

**Museum Collections Management
Handbook**

Volume II: Practices and Procedures

**Edited by
Patricia Morris**

**California State Parks
Museum Services Section
Archaeology, History and Museums Division**

**December 2001
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Preface

Volume II of the *Museum Collections Management Handbook* is a reference for State Parks' personnel who work with or supervise work with museum collections. It provides information about collection activities that are performed frequently, and hopefully it will prove especially useful when staff need directions for an activity they have not performed in a long time. It is also meant to be a training tool for staff members who are new to collection work in DPR, as well as volunteers who assist with collection care.

Several editions of the handbook have been published over the years, the latest in 1986. Since this last handbook was distributed, many changes have taken place affecting museum collections management in the Department. In 1993 and 2001 DPR underwent substantial structural reorganizations, which changed administrative and reporting relationships. An online museum collections management system was adopted and has evolved so that it is now used in collection management in field units throughout the state. There have been changes in policy as well. In 1997 Chapter 2000: Museum Collections Management, Department Operations Manual (DOM) was completed. In conjunction with the DOM Chapter 2000, a new series of forms was created to document collection activities. We have updated the content of this *Handbook* to reflect these changes.

We believe that this new edition of the *Museum Collections Management Handbook* will serve the Department well for many years to come.

Acknowledgments

Pauline Grenbeaux. As head of Museum Services Section, Pauline initiated the revision of the *Museum Collection Management Handbook*. The collection policies in this handbook are based on the Department Operations Manual (DOM) Chapter 2000 that Pauline authored in 1997. She wrote the sections on historic firearms and categories of museum collections.

Wendy Franklin. If I said that I asked Wendy a thousand questions while compiling this handbook, the figure would probably be low. Throughout the compilation of both Volumes II and I, Wendy shared her impressive knowledge of State Parks' collection practices and by doing so greatly contributed to the handbook's content and accuracy. She wrote the first draft of the section on electronic registration and served as a reviewer for all sections as they were completed.

Betty Smart. DPR has issued several collections management handbooks. Betty compiled the last of these in 1986, and DPR staff relied on it for 15 years. Many parts of that handbook have been adapted for use in this one.

Paulette Hennem. Paulette wrote the sections in this handbook on the resolution of old and abandoned loans, deaccessions, the Native American Graves Protection and Repatriation Act of 1990 (NAGPRA), condition reports, appraisals, protective equipment, and types of hazardous materials. She served as contact and coordinator for three sections contributed by other writers on archaeology, paleontology, and natural history specimens and permits. Through her expert review, Paulette greatly improved the accuracy and quality of other sections as well.

Christina Swiden. Christina shared her substantial expertise of collection care and management in many areas, including the chapter on the work environment and the sections on marking catalog numbers on objects, inventories, and roles and responsibilities.

Other contributors: **Pete Schulz** and **Glenn Farris** worked closely with Paulette Hennem on the archaeology sections in the handbook. **George Jefferson** wrote the section on paleontology. **Diane McGrath** contributed the section on Natural History Specimen Permits.

Donna Jones, Winnie Yeung and Michelle Messinger from Museum Services Section served as reviewers of the preliminary drafts of all sections of the *Handbook*. Each contributed excellent suggestions relating to practices and procedures, drawing upon their personal experiences working in DPR field units and nonprofit museums. Winnie helped revise the wording relating to the statewide database when the conversion was made from Argus to TMS.

Jeanne Akin, Linda Cooper, Carol Dodge, Hoyt Fields, Christina Savitski, and Victoria Yturralde served on the *Museum Collections Management Handbook*, Volume II Review Committee. **Richard Clark** and **Mary Lou Lentz**, who also served on the committee, are retired. The review committee represents State Parks in California from San Diego to Redding. Its members are comprised of Museum Curators I, II, III, an Archivist, and an Interpreter II. The Committee made many improvements to the text and format and prevented many errors. The members consistently returned review copies on or near deadlines. The quality of the handbook reflects their expertise and helpful attitude.

Francisca Santana, Graphic Artist in the Department's Sign Unit produced the covers for both Volumes I and II assisted by **Angelica Anguiano**. Francisca also offered many helpful suggestions relating to design and sequence.

In DPR's Interpretive Publications Unit, I want to thank **Tom Lindberg**, who heads the unit, for providing a scanner and to **Gail Dudding**, Graphic Artist, for her technical advice on equipment, software, and format.

Former DPR museum text writer **Sheila Skjeie** proofread the text of the handbook prior to printing.

The best part of this project has been working with such capable, knowledgeable, and dedicated individuals. My thanks to all of you.

Pat Morris
Editor

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CHAPTER 1

Mission Statements

California Department of Parks and Recreation

The Mission of the California Department of Parks and Recreation is to provide for the health, inspiration, and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and by creating opportunities for high quality outdoor recreation.



Cultural Resources Division

The mission of the Cultural Resources Division is to provide inspiration and leadership in acquiring, conserving, and managing cultural resources that represent California's rich history and diverse population and to foster an appreciation of the extraordinary value of California's cultural heritage for the enjoyment of present and future generations of Californians through education, access, stewardship, and service.

Roles and Responsibilities

This section describes the personnel and administrative entities responsible for DPR museum collections management.

Director, Department of Parks and Recreation

The Director plans, directs, and controls the Department's programs to accomplish its mission. With respect to museum collections, the Director is responsible for approval of the repatriation of human remains and cultural objects in compliance with the Native American Graves Protection and Repatriation Act of 1990 (NAGPRA).

Deputy Director for Park Operations

The Deputy Director for Park Operations is responsible for approving specified activities and exceptions to Department policy. The Deputy Director's collections-related responsibilities are as follows (See also DOM 2020.1.3):

- Approves gifts subject to Department of Finance restrictions (gifts over \$15,000). (This delegation amount is subject to change. If you are in doubt, contact DPR's Budgets Section for the latest figure.)
- Convenes ad hoc committees to review deaccession proposals. Approves or disapproves the committees' recommendations.
- Approves incoming loans with terms of over two years or loans involving other policy exceptions.
- Approves outgoing loans with terms of over two years or outgoing loans involving other policy exceptions.
- Approves outgoing loans to DPR's concessionaires.
- Approves requests for exclusive license for use of intellectual property rights associated with museum objects.

In most situations, the Deputy Director for Park Operations may designate staff to assume the above responsibilities. For instance The Northern, Central, and Southern Field Division Chiefs are the Deputy's designees for approval of gift and loan activities in their respective Divisions.

Chief, Cultural Resources Division (CRD)

As head of the Cultural Resources Division (CRD), the Chief manages this division that was newly created in 2001 to provide leadership, policy direction, coordination, and technical support for the protection and management of the cultural resources under DPR stewardship. The Division's responsibilities include:

- acquiring, conserving and managing resources that are representative of California's rich history and diverse population;
- promoting an appreciation of California's cultural heritage through educational programs;
- providing curation of and access to the Department's museum collections;
- and ensuring departmental compliance with specified environmental laws, policies and procedures relating to cultural resources.

CRD directly assists the field and headquarters personnel in matters relating to cultural resources. The Division is comprised of five sections: Cultural Resources Programs, Cultural Resources Support, Museum Services Section, State Museum Resource Center (SMRC), State Archaeological Collections Research Facility (SACRF).

District and Park Superintendents

District Superintendents are responsible for the museum objects in their districts and for implementing the Department's policies and procedures for managing museum collections. With some exceptions, District Superintendents may delegate their authority for museum collection activities to Park Superintendents. See sample delegation letter, page 1.14 (Figure 1). In headquarters facilities with museum collections, Division Chiefs are responsible for the museum objects in their custody and may delegate authority to Section Supervisors.

