator/Collections Manager's absence, the Museum Director will oversee the temporary designee of the Curator/Collections Manager (e.g. Collections Assistant, Collections Intern, etc.). However, this designee must be paid staff and be decided upon beforehand.

Access to collections and associated documentation may be granted by the Curator/Collections Manager and/or Museum Director if such access is deemed prudent and in the best interests of the care, preservation, and security of the collections, as well as the interests and reputation of the museum.

### **DIGITAL ACCESS & USE**

Digital images of collections held and maintained by the New Mexico Military Museum are the property of the Museum. Digital images generated from the collection may be utilized for commercial and/or non-profit use as long as the following conditions are met:

1. Any image to be used must meet the minimum digitization standard (see: [Digitization of Collections](#)).
2. Rights & Reproduction Request form must be completed by borrower, in full, before request can be approved, denied, completed, etc.
3. Right & Reproduction forms MUST include usage rationale.
4. Requests for commercial, educational, and non-profit use are welcome.

5. The New Mexico Military Museum will charge fees for commercial use based on fee schedule.
6. The New Mexico Military Museum will ONLY charge fees for educational/non-profit use of image(s) if item is NOT already digitized currently – see fee schedule.
7. In any usage scenario, a citation must accompany the image. Suggested citation will be placed within the digital file but also be included in final contract.
8. Mass production of digital images owned by the NMMM, by a third-party, is prohibited.
9. Manipulation of a NMMM image is allowed under Fair Use – however, intended use in this manner should be listed under rationale.

### Implementation

The Rights & Reproduction Request form should include the requestor's contact information, intended use – rationale, and accession/catalog information of the items to be used. The requestor will submit the completed form to the Curator/Collections Manager who will work towards fulfilling the request. Correspondence between Curator/Collections Manager and requestor is imperative to discuss need (e.g. format, resolution, editing, distribution, etc). However, the Museum Director has final approval regarding use of museum collections. Additional requirements for publication shall be the proper citation and gifted copy of the publication to the museum.

Practices and activities inherent to the process of granting access to Museum facilities, collections, and shall be conducted in full accordance with the strict procedural guidelines enumerated in this document. Museum staff and volunteers shall adhere rigorously to all approved/implemented access policies and procedures.

## SPECIAL LEGAL & ETHICAL CONSIDERATIONS

### Definition

This section of the *Collections Policies, Procedures, and Implementation Manual* will attempt to cover specific legal and ethical issues one may stumble across while dealing with collections. While not inclusive of all potentialities and eventualities, this section will attempt to address the more common examples of ethical and legal issues facing museum collections.

### NATIVE AMERICAN GRAVES PROTECTION AND REPATRIATION ACT

Since 1990, Federal law has provided guidance for the repatriation and disposition of certain Native American human remains, funerary objects, sacred objects, and objects of cultural patrimony. By enacting NAGPRA, Congress recognized that human remains of any ancestry "must at all times be treated with dignity and respect." Congress also acknowledged that human remains and other cultural items removed from Federal or tribal lands belong, in the first instance, to lineal descendants, Native American Tribes, and Native Hawaiian organizations. With this law, Congress seeks to encourage a continuing dialogue between museums and Native American Tribes as well as Native Hawaiian organizations and to promote a greater understanding between the groups, while at the same time recognizing the important function museums serve in society by preserving the past. (US Senate Report 101-473).

Therefore, baring the above in mind, the New Mexico Military Museum will follow this law by:

1. The NMMM will not accept items that potentially fall into one of the following categories: human remains, funerary objects, sacred objects, or objects of cultural patrimony.
2. The NMMM will attempt to facilitate return by contacting appropriate tribal entities.
3. If an existing item potentially falls under one of the above categories, but current, appropriate, tribal leaders take no repatriation action, the NMMM will continue to care for the item but will not display it nor allow access.