Superintendents rely on staff for day-to-day management and consult with Museum Curators and others with specialized knowledge as needed. Superintendents are themselves involved with museum collections management as follows:

1. Superintendents ensure that museum collection management is incorporated into operational planning and budgeting. This requires that
 - Security measures are in place for all facilities with museum collections.
 - Housekeeping and maintenance schedules include museum objects.
 - Museum registration systems are in place and maintained, and inventories kept current.
 - Plans to remedy substandard care or work backlogs are in place and prioritized.
 - Museum collections management is identified in job descriptions and that appropriate job classifications are used.
 - Museum Collections Facility Index (MCFI) surveys are completed and submitted annually.
2. Superintendents designate staff to assume responsibility for specific day-to-day activities. These assignments include
 - A Designated Museum Collection Manager for each park with museum collections to provide oversight and coordination. See section below for more details and sample designation letter on page 1.15 (Figure 2).
 - Individual staff who may accept temporary custody of objects from others (e.g., pending approval of a gift). See sample designation letter, page 1.16 (Figure 3).
 - Individual staff who may release objects to others (e.g., at conclusion of an incoming loan). See sample designation letter, page 1.16 (Figure 3).
3. Superintendents decide which services are appropriate to offer and when to restrict the use of museum objects. They may
 - Designate specific objects for extended hands-on use.
 - Allow individual access to museum collections.
 - Restrict access to culturally sensitive objects.
 - Make photographic copies of museum objects available for study (or not), and collect costs.
 - Grant non-exclusive license for use of intellectual property rights associated with museum objects and collect fees (may delegate to staff with written procedures).

4. Superintendents have final approval for significant museum collection documents and transactions, including
 - Approval of Scope of Collection Statements not part of the General Plan process. This activity may not be delegated to a Park Superintendent. (see DOM 2020.1.3)
 - Acceptance of non-cash gifts under \$15,000 in value. (This delegation amount is subject to change. If you are in doubt, contact DPR's Budgets Section for the latest figure.)
 - Proposal of objects for deaccession.
 - Approval of incoming and outgoing loans of two years or less duration.
 - Transfer of objects to or from other State Parks.

Designated Museum Collections Managers

For each park with museum collections, the Superintendent is responsible for designating a Museum Collections Manager. While the classifications of Designated Collections Managers may vary, the individual must be at the level of Museum Curator I or higher. The Designated Collections Manager provides general oversight for the collection practices at the park and confirms that the elements of museum collection management are in place, although he/she may not work directly with the collections. The Designated Collections Manager consults with Museum Curators or other specialists as needed, and apprises the Superintendent of special circumstances or elements of the management program needing attention.

Museum Curators

A Museum Curator is a specialist in museum collection management. In addition to having specialized training in all aspects of collection care, curators are familiar with the departmental policies and procedures relating to materials and methods and their applications. They are also aware of prevailing professional standards and common practices in other museums. In DPR, staff with Archivist, Librarian, and State Archaeologist job classifications may also function as curators with the specialized collections they manage. In State Parks, Curators are involved in all aspects of collection care. Typical duties performed by curators are as follows:

- Oversee the acquisition, collections research, and cataloging of museum collections.

-
-
- Serve as an advisor to the Superintendent by communicating recommendations regarding unusual circumstances or special concerns that need to be determined at the district level.
 - Manage collections activities other than acquisitions (e.g., incoming loans, outgoing loans, park to park transfers, inventories, etc.).
 - Provide signature approval on these DPR museum collections management forms: outgoing loan agreement, incoming loan agreement, and authorization for extended hands-on use of objects.
 - Coordinate and supervise the storage and/or transfer of artifacts for exhibits.
 - Supervise staff and volunteers engaged in curatorial and preservation activities.
 - Manage the preservation, conservation, and restoration of museum objects.
 - Provide training and technical assistance to staff and volunteers.
 - Coordinate public relations activities with respect for museum collections.
 - Provide researchers with information about or access to museum collections.
 - Prepare budgets and schedules to support collections care.
 - Produce exhibits or other interpretive programs involving collections.

Districts that do not have a Museum Curator on staff may request assistance from a curator in another district or from the curators assigned to the Northern Service Center.

Museum Technicians

Under direction, Museum Technicians perform hands-on tasks involved in the care and preservation of historic facilities and museum objects. The work requires a specialized knowledge of collections' practices, procedures, and materials. They typically:

- Clean art objects, furnishings, textiles, machinery, leather goods, paintings, statues, and other museum objects using the appropriate techniques.

- Inspect objects for changes in condition.
- Set up integrated pest management programs to monitor and control pests in exhibit and storage areas.
- Monitor and maintain proper climatic controls.
- Catalog museum objects.
- Conduct inventories of museum collections.
- Maintain object records, such as gift, loan, and transfer documents, inventories, condition reports, etc.
- Move objects to exhibit or storage locations.
- Package objects for shipment using appropriate curatorial methods.
- Help to prepare museum objects and natural history specimens for exhibit.

Museum Custodians

Under supervision, Museum Custodians contribute to the care and preservation of the Department's museum collections in their performance of routine housekeeping and preservation duties. Their work requires knowledge of specialized cleaning, handling, and maintenance techniques when working with objects of historical or artistic value. They typically:

- Perform routine housekeeping: Sweeping, mopping, waxing, vacuuming, and washing windows.
- Perform rodent and insect control. (Integrated Pest Management Program)
- Monitor temperature, relative humidity, and amount of ultraviolet and infrared light to which objects are exposed; follows plan to maintain proper ranges.
- Perform minor household maintenance (e.g., painting, plastering, and plumbing).
- Assist in planned programs for preserving historic or artistic objects.
- Assist with the installation of museum exhibits.

Museum Services Section

Museum Services Section is responsible for museum collection matters that require statewide direction or coordination. This responsibility includes policies and procedures relating to collection management, museum registration and computerization of records, statewide training, and administration of the Department's compliance with Public Law 101-601 (Native American Graves Protection and Repatriation Act of 1990). The section supervisor advises Department management on museum collection policies, personnel classification, budgeting, and long-range planning.

The Section publishes the Department's *Museum Collections Management Handbook*, *California State Parks Museum Directory* and provides assistance with other museum-related publications. Museum Services is responsible for drafting the Department's Operations Manual (DOM) chapter on museum collections management. In addition the section issues a periodic publication the *Museum Collection Manages Network Bulletin* as a means of communicating with field staff about museum collection policies, issues, training and professional development opportunities.

Museum Services Section staff are available by phone, e-mail, and on site (by prior arrangement) to assist with any of the above areas.

Statewide Museum Collections Records (SMCR)

Statewide Museum Collections Records is a repository, managed by Museum Services Section where copies of park museum collection records are maintained. Such paper records include accession documents such as *Deeds of Gift* and *Objects and Specimens Found On-Site* forms. It also includes activity forms such as *Incoming* and *Outgoing Loan* documents, *Park to Park Transfers*, *Authorizations for Extended Hands-on Use*, *Releases and Receipts of Object* forms, as well as deaccession documents, etc. SMCR provides a means of tracking and assessing collection activities on a statewide basis. Perhaps its most important function is that it serves as backup protection against the loss of records at a park.

The staff member who manages the repository is responsible for assigning new park registration location numbers when they are needed.

State Archaeological Collections Research Facility (SACRF)

The State Archaeological Collections Research Facility (SACRF) is the primary repository for more than one million objects derived from archaeological excavation, monitoring, and surveys conducted by the Department. These objects form the single most representative sample of material from archaeological sites found in the State of California. The SACRF actively works with scholars, researchers, and exhibit designers to afford every opportunity for these objects to be better understood both in their own right and in the context of the provenience where they were found.

The SACRF also manages the field records, maps, catalogues, and photographs associated with the excavations that produced the objects. A SACRF staff person is responsible for assigning accession numbers for all DPR archaeological collections.

The SACRF provides access to the collections through outreach programs to scholarly organizations and institutions, including loans for exhibitions, tours of the collections, school programs, web access to collections, and digital imaging.

State Museum Resource Center (SMRC)

The State Museum Resource Center (SMRC) in West Sacramento provides access, stewardship, security, and long-term curation for a collection of over two million objects, including art, ethnographic objects, documentary materials, cultural history, natural history, and photography. Since its inception in the mid-1960s, the SMRC has served as a repository for objects from other State Park units when appropriate space at the park units was not available. The SMRC provides assistance to park units for collection projects, exhibitions, and research. Access to objects in storage is provided to Department staff, researchers, Native American groups, and other members of the public by appointment.

The SMRC is the Department's repository for human remains and associated funerary objects subject to NAGPRA (Native American Graves Protections and Repatriation Act).

The SMRC also provides a variety of outreach programs, including loans for exhibitions, tours of the collections, school programs, web access to collections, and digital image reproductions.

Photographic Archives

The Department's statewide Photographic Archives, located in West Sacramento, is a repository for photographic materials in a variety of formats, including negatives, prints, slides, and electronic images. The collection emphasizes the history, resources, features, and uses of the State Park system and illustrates a broad range of California cultural and natural history subjects.

The Photographic Archives is a unit of the Interpretation and Education Division. Typically departmental staff request photographs for use in audio-visual programs, exhibits, and publications. Public requests for photographs are usually for use in video and film documentaries, books, magazines, and electronic media.

Northern Service Center

Park units in all field divisions — Northern, Central, and Southern — in need of assistance with museum collection matters may call upon the curators at the Northern Service Center for technical expertise, training, and support. Their services include the following:

- Conducting on-site evaluations of museum records and facilities that house museum objects. This includes the proper physical care of museum objects, such as structural environmental controls.
- Implementing Integrated Pest Management programs.
- Evaluating gift offers.
- Assisting with object registration.
- Advising on the interpretation of museum objects, including exhibit techniques.
- Evaluating and making recommendations on conservation treatments and assisting with conservation contracts.
- Advising on collection security.
- Entering museum records in the statewide museum collections database.
- Conducting inventories and cataloging museum collections at the park unit.
- Preparing Housekeeping Schedules that detail the tasks that should be completed, the staffing levels to conduct these tasks, and the supplies and equipment needed.
- Providing training to park staff and volunteers on various aspects of museum collections management.

- Preparing grant applications to fund museum collection management projects.
- Providing review of documents for Superintendent approval when requested by the Designated Collections Manager.
- Providing advice and support for districts and for development projects, including the preparation of project plans, personnel recommendations, and budgeting for museum collection needs.

FIGURES 1, 2, 3

Figure 1: Sample Letter Delegating Collection Management to Park Superintendent

Figure 2: Sample Letter Designating Museum Collection Managers

Figure 3: Sample Letter Designating Staff to Accept and Release Objects

State of California – The Resources Agency

Memorandum

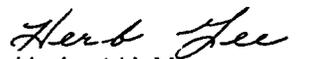
Date : September 13, 1998

To : Clayton R. Strong
Fabled Farm SHP

From : Department of Parks and Recreation
Herbert H. Yee
Great Valley District

Subject : Delegation for Museum Collection Management

Per *Department Operation Manual* Section 2010.1, I am delegating authority to you for all museum collection activities within your park. Please refer to Section 2020 of *DOM* for a description of signature authority and review levels for certain activities.


Herbert H. Yee
District Superintendent
Great Valley District

cc: Museum Services Section

Figure 1 — Sample Letter Delegating Collection Management to Park Superintendent

State of California – The Resources Agency

Memorandum

Date : January 14, 1999

To : Manuel Guevara
Ingrid Johnson
Christina Kudrina

From : Department of Parks and Recreation
Herbert H. Yee
Great Valley District

Subject : Designation of Collection Managers

Per DOM Section 2020.2.3, I am designating Museum Collection Managers for our District as follows:

Manuel Guevara
Lake Mirage SP
Carverville Packing House SHM

Ingrid Johnson
T. J. Blair Museum of Agricultural Machinery
Chavez -Huerta Visitor Center
California Orchards SP
Great Valley District Headquarters (storage)

Christina Kudrina
Fabled Farm SHP
Dyson Ranch SHP
Peter E. McGregor Nature Center


Herbert H. Yee
District Superintendent
Great Valley District

cc: Museum Services Section

**Figure 2 — Sample Letter Designating
Museum Collections Managers**

State of California – The Resources Agency

Memorandum

Date : August 16, 2001

To : Christina Kudrina
Prem Singh
Ramon Valencia
Henry Stegan

From : Department of Parks and Recreation
Clay R. Strong, Superintendent
Fabled Farm SHP

Subject : Accepting and Releasing Museum Objects

To ensure that museum objects coming into our custody and leaving our custody are properly documented and handled according to Department procedures, only the staff listed below are authorized to accept or release museum objects:

District-wide: Christina Kudrina, Museum Curator II
District-wide: Prem Singh, Museum Curator I
Fabled Farm SHP: Ramon Valencia, S.P. Ranger I
Dusty Johnson's Packing House: Henry Stegan, Museum Technician

If you are contacted by persons who have museum objects to donate, or persons who ask for the return of an artifact they had left with the park, please refer the matter to one of the persons listed above.



Clay R. Strong
Superintendent
Fabled Farm SHP

cc: Museum Services Section

**Figure 3 — Sample Letter Designating Staff
To Accept and Release Objects**

How To Use This Handbook

Organization: The Handbook is divided into two volumes: Volume I Basic References and Volume II Practices and Procedures.

Volume I is a compilation of resources for use by museum collections managers and others who care for collections. It includes reference materials such as personnel rosters, job specifications, pay scales, uniform requirements, sources for supplies, and bibliographies of books, periodicals, and related professional organizations.

Volume II describes the particular practices and procedures used in California State Parks for documenting, storing, caring for, and interpreting museum objects. There are three ways of locating information in Volume II.

Volume II: Finding a Topic

There are three ways of locating information in Volume II:

Table of Contents – lists chapter titles and the main subjects found in each chapter.

Chapter Divider Pages – are located at the front of each chapter and contain the chapter title, main subjects, and all subtopics found in a chapter.

Index – lists pertinent topics in alphabetical order and where to find them

Updates: Both volume I and volume II are formatted in such a way that they can be easily updated. To keep your *Handbook* current and useful, it is important that you remove old pages and replace them with new pages as soon as they are received.

Additional Copies: If you need additional copies, call Museum Services at (916) 653-8767; Fax at (916) 653-3398; e-mail at pmorr@parks.ca.gov; or write Museum Services Section, Cultural Resources Division, 1416 Ninth Street, Room 902, Sacramento, California 95814.

A Work in Progress: Please alert us if you find errors or have suggestions for future updates. (See address and phone number above.)

THE WORK ENVIRONMENT

Chapter 2 is on health and safety practices that pertain to museum staff in State Parks. It is not possible to anticipate every danger or cover every topic comprehensively. This chapter emphasizes the hazards that DPR employees are most likely to encounter when working with museum collections.

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Basic Health and Safety Practices

Introduction

This chapter describes the conditions and practices necessary for a safe and healthy museum work environment. If staff members are aware of potentially harmful materials and behaviors, and if they follow proper procedures and exercise common sense, most hazards can be avoided or mitigated.

In State Parks, museum personnel work in widely varying conditions from modern, climate-controlled offices to dusty, drafty old barns. Good health and safety measures should be practiced wherever museum staff is working. A safe and healthy work site for employees translates to safer and healthier conditions for the collections with which they work.

The Physical Space

The following factors should be taken into account when planning the physical area where curatorial work is to take place.