### ITEMS OF CULTURAL SIGNIFICANCE

The Museum supports the efforts of local, state, national, and international authorities to protect art, antiquities, national treasures, and ethnographic material from destructive exploitation or unethical gain. The Museum rejects the illegal traffic of art and cultural objects that contributes to the robbery of museums and monuments and the irreparable loss to science and humanity of archeological remains. Objects and specimens that have been stolen, unscientifically gathered, improperly excavated, or unethically acquired shall not be made part of the Museum's assembled collections.

The most common legal and ethical quandary will be items of war. Items that extended beyond [Rule 49](#) must be compared against other institutions, current literature and laws, etc., for rarity and potential "Item of Cultural Significance" designation.

## Implementation

The [Acquisition & Accessioning of Collections](#) portion of this manual discusses the ethical and legal responsibility to accurately document incoming collections via “warranty of title” which provides adequate proof that the donor has the legal right to donate the item(s) to the New Mexico Military Museum. Upon researching donation considerations, or researching collections in general, items of cultural significance and/or items that could potentially fall under NAGPRA (Native American Graves Protection and Repatriation Act) should be studied with a harsher lens. Items of this nature should not be accessioned into NMMM collections. Instead, offer to be the agent for the donor – if they wish to do the right thing and relinquish ownership to the appropriate entity.

The Curator/Collections Manager will be responsible for ascertaining ownership, research, ethics, and legality of items being offered as well as documenting and submitting proposals for deaccession and repatriation to the Museum Director and Museum Oversight Committee (MOC) for items already in NMMM collections.

## ACCOUNTABILITY & REVISION

The Curator/Collections Manager is responsible for ensuring that the latest professional museum standards are being met (with regards to collections management) and that the *Collections Policies, Procedures, and Implementation Manual* is being observed and adhered to by all staff (in conjunction with the Museum Director). The Curator/Collections Manager shall also be responsible for making revisions to the *Collections Policies, Procedures, and Implementation Manual* every three years, or with greater or lesser frequency as warranted. This review process seeks to correct any oversights in previous policy, and to account for new circumstances that have arisen since the last review. Prior to implementation, both the Museum Director and the Museum Oversight Committee (MOC) must approve all revisions to established NMMM policy and procedure.<sup>2</sup> The Curator/Collections Manager shall report annually to the Museum Director, regarding the NMMM’s ability to comply with the *Collections Policies, Procedures, and Implementation Manual*. Museum staff responsible for collections activities should refer to this manual, as well as all refer to relevant procedural guidelines enumerated in this document.

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<sup>2</sup> This *Collections Policies, Procedures, and Implementation Manual* is the first of its kind and, therefore, no previous such document is available nor in practice. This section of review will take place following the implementation of this initial document.

## APPENDICES

### New Mexico Military Museum Forms

This section of the *Collections Policies, Procedures, and Implementation Manual* may be updated at will to account for additional forms needed to fulfill the policies and procedures listed in this manual. All proposed forms should be run by the Museum Director prior to their inclusion and utilization. The replacement of existing forms, however, shall only be done with the approval of the Museum Director.

## TEMPORARY CUSTODY RECEIPT

	1050 OLD PECOS TRAIL, SANTA FE, NM 87505 WWW.NEWMEXICOMILITARYMUSEUM.COM (505) 476-1479	ACC#/LOAN ID: <span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;"></span>
---	---	--

## TEMPORARY CUSTODY RECEIPT

SOURCE/DONOR INFORMATION

BUSINESS:

PRIMARY CONTACT:   
(FIRST MI LAST)

MAILING ADDRESS:   
(NUMBER, STREET, CITY, STATE, ZIP)

PHONE:  E-MAIL:

PREFERRED METHOD OF CONTACT: ☐ PHONE ☐ E-MAIL

CITATION:

PURPOSE

<input type="radio"/> UNCONDITIONAL <small>The museum reserves the right to keep, lend, or otherwise dispose of the donated material.</small>	<input type="radio"/> CONSIDERATION <small>The objects are to be reviewed for possible accession to the museum collection.</small>	<input type="radio"/> LOAN <small>The objects are being temporary transferred to the museum's care until official loan documentation can be completed.</small>
--	---	---

(to be completed by museum staff)

DESCRIPTION OF DONATION/OBJECTS


NUMBER OF OBJECTS TAKEN INTO CUSTODY:

NUMBER OF LF (ARCHIVAL) TO BE TAKEN:

**MUSEUM STAFF**  
 Name:  Signature:  Date:

**DONOR/SOURCE**  
 Name:  Signature:  Date:

## THANK YOU LETTER



Recipient Name  
Street Address  
City, ST ZIP Code

August 20, 2020

Dear Recipient Name,

Thank you for your object archival donation to the New Mexico Military Museum. Your donation will help us to continue with our mission statement which is, in part, to "...discovers, preserve, and disseminate knowledge about New Mexico's military history."

Please review, sign, and return the *Deed of Gift* to the New Mexico Military Museum. Returning the signed *Deed of Gift* finalizes the donation process, grants the Museum ownership, and therefore allows the Museum to use the items to continue its mission.

Keep this *Thank You Letter* for you records.

Sincerely,

Your Name  
Title

Accession No.

The New Mexico Military Museum does not appraise items gifted to the museum. It is the donor's responsibility to obtain an appraisal and consult with their tax specialist to determine possible tax deduction(s). All appraisals shall be conducted prior to donation. No fee or services were received in return for this gift.



## RIGHTS &amp; REPRODUCTION FORM

**New Mexico Military Museum** 1050 OLD PECOS TRAIL, SANTA FE, NM 87505  
WWW.NEWMEXICOMILITARYMUSEUM.COM  
(505) 476-1479

REF NO: \_\_\_\_\_

## RIGHTS AND REPRODUCTION REQUEST

### REQUESTOR INFORMATION

BUSINESS: \_\_\_\_\_

PRIMARY CONTACT: \_\_\_\_\_  
(NAME, TITLE, MO)

MAILING ADDRESS: \_\_\_\_\_  
(NUMBER, STREET, CITY, STATE, ZIP)

PHONE: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

PREFERRED METHOD OF CONTACT: ☐ PHONE ☐ E-MAIL

### USE

☐ Educational/Fair Use ☐ Commercial

Personal, educational, or non-profit use ONLY (e.g. student report, educational lecture, exhibit, etc.) Print, publication, or other use in which monetary gain is likely.

(Please describe intended use.)

\_\_\_\_\_

### ITEM(S) REQUESTED

(Please include the accession no., item no., file format, etc.)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### FEES

ITEM STATUS	EDUCATIONAL/FAIR USE	COMMERCIAL
Already Digitized	\$0.00	\$5.00
Needs Digitization	\$10.00	\$10.00
Out-sourced Digitization	Price of Contract/Labor	Price of Contract/Labor

### POLICIES & TERMS OF USE

The New Mexico Military Museum's collections have been obtained from many sources and are intended, primarily, for research and educational use. Certain works may be protected by Title 17 of Copyright Law, trademark, or related interests not governed by the New Mexico Military Museum (NMMM). Permission of use will be granted only to the extent of the museum's ownership of requested items as well as the ability to fulfill said request. The responsibility



1050 OLD PECOS TRAIL, SANTA FE, NM 87505  
WWW.NEWMEXICOMILITARYMUSEUM.COM  
(505) 476-1479

REF NO: \_\_\_\_\_

for ascertaining whether any additional rights exist, and for obtaining all necessary permissions, remains with the requestor.

Use of NMMM images, in any context, will be cited. Citation for the requested works will be issued with their digital file once the request is complete. At present, we can only fulfil digital requests and cannot offer hard-copies of requested images nor CDs or USB drives. If published, a copy of the article, photo etc. shall be provided to the museum free of charge.