- Is the space well lit?
- Are the areas where staff works with objects away from direct sunlight?
- Is there adequate ventilation, free from drafts or excessive heat?
- Are the air conditioning filters changed on a regular basis?
- Is the storage and shelving suitable for the types of objects you are required to house?
- Are shelving and storage cabinets secured, so they are not a hazard?
- Is the building and equipment kept in good repair? For example: the tables upon which you place objects should be sturdy and stable.

- Is the space arranged to minimize the handling and movement of objects? Ideally, the areas for receiving, unpacking, examining, registering, photographing, storing, packing, and shipping objects are in close proximity to each other.
- Are there raised tables available that will allow staff to process collections without back strain?
- Are there fire extinguishers in the area of the appropriate type and number? Do employees know how to use them?
- Are all hazardous substances clearly labeled, sealed, and properly stored?
- Is a first aid box accessible? Is it up-to-date and is there at least one staff member with first aid training?
- Is there an emergency plan? Are there emergency contacts posted? Do employees know where to find various shut-off valves (i.e., gas, water, etc.)?

Safety Practices

Avoiding harm is infinitely better than recovering from it. The following is a list of basic safety practices to follow when you are working with museum objects. The list is divided into two parts: safety practices when you are handling objects and safety practices when you are moving objects.

When Handling Objects

- Never handle an object until you know it's safe to do so. If you think an object presents a health risk, wait until you can obtain appropriate safety equipment and/or handling advice before touching or moving it.
- Preplan all tasks.
- Good housekeeping is important. Keep work areas clean and free of dust, dirt, litter, and clutter.
- Do not smoke, eat, or drink while working with museum objects.

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- Know the nature of the materials (including packing materials) that you are working with.
 - While the area in which you are working should be well ventilated, care should be taken to prevent drafts and air currents that will raise particulates. Such care is especially important when handling objects that are friable (crumble easily), are dusty, or have pollens, charcoal, chalk, or loose pigments on them, or have biological or chemical hazards associated with them.
 - While in work and storage areas, do not carry or wear anything that may catch on things and cause damage to you or them. For example: purses, parcels, briefcases, coats, umbrellas, laptops, backpacks, jewelry, buttons, badges, even unsafe hairstyles. (Most State Park units should have lockers, offices, or other secured storage areas where such items may be placed.)

Wearing a lab coat also serves to protect your clothing from dust and artifacts from exposure to badges and buttons. Lab coats should be kept clean to avoid transferring dust and dirt and laundered separately from other clothing.

- Do not handle objects unnecessarily.
- Wear gloves that are appropriate for the materials with which you are working. (For information on types of gloves, see Gloves, under Protective Clothing and Equipment, this chapter, page 2.31.)
- Always wash your hands before and after handling or treating objects. Avoid touching the exterior surface of gloves when you take them off.
- In some circumstances, you may need to wear a dust mask or respirator to protect yourself against dust, biohazards, and/or allergens. If you wear a mask or respirator, you must have medical certification from a doctor. You must also have an up-to-date fit test for your device, as one size does not fit all. (For additional information, see Respirators in this chapter, page 2.33.)
- Never assume a firearm is unloaded. To make sure a gun is safe to handle have a staff member with a peace officer classification (e.g., Ranger) check it out. If no one on your staff is familiar with this type of weapon, you can also go to a local gun shop or request assistance from a local police officer.

For further information on the laws and regulations affecting the acquisition and storage of historic guns and ammunition, see Chapter 4, *Historic Firearms*, pages 4.5–4.10.

- Use all precautions when handling flammable, toxic, or sharp objects. (For further information, see *Types of Hazardous Materials*, this chapter, pages 2.7–2.30.)
- Exercise extreme caution if you have old medicine or chemical bottles or containers in your collection. The active ingredients of many of these materials can become even more potent over time. (For further information, see *Types of Hazardous Materials*, this chapter, pages 2.9–2.10.)
- Natural history mounts, Native American basketry, and other organic artifacts should be handled with care, as they may have been treated with arsenic or other biocides. If you do not have any information on the treatments applied to such artifacts, you should assume that hazardous pesticides are present. It is advisable to use nitrile gloves and a mask and to handle such artifacts as little as possible.

When Moving Objects

- Eliminate unnecessary movement of objects. Know exactly where an object is to be placed before moving it. Reducing the number of motions reduces the risk of damage.
- If you are moving an object to another building, coordinate the move with all staff members involved. Make sure the receiving area is prepared before the move begins.
- Be aware of the space and the conditions around you. Danger is increased by low ceilings, narrow doorways, changes in floor surfaces, as well as by the presence of dust, light levels, extremes in temperature, or relative humidity.
- Examine the structural composition of the objects you are moving and their weak and strong elements. Handles, rims, and spouts are usually the weakest point on any object.
- Always use both hands when carrying an object.

- Avoid haste when handling or moving museum objects.
- Do not hand objects from one person to another. Instead place the object on a table and then have the other person pick it up.
- Never carry more than one object in your hands.
- Avoid conversation when moving objects.
- Use a box when carrying several lightweight objects. Separate each piece within the box. Never overcrowd a box or put heavy objects on top of light objects.
- The danger in moving any object is increased by unusual size or shape and heavy weight. Each large, awkward, or heavy object should be treated as a special problem. Two or more people should help in moving this type of object. Know the correct method of lifting in order to avoid back injuries. Consider using a dolly or hand truck.
- When using dollies or carts to transport objects:
 - Do not overload the shelves or let objects protrude from the sides.
 - Do not place objects of different weights and sizes together.
 - Avoid letting an object protrude beyond a carrying box or hand truck.
 - Check door sizes, elevator sizes, and ceiling heights before moving large objects.
 - Anticipate raised doorsills or curbs.
 - Watch out for door and cabinet handles, desk and shelving corners.
 - Use two people to maneuver a cart between buildings.
 - Drive slowly and carefully; avoid quick stops.
- Do not carry a painting by the top of its frame or stretcher. Place one hand beneath the painting and one hand at the side of the painting. If a painting is large, use more than one person to move it.

- Remove or secure all loose pieces before moving pieces of furniture. Mirrors, marble tops, and unlocked drawers and doors should be removed or secured with straps.
- Do not push furniture across a floor.
- Never push anything across a rug.
- Do not lift objects up and over other objects.
- If possible, establish a “receiving area” where museum and archival materials are regularly delivered before they are moved to an exhibit, storage, or work area.

Health and Safety Training

Everyone including volunteers should be trained in health and safety practices when they begin to work with museum collections. Periodic safety training is important even for experienced personnel. Refresher sessions should be given prior to the start of a large project to be aware of the most likely hazards involved in the project and to review safety precautions.

Further Information

If you have questions about any of the topics discussed in this chapter or need further information, contact Museum Services Section.

Types of Hazardous Materials

Introduction

Most hazardous materials in a museum environment fall into the categories listed below. Under each heading are examples of museum objects, followed by recommendations for handling the objects and locating expert assistance. Keep in mind that contaminants can be in packing materials or in/on the objects themselves.

Flammables and Explosives

- Loaded firearms.
- Boxes of ammunition (The older the ammunition is, the more sensitive.)
- Fireworks
- Boxes of matches
- Powder flasks
- Historic fire extinguishers
- Mining explosives (e.g., blasting caps, black powder, dynamite, fuses, etc.)
- Cellulose nitrate negatives (celluloid), especially reels of film stored in metal cans
- Cellulose nitrate artifacts that look like ivory or tortoise shell

Recommended Action: If you come across gun shells, cannon balls, booby traps, grenades or other explosive weapons or devices, contact the police department regarding disposal and/or deactivation. Be aware that such items from archeological sites may be unrecognizable.

Cellulose nitrate negatives and film will become sticky to the touch and emit a distinctive odor before they reach the combustible stage. They should be stored at a low temperature and separate from other collections. The negatives should be separated from each other on appropriate sleeves. For further information about the care and storage of cellulose nitrate negatives and film, as well as other objects composed of celluloid, contact Museum Services Section.

Asbestos

- Minerals (crocidite, tremolite).
- Papier-maché artifacts.
- Stuffing from taxidermy specimens.
- Textiles treated with flame-proofing.
- Old safes where asbestos has been used in liners for fireproofing.
- Old heating elements (e.g., old heater burner pads).
- Old lead wire where asbestos has been used for wrapping the wire.

Recommended Action: There is no safe level of exposure to asbestos. Many collections include the most harmful form of asbestos – tiny fibers that can be inhaled. Contact the Environmental Protection Agency (EPA) to obtain the names of licensed contractors who specialize in asbestos detection and removal.

Radioactive Materials

- Mineral samples and some fossils that contain naturally occurring radioactive elements such as uranium or thorium.
- Radon gas from decaying minerals in geology collections.
- Some glassware, such as green depression glassware and vaseline glass, contain radioactive materials.
- Watch and instrument dials painted with radium.

Recommended Action: The above list is a sampling of specimens and artifacts that are known to be radioactive or contain radioactive material in them. The precautions for handling such materials are the same as for other potentially hazardous objects in a museum collection: Limit handling to the shortest duration. Wear gloves and a lab coat; hands should be washed after handling. It is important to avoid ingesting and inhaling dust from specimens or artifacts that may have radioactive materials in them. No food or beverages should be consumed in the work area. If work procedures generate dust, respiratory protection is recommended.

One difficulty is knowing whether items in your collection present a health hazard to staff or visitors from exposure to radioactivity. If you have one or more items in your collection that you are concerned about, then you should have them assessed. There are local contractors who can assess your collection and advise you on proper storage or disposal measures. You can also contact the State Department of Health Services, Radiologic Health Branch (RHB) in Sacramento at (916) 445-0931. That office can advise you on the location of the nearest regional RHB office that can send someone out to determine if the item(s) is radioactive and if it's a health and safety concern. With regard to radon and radon monitoring, you should contact the Environmental Protection Agency (EPA).

Some curatorial personnel may choose to purchase a Geiger counter and periodically monitor storage areas and collections themselves. However, the disposal of radioactive materials is subject to complex regulations. Consequently, it is advisable to obtain expert help.

Poisons

- Taxidermy collections and their mounts.
- Some ethnographic collections.
- Some metal artifacts.
- Some textiles.
- Painted canvases.
- Picture frames.
- Basketry.
- Old medical/surgical equipment.
- Old pharmacy collections.

- Old chemistry sets.
- Mercury flasks.
- Cyanide drums.
- Herbarium collections.

Recommended Action: Arsenic, mercury compounds, and other chemicals were once commonly used to preserve some ethnographic artifacts and taxidermy specimens. Collections subject to NAGPRA should be handled with appropriate precautions. Cyanide residues from old plating and cleaning procedures can be found on some copper, silver, and gold artifacts. Lead can be found in paints, gesso, plasters, and putty. Contact a conservator or Museum Services Section for help.

If you encounter medical, pharmacy, and chemical collections and the bottles or containers are clearly labeled, you may be able to contact a local pharmacist who can tell you if these items change chemically over time and/or if they are hazardous. If you encounter a bottle or container with a substance in it that you can't identify, you may need to have the material analyzed by a local laboratory (try the Yellow Pages under "laboratories analytical") to determine what the substance is and how to dispose of it properly.

Biological Hazards (Pathogens)

- Artifacts acquired from latrines, middens (refuse deposits), and graves.
- Objects in storage areas contaminated with bird, bat, or rodent droppings or excrement from other types of animals.
- Objects that can cause puncture wounds.
- Objects stored in damp, dusty or otherwise substandard storage conditions.

Recommended Action: Pathogens are bacteria or viruses that can cause diseases such as rabies, tetanus, hantavirus, valley fever, etc. Molds and fungi that cause illnesses are also considered pathogens. Fortunately, most pathogens may not survive long under normal museum conditions.

Always wear gloves and protective clothing. Wash your hands after handling artifacts in these conditions. Avoid stirring up dust. Wear a respirator or a mask to avoid breathing in dust polluted with animal droppings, molds, and fungi.

Collections care personnel should take special precautions when handling artifacts from latrines, middens, and graves that may have been in contact with fecal material, parasites, and corpses. Such artifacts should be thoroughly cleaned before putting them into storage. Fumigants and insecticides may be useless against some pathogenic microorganisms. Freezing contaminated objects may preserve some pathogens.

If for any reason you think that the objects that have been unearthed are Native American, you should refer to the section in this handbook on NAGPRA (Native American Graves Protection and Repatriation Act). This section contains information on what to do if Native American remains or burial items are found in a park unit. See Chapter 4, pages 4.19–4.24.

Museum and archeological personnel may be exposed to certain diseases due to the nature and/or circumstances of their work. Such diseases include the following:

Lyme disease is a bacterial infection contracted through the bite of the western black-legged tick.

Hantavirus is a virus which infects people who inhale airborne particles of urine, droppings or saliva from infected rodents.

Valley fever is an infection which primarily affects the lungs, caused by breathing dust and soils contaminated with a particular fungus.

Histoplasmosis is contracted from contact with bird, chicken, or bat droppings or recently disturbed contaminated soil.

See the attachments (Figures 4, 5, 6, 7) located at the end of this section for further information on these diseases and measures to avoid exposure to them.

Biological Hazards (Fauna)

- Spiders
- Ticks
- Insects
- Poisonous snakes

Recommended Action: In general to prevent bites from spiders, insects, and snakes, work in a well-lighted area. Wear gloves and protective clothing. Exercise caution in moving objects and boxes that have not been disturbed for a long time.

People who spend time in brushy and wooded areas are at increased risk of exposure to ticks that can transmit diseases when they bite. When working in areas likely to be infested with ticks, wear long sleeves and long pants tucked into socks. Wear a hat with hair tied back. Use insecticides to kill or repel ticks. After outdoor activities, inspect carefully for ticks. Remove any attached ticks promptly.

Certain ticks are carriers of a serious bacterial infection called Lyme disease. First discovered in 1975, reports of this disease have increased substantially in recent years. See Figure 4 for further information and preventive measures.

LYME DISEASE FACTS

(FIGURE 4)

Source:

Developed by the Association of State and Territorial Directors of Health Promotion and Public Health Education with funding from the National Center for Infectious Diseases of the US Center for Disease Control and Prevention under Cooperative Agreement U50/CCU 12359. For copies visit www.astdhpphe.org.



Lyme Disease

- Lyme disease is a rapidly emerging bacterial infection that is spread to people by the bite of infected ticks.
- Lyme disease can cause a rash, flu-like symptoms, and aching joints.
- Lyme disease can be treated with antibiotics. Without treatment, Lyme disease can cause serious, long-term health problems.
- To prevent Lyme disease: 1) protect yourself from tick bites, 2) remove attached ticks promptly, and 3) get early diagnosis and treatment.

What is Lyme disease?

Lyme disease is an infection transmitted by the bite of certain, very small, infected ticks. Lyme disease gets its name from the town of Lyme, Connecticut, where the illness was first identified in the United States in 1975.

What is the infectious agent that causes Lyme disease?

Lyme disease is caused by a corkscrew-shaped bacterium, or spirochete, called *Borrelia burgdorferi*. Ticks infected with the bacterium spread the disease to humans.

Where is Lyme disease found?

Cases of Lyme disease have been reported by nearly every state in the United States, but the disease is concentrated in the east coastal states, the north central states, and northern California. Connecticut, Rhode Island, New York, New Jersey, Delaware, Pennsylvania, Maryland, and Wisconsin account for about 90% of all cases.