Completion of this form does not guarantee approval or fulfillment of this request. The New Mexico Military Museum has the right to deny use for any reason.

#### AGREEMENT

I, \_\_\_\_\_, agree and understand the terms set forth here. I will use the image(s) only as dictated by this agreement. I will inform the New Mexico Military Museum *immediately* to any adjustments or changes to this agreement *prior* to use of the image(s). I understand that payment must be received before fulfillment of the request. I understand that completion of this form does not guarantee permission to use NMMM images. I will not hold the NMMM responsible for any copyright issues or restrictions.


#### REQUESTOR

Name: \_\_\_\_\_ Signature:  Date: \_\_\_\_\_

#### MUSEUM STAFF FULFILLING REQUEST

Name: \_\_\_\_\_ Signature:  Date: \_\_\_\_\_

#### DIRECTOR APPROVAL

Name: \_\_\_\_\_ Signature:  Date: \_\_\_\_\_

### *Fee Schedule<sup>3</sup>*

Item Status	Educational/Fair Use	Commercial
Already Digitized	\$0.00	\$5.00
Needs Digitization	\$5.00	\$10.00
Out-sourced Digitization	Price of Contract/Labor	Price of Contract/Labor

This current fee schedule will be updated as complexity of our offerings increases.

### *In-Image Credit Example*

Citations should include, where possible, the following information:

1. Accession number
2. Item/Object/Image number
3. Date (c., or n.d. if precise date is unknown)
4. Title (or identification of object)
5. Artist name (if applicable – artwork)
6. Credit line (if applicable)
7. Institutional “thanks”
  - “Courtesy of...”
8. Copyright Information



<sup>3</sup> Currently, the NMMM does not have full digitization capabilities. However, plans are underway to purchase the necessary equipment. This policy is for future operations once the needed equipment is in place.

# Proficio!Elements Forms

## DEED OF GIFT

<b>DEED of GIFT RECEIPT</b>	
	<b>ACCESSION NUMBER</b>
<b>NAME OF DONOR(S)</b>	<b>TELEPHONE NUMBER (Give Area Code)</b>
<b>ADDRESS (Number, Street, City, State and Zip)</b>	
<p>Whereas the Museum is dedicated to the preservation and protection of objects significant to the interpretation of the everyday lives of citizens of the United States,</p> <p>I/We do hereby unconditionally donate to the Museum, for its unrestricted use, the item(s) listed below.</p> <p>I/We also acknowledge actual delivery of the item(s) listed below to the Museum.</p> <p>I/We certify that I/we hold free and clear title to the subject property and that I/we may dispose of it in any manner that I/we may determine.</p> <p>I/We certify that I/we hold free and clear title to the copyright for the subject property and that I/we may dispose of it in any manner that I/we may determine.</p>	
<b>DONOR(S) SIGNATURE (Please use ball point pen)</b>	
SIGNATURE	DATE
SIGNATURE	DATE
<b>DESCRIPTION OF OBJECTS</b>	
<p>The Museum hereby gratefully acknowledges the receipt of the item(s) listed above.</p>	
SIGNATURE	SIGNATURE
TITLE	
<p><small>GIFTS TO THE MUSEUM ARE TAX DEDUCTIBLE AS CHARITABLE CONTRIBUTIONS, HOWEVER IT IS THE DONOR'S RESPONSIBILITY TO SECURE APPRAISALS TO SUPPORT DEDUCTIONS. (See IRS Pamphlet 561)</small></p>	

## INCOMING LOAN AGREEMENT

Page 1 of 2

## Incoming Loan Agreement

---

**Loan Number:**


---

**BORROWING INSTITUTION:** New Mexico Military Museum

Address: 1050 Old Pecos Trail  
Santa Fe, NM 87505 United States of America

Telephone: (505) 476-1475

Fax Number:

Contact: Samantha Tubbs

E-mail: samantham.tubbs@state.nm.us

Shipping: n/a

Address:

---

**LENDER:**


---

Address:

Telephone:

Fax Number:

Contact:

E-mail:

Title:

Shipping:

Address:

---

**PURPOSE OF LOAN:**


---

Credit Line:

---

**OBJECTS IN LOAN:**


---



---

**START DATE:**


---



---

**TERMINATION DATE:**


---

**INSURANCE AND SHIPPING/PACKING:**

Insurance Paid By:

Insurance Company:

Packer/Shipper:

Method of Shipping: Outgoing:

Date Extension (if necessary):

Policy No.:

Loan Received by:

Return:



## Incoming Loan Agreement (Continued)

### LOAN CONDITIONS:

Incoming loans are subject to the terms and conditions noted on the attached Conditions for Incoming Loans.

Additional Loan Conditions:

### SIGNATURES:

ON INITIATION OF THIS AGREEMENT, The undersigned borrower is an authorized agent of the borrower. Signature indicates agreement to terms specified in this loan agreement and attached conditions.

PLEASE SIGN BOTH COPIES AND RETURN THE ORIGINAL.

Contact (Lender)

Signature

Date

Samantha Tubbs, Museum Director

Contact (Borrower)

Signature

Date

### RETURN STATUS:

Extension Termination Date:

### RETURN OF LOAN:

The undersigned is an authorized agent of the lender. Signature acknowledges receipt of all material in good condition or in condition as noted on this agreement or in attached object condition report(s). A signed copy is sent to the borrower to acknowledge the return of the loan.

Contact (Lender) (Please Print)

Signature

Date

## OUTGOING LOAN AGREEMENT

Page 1 of 2

## Outgoing Loan Agreement

---

**Outgoing Loan No.**


---

**LENDING INSTITUTION (Lender):**

New Mexico Military Museum  
 Address: 1050 Old Pecos Trail  
 Santa Fe, NM 87505 United States of America

Telephone: (505) 476-1475  
 Facsimile:

Contact: Samantha Tubbs  
 Shipping n/a  
 Address:

E-mail: samantham.tubbs@state.nm.us

**BORROWING INSTITUTION (Borrower):**

Address:

Telephone:  
 Facsimile:

Contact:  
 Shipping  
 Address:

E-mail:

**PURPOSE OF LOAN:**

Credit Line:

**OBJECTS IN LOAN:**


---

**INITIATION DATE:**


---

**TERMINATION DATE**

**DATE EXTENSION:**

**INSURANCE AND SHIPPING/PACKING:**

Insurance Paid By:

Policy No.:

Insurance Company:

Shipping Paid By:

Loan Approved By:

Loan Prepared By:

Loan Shipped By:

Shipping Method: Outgoing:

Return:

Outgoing Loan Number \_\_\_\_\_

## Outgoing Loan Agreement (Continued)

### LOAN CONDITIONS:

Outgoing loans are subject to the same terms and conditions noted on the attached Conditions of Outgoing Loans.  
Additional Loan Conditions:

### SIGNATURES:

ON INITIATION OF THIS AGREEMENT, The undersigned borrower is an authorized agent of the borrowing institution. Signature indicates agreement to terms specified in this loan agreement and attached conditions.

PLEASE SIGN BOTH COPIES AND RETURN ORIGINAL.

\_\_\_\_\_  
Contact (Borrower)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Samantha Tubbs Museum Director

\_\_\_\_\_  
Contact (Lender)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### RETURN STATUS:

\_\_\_\_\_  
Extension Termination Date (if applicable):

### RETURN OF LOAN:

The undersigned is an authorized agent of the lender. Signature acknowledges receipt of all material in good condition or in condition as noted on this agreement or in attached object condition report(s). A signed copy is sent to the borrower to acknowledge the return of the loan.

\_\_\_\_\_  
Contact (Lender)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date