In the Northeast and Great Lakes region, Lyme disease is spread by the black-legged tick, which lives in wooded areas, grasslands, and yards. In the Pacific Northwest, the disease is spread by the western black-legged tick. In the Southeast, the disease is thought to be spread by the black-legged tick.

How do people get Lyme disease?

Ticks become infected with the Lyme disease bacterium by feeding on infected animals, such as mice, chipmunks, and other wild rodents. Lyme disease is passed to humans and other animals when a tick infected with the bacterium bites the person or animal and stays attached long enough (usually more

than 36 hours) to take a blood meal.

The tick that spreads Lyme disease has a 2-year life cycle, and feeds once in each of its three life stages - larva, nymph, and adult. In the tick's larva stage, it is tan, the size of a pinhead, and feeds on small animals like mice. During the nymph stage, the tick is the size of a poppy seed, beige or partially transparent, and feeds on larger animals such as cats, dogs, and humans. Adult ticks are black and/or reddish and feed on large mammals such as deer, dogs, and humans.

What are the signs and symptoms of Lyme disease?

The early stage of Lyme disease is usually marked by one or more of these signs and symptoms:

- Tiredness
- Chills and fever
- Headache
- Muscle and/or joint pain
- Swollen lymph glands
- A characteristic skin rash, called *erythema migrans*

The skin rash is a red circular patch about 2 inches in diameter that appears and expands around the site of the tick bite. The center may clear as it enlarges, resulting in a "bull's-eye" appearance. The rash may be warm, but it usually is not painful or itchy.

Some infected people do not recognize the early symptoms and are diagnosed only after complications occur.

What complications can result from Lyme disease?

Persons who did not have or did not recognize the early symptoms and who did not receive treatment can end up with serious complications:

- Arthritis (swelling and pain) in the large joints, which can recur over many years
- Nervous system problems, such as numbness, meningitis (fever, stiff neck, and severe headache), and Bell's palsy (paralysis of the facial muscles, usually on one side)
- Irregularities of the heart rhythm

How soon after exposure do symptoms appear?

Early symptoms can develop within a week to a few weeks of the tick bite. Other symptoms can appear weeks, months, or years later.

How is Lyme disease diagnosed?

Lyme disease is diagnosed by a physical examination and medical history. The clinical diagnosis is supported by laboratory testing.

Diagnosis of Lyme disease can be difficult. Current tests are not completely accurate, and the symptoms can mimic those of other diseases. Diagnosis is easiest when there is a skin rash.

Who is at risk for Lyme disease?

Lyme disease can affect anyone. Persons who spend time in brushy and wooded areas are at increased risk of exposure. The chances of being bitten by a tick are greatest during times of the year when ticks are most active. Deer ticks in the nymph stage are active from mid-May to mid-August. Adult ticks are most active in mid- to late fall and early spring.

What is the treatment for Lyme disease?

Lyme disease is treatable with antibiotics taken for 3 to 4 weeks. More difficult cases may require longer treatment and combinations of drugs. Re-infection from tick bites is possible after treatment.

How common is Lyme disease?

Lyme disease is the most common disease spread by ticks in the United States. More than 16,000 cases were reported by 45 states in 1996. However, because of considerable under-reporting and misdiagnosis, the actual number of cases is probably several times higher.

Is Lyme disease an emerging infectious disease?

Yes. Lyme disease is a rapidly emerging infectious disease. Since it was first recognized in the United States in 1975, reports of Lyme disease have increased substantially, and the disease is now found in several regions of the country. Factors contributing to the rise in Lyme disease in humans is a thriving tick population and the expansion of suburbs into formerly wooded areas, which increases people's exposure to infected ticks.

How can Lyme disease be prevented?

A Lyme disease vaccine is under development but is not yet available. The only sure way to prevent the disease is to avoid exposure to infected ticks. Especially avoid areas where wild mice might live, such as the edges of yards, fields, and woods with low, dense groundcover.

If this is not possible, you can reduce your risk by taking these precautions:

- During outside activities, wear long sleeves and long pants tucked into socks. Wear a hat, and tie hair back.
- Use insecticides to repel or kill ticks. Repellents containing the compound DEET can be used on exposed skin except for the face, but they do not kill ticks and are not 100% effective in discouraging ticks from biting. Products containing permethrin kill ticks, but they cannot be used on the skin -- only on clothing. When using any of these chemicals, follow label directions carefully. Be especially cautious when using them on children.
- After outdoor activities, check yourself for ticks, and have a "buddy" check you, too. Check body areas where ticks are commonly found: behind the knees, between the fingers and toes, under the arms, in and behind the ears, and on the neck, hairline, and top of the head. Check places where clothing presses on the skin.
- Remove attached ticks promptly. Removing a tick before it has been attached for more than 24 hours greatly reduces the risk of infection. Use tweezers, and grab as closely to the skin as possible. Do not try to remove ticks by squeezing them, coating them with petroleum jelly, or burning them with a match.
- Large brown ticks that are commonly found on dogs and cattle do not carry the Lyme disease bacterium. If you remove a very small tick and want to have it tested for Lyme disease, place it in a clean pill vial or tight-sealed plastic storage bag with a moistened cotton swab. Contact your health-care provider and local health department.

This fact sheet is for information only and is not meant to be used for self-diagnosis or as a substitute for consultation with a health-care provider. If you have any questions about the disease described above, consult a health-care provider.

 [Return to Infectious Facts Index](#)

 [Return to ASTDHPPHE Main Page](#)

HANTAVIRUS PUBLIC HEALTH FACT SHEET

(FIGURE 5)

**Courtesy of the California Department of Health Services
Institutions Program**



California Department of Health Services Institutions Program

Public Health Fact Sheet

Hantavirus pulmonary syndrome

What Hantavirus pulmonary syndrome?

Hantavirus pulmonary syndrome is a rare, but often fatal, disease of the respiratory system caused by a virus transmitted to humans through the urine, feces and saliva of wild rodents.

Who gets Hantavirus Pulmonary syndrome?

Anyone of any age can become infected with Hantavirus. A number of the cases reported were individuals in excellent physical condition.

How is it spread?

The disease is transmitted to humans through the urine, feces, and saliva of wild rodents primarily the deer mouse but not necessarily limited to that species. The most widely reported conditions associated with the transmission of the disease is cleaning or occupying confined spaces lacking adequate ventilation that are heavily infested with rodents. Also, direct contact with rodents (bites, saliva) has been implicated in the transmission of the disease.

What are the symptoms?

The illness starts with flu like symptoms, including fever, headache, muscle ache, and vomiting or diarrhea. After the first phase of the disease, shortness of breath and coughing usually appear. In a significant number of cases the disease progresses rapidly to respiratory failure and death. Symptoms usually appear one to five weeks after exposure to the rodents.

What is the treatment?

There is no specific cure for the disease. The course of treatment is usually supportive, attempting to maintain the respiratory system while the body's immune system attempts to fight off the virus.

What can I do to prevent infection?

Good sanitation is the key to preventing and controlling rodent infestations. Measures you should undertake include:

1. **Rodentproof** – Thoroughly inspect exterior of structures for any openings or spaces that would allow rodent entry. Typical routes of entry include poorly sealed crawl spaces, areas where piping and wiring enter buildings, and doors that fit poorly. One-quarter inch openings will allow rodent entry. Access to roofs should be prevented by trimming back foliage and removing or modifying any other means of access. Roofs should be inspected for signs of rodent activity or damage in such areas as overlapping rooflines. Openings should be sealed with steel wool, metal flashing, or concrete. Deteriorated foundations should be properly repaired.
2. **Cleaning** – Keeping structures clean, especially in food services areas goes a long way toward controlling rodent problems. Rodents will be discouraged from occupying structures unless there is a source of food and water. Cleaning to remove food sources and storing food in rodent-proof containers or six inches above the ground is a very effective means of discouraging these pests. Also all areas of buildings should be inspected to locate problem areas and appropriate action taken to discourage rodents.
3. **Physical and chemical control** – Traps, glueboards, and EPA approved rodenticides should be used continuously to kill rodents. Constant monitoring is essential for maintaining control. Gloves should be used when removing dead rodents.
4. **Outdoors** – Clear brush, grass, and junk away from the building foundations to eliminate a source of nesting material.

Safety precautions for cleanup

Remember that hantavirus is transmitted primarily by inhalation of dust contaminated with virus from rodent secretions. Therefore, it is very important not to disturb and stir up materials into the air while cleaning. Taking the following safety precautions will reduce the risk of infection from cleanup:

1. Ventilate the area to be cleaned the night before by opening doors and windows.
2. Use rubber gloves.
3. Use sanitizers such as bleach at maximum recommended concentrations to dead rodents, rodent droppings, nests, contaminated traps, and surrounding area and allow 15 minutes contact time before removal.

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4. Clean the affected area with a sponge or mop. DO NOT SWEEP OR VACUUM.
5. Double bag the disinfectant – soaked rodent and cleanup materials (newspaper, paper towels, etc.) securely in plastic bags and seal.
6. Wash gloved hands in disinfectant and then in soap and water. Thoroughly wash hands with soap and water after removing the gloves. Dispose of gloves and cleanup material with other household waste.

How can I get more information?

Contact the Department of Health Services, Institutions Program at (916) 445-0498 or visit the website at: <http://www.dhs.cahwnet.gov> or the U.S. Centers for Disease Control at <http://www.cdc.gov/>

VALLEY FEVER FACTS

(FIGURE 6)

Source:

Developed by the Association of State and Territorial Directors of Health Promotion and Public Health Education with funding from the National Center for Infectious Diseases of the US Center for Disease Control and Prevention under Cooperative Agreement U50/CCU 12359. For copies visit www.astdhpphe.org.



Valley Fever

- Valley fever is an emerging and sometimes deadly fungus infection.
- The valley fever fungus lives in soil and is spread through the air.
- Farmers, construction workers, and others who engage in activities that disturb the soil are at highest risk for valley fever. People with weak immune systems and persons of certain racial groups can become seriously ill from the infection.
- Valley fever is treatable with fungus-killing medicines.
- Persons at risk for valley fever should avoid exposure to dust and dry soil in areas where valley fever is common.

What is valley fever?

Valley fever is another name for the sometimes deadly infection coccidioidomycosis. It is called valley fever because the organism that causes it is commonly found in the soil of the southwestern United States, Mexico, and parts of Central and South America.

Valley fever usually affects the lungs. When it affects other parts of the body, it is called disseminated valley fever.

What is the infectious agent that causes valley fever?

Valley fever is caused by *Coccidioides immitis*, a fungus. The fungus produces spores that can be inhaled when they get into the air. Spores are hardy forms of the fungus that can live for a long time in harsh environmental conditions such as heat, cold, and drought.

Where is valley fever found?

The valley fever fungus grows naturally in soil in the southwestern United States and in parts of Central and South America.

How do people get valley fever?

Valley fever is spread through the air. If soil containing the valley fever fungus is disturbed by construction, natural disasters, or wind, the fungus spores get into the air. People can breathe in the spores and get valley fever. The disease is not spread from person to person.

What are the signs and symptoms of valley fever?

About 60% of infected persons have no symptoms. The rest develop flu-like symptoms that can last for a month and tiredness that can sometimes last for longer than a few weeks. A small percentage of infected persons (<1%) can develop disease that spreads outside the lungs to the brain, bone, and skin (disseminated disease). Without proper treatment, valley fever can lead to severe pneumonia, meningitis, and even death.

How is valley fever diagnosed?

Valley fever is diagnosed with a blood test or culture.

Who is at risk for valley fever?

Anyone can get valley fever, but people who engage in activities that disturb the soil are at increased risk. They include:

- Farmers
- Construction workers
- Military personnel
- Archaeologists

People with weakened immune systems are at increased risk for disseminated disease. HIV infection, as well as medical advances like chemotherapy and organ transplants, cripple the immune system and weaken resistance to fungus infections. Others at increased risk for disseminated disease are: elderly persons, African-Americans, Asians, and women in the third trimester of pregnancy.

What is the treatment for valley fever?

Valley fever can usually be treated with fungus-killing medicines.

How common is valley fever?

An estimated 50,000 to 100,000 persons develop symptoms of valley fever each year in the United States, with 35,000 new infections per year in California alone. In Arizona, the incidence of reported cases was 15 per 100,000 in 1995.

Is valley fever an emerging infectious disease?

Yes. Valley fever is on the rise because of the growing number of people who are moving to areas where the disease is common (such as Arizona) and increases in the number of persons with weakened immune systems.

Recent natural disasters have also triggered a rise in valley fever cases. The central valley of Southern California had a 4-year epidemic of valley fever in the early 1990s after a severe drought. Cases of valley fever also increased in persons exposed to billowing dust released by the January 1994 earthquake in Northridge, California.

How can valley fever be prevented?

There is no vaccine against valley fever. Persons at risk for valley fever should avoid exposure to dust and dry soil in areas where valley fever is common.

This fact sheet is for information only and is not meant to be used for self-diagnosis or as a substitute for consultation with a health-care provider. If you have any questions about the disease described above or think that you might have a fungus infection, consult a health-care provider.

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 [Return to ASTDHPPHE Main Page](#)

HISTOPLASMOSIS FACTS

(FIGURE 7)

Source:

Developed by the Association of State and Territorial Directors of Health Promotion and Public Health Education with funding from the National Center for Infectious Diseases of the US Center for Disease Control and Prevention under Cooperative Agreement U50/CCU 12359. For copies visit www.astdhpphe.org.



Histoplasmosis

- Histoplasmosis [his-toh-plaz-MOH-sis] is a fungal infection that varies in symptoms and seriousness.
- Histoplasmosis usually affects the lungs and causes a short-term, treatable lung infection. When it affects other parts of the body, it is called disseminated histoplasmosis. Disseminated histoplasmosis can be fatal.
- The histoplasmosis fungus lives in soil, especially soil that is enriched with bat or bird droppings.
- People get histoplasmosis when they breathe in dust that contains the fungus.
- Histoplasmosis is treatable with fungus-killing medicines.
- To prevent histoplasmosis: 1) avoid exposure to dust from soil that might be contaminated with bat or bird droppings, and 2) avoid disturbing accumulations of bat or bird droppings.

What is histoplasmosis?

Histoplasmosis is an infection that varies in symptoms and seriousness. It usually affects the lungs. When it affects other parts of the body, it is called disseminated histoplasmosis.

What is the infectious agent that causes histoplasmosis?

Histoplasmosis is caused by *Histoplasma capsulatum*, a fungus. The fungus produces spores that can be inhaled when they get into the air. Spores are hardy forms of the fungus that can live in the environment for a long time.

Where is histoplasmosis found?

The histoplasmosis fungus is found throughout the world. The fungus grows naturally in soil in some areas of the United States, mostly in the midwestern and southeastern states and along the Ohio and Mississippi River valleys. It thrives in soil that is enriched with bat or bird droppings.

How do people get histoplasmosis?

Histoplasmosis is spread through the air. If soil containing the histoplasmosis fungus is disturbed, the fungus spores get into the air. People can breathe in the spores and get histoplasmosis. The disease is not spread from person to person.

What are the signs and symptoms of histoplasmosis?

Most infected persons have no symptoms. When symptoms occur, they vary widely, depending on the form of the disease.

The lung infection can be short-term (acute) and relatively mild, or it can be long-term (chronic) and serious. Symptoms of the acute lung infection are tiredness, fever, chills, chest pains, and a dry cough. The chronic lung infection is like tuberculosis and occurs mostly in persons who already have lung disease. It can progress over months or years and can scar the lungs.

Disseminated histoplasmosis results in a variety of serious symptoms and can involve all body organs. The liver and spleen usually become enlarged, and sores in the mouth or gastrointestinal tract can develop. Disseminated histoplasmosis can be fatal.

How soon after exposure do symptoms appear?

Symptoms of acute disease usually appear in 5 to 18 days (usually 10 days) after exposure.

How is histoplasmosis diagnosed?

Diagnosis can be made by laboratory culture or a blood test. A skin test is available but is useful only for outbreak investigations, not for diagnosis.

Who is at risk for histoplasmosis?

Anyone can get histoplasmosis. Chronic lung infections are more common in males than in females, and particularly in persons with chronic lung disease. Disseminated histoplasmosis occurs most often in infants, young children, and persons with weakened immune systems, such as those with cancer or HIV infection.

What complications can result from histoplasmosis?

Acute histoplasmosis can keep getting worse or can become chronic. Acute histoplasmosis can also spread from the lungs to other organs and lead to the disseminated form of the disease, especially in persons with weakened immune systems.

What is the treatment for histoplasmosis?

Persons with mild disease usually get better on their own. Severe cases of acute histoplasmosis and all cases of chronic and disseminated disease are treated with fungus-killing medicines.

How common is histoplasmosis?

Infection with histoplasmosis is common, but the disease is rare. As many as 80 percent of persons living in U.S. areas where the fungus is common have a positive skin test, meaning they have had the infection in the past. However, most of these people do not have a history of histoplasmosis symptoms.

Is histoplasmosis an emerging infectious disease?

Yes. Histoplasmosis is on the rise, mainly because of the growing number of persons with weakened immune systems. These include persons with HIV infection, those who have had a bone marrow or organ transplant, and those receiving chemotherapy for cancer.

How can histoplasmosis be prevented?

- It is not practical to test or decontaminate all areas that are known to be or might be contaminated with the histoplasmosis fungus, but these steps can reduce the risk of exposure:
- Avoid areas where the fungus might be growing, especially areas with accumulations of bird or bat droppings. The fungus often grows around old chicken houses, in caves and other areas where bats live, and around starling and blackbird roosts.
- Avoid disturbing accumulations of bat or bird droppings, and minimize exposure to dust in potentially contaminated sites. Before stirring up the soil, spray the area with a mist of water.
- When working in high-risk areas, wear disposable clothing and a dust mask that covers the nose and mouth.

This fact sheet is for information only and is not meant to be used for self-diagnosis or as a substitute for consultation with a health-care provider. If you have any questions about the disease described above or think that you might have a fungus infection, consult a health-care provider.

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Protective Clothing and Equipment

Introduction

Some museum hazards are subtle and it is common for staff working with collections not to be aware that they have been exposed to dangerous substances. The use of protective clothing is the first line of defense against exposure to dangerous substances and should be worn when working with collections. Protective clothing also minimizes the possibility of damage to objects from jewelry, pens, pencils, buttons and belt buckles on a person's clothing.

Most protective clothing and equipment can be purchased at hardware and drug stores or conservation supplies companies. See the MCMH Volume I, Sources for Museum Supplies.

Clothing

Smock or coveralls

Smocks or coveralls serve as a protection for both the clothing of staff who work with museum objects and the objects with which they work. Smocks and coveralls that are worn while working with collections should be washed separately from other garments on a regular basis. This practice reduces the danger of exposing other clothing to toxic substances.

Gloves

Gloves are usually worn when handling museum objects. They protect objects from acids and oils on the skin and fingerprints. They can protect the wearer from contaminants, skin irritation, and soiling caused by substances in or on the objects.

It is important to choose the right glove for use with a particular type of object in a particular situation. Staff safety, object protection, cost, comfort and maintenance are factors used in determining which gloves are best to use and when.

Types of gloves to consider include:

Nitrile: Lightweight rubber. Similar in appearance to vinyl and latex. Provides excellent resistance to many solvents and hazardous materials.

Cotton: White, lightweight, soft, ambidextrous and slightly stretchable. Usually have a non-finished cuff, a less distinguished thumb, provide a less-sensitive touch, soil easily, tend to lint, snag, lose shape, and shrink after washing. Work well when worn under latex gloves to absorb moisture. Traditional cotton or nylon gloves that can trap contaminants in their fibers are of little use against poisonous or infectious artifacts.

Deluxe cotton: White, heavyweight, seamed, soft, comfortable, more durable with a finished cuff. Fit better, hold shape after washing but provide more sensitivity. Available in three sizes.

Non-slip cotton: White, seamed, comfortable, minimal lint with a finished cuff. Small PVC dots on palm and inner finger surfaces provide a good grip. Less touch sensitivity. Available in three sizes.

Nylon: White, seamed, ambidextrous, comfortable, and lintless. Available with or without a finished cuff; wash better than cotton gloves. Reduced touch sensitivity, slippery, and prone to developing pills after extended use.

Copolymer: Lightweight polyethylene plastic, ambidextrous, seamed, economical, and easy to remove. Fit poorly, are slippery, have a static charge, provide poor dexterity, and can be uncomfortable as hands sweat.

Vinyl: Available in various weights, vinyl provides a close fit and good sensitivity. Available in ambidextrous and hand-specific and powdered and non-powdered styles. Economical.

Latex: Many varieties available. Available in a variety of weights. Provides a close fit and good sensitivity. Can be ambidextrous or hand-specific. Can be powdered or not. Economical.

Note: Be aware that some people are seriously allergic to latex products. "Vinyl" is often used to describe many types of plastic, most of which are not appropriate for use with museum objects. "Vinyl" and "latex" are often used interchangeably so you might have to check with manufacturer for clarification.

Equipment

Respirators

Respirators are the best defense against inhaling hazardous dusts, vapors, fumes or gases. However, an employee must first undergo a physical exam to verify the ability to breathe through a respirator with no risk to his/her health. The law also requires that employees be fit tested and trained before using respirators to learn how to select, put on, take off, and maintain them. Most respirators can't be worn with facial hair, and if you wear glasses you may require a special type to get a good fit. Keep in mind that different types of filters capture different types of particulates. A filter designed to trap silica may not protect a person from solvent vapors. Check the appropriate Material Safety Data Sheet for the type of respirator needed.

There are two main types of respirators:

- Air purifying (i.e., simple dust masks and canister-type gas masks.) They block harmful particulates from getting into your lungs.
- Air supplying (i.e. Self-Contained Breathing Apparatus (SCBA) and airline respirators that provide air from a tank or compressor.) These devices are used when there is too little oxygen or when greater protection is needed.

For additional information specifically relating to the use of respirators by State Park employees, refer to DPR's *Respiratory Protection Handbook*, published in January 1995, and to DPR Operations Manual (DOM), Chapter 8 Hazardous Materials.

Eye protection:

Occasionally, it is necessary to protect one's eyes when working with collections. You may need protection from fumes or particulates. The most common types of eye protection are as follows:

- Shatterproof safety glasses
- Goggles
- Face shields.

If you wear prescription glasses you must have gear that corrects your vision or that can be worn over your glasses.

Material Safety Data Sheets (MSDS)

MSDS Forms

In the course of your work, you or other curatorial staff may occasionally be exposed to potentially hazardous chemicals. The barrier coats you use to mark objects, for example may fall into this category. State law mandates that manufacturers or local vendors automatically provide MSDS forms for new purchases of toxic materials. In turn, DPR is required to make MSDS forms (and related training, as necessary) available to employees assigned to work with hazardous substances. If volunteers are involved in cataloging or other activities during which they are exposed to dangerous substances, they also must have access to the forms and any related training.

MSDS forms include topics such as these:

- Ingredients by chemical name.
- Emergency treatment procedures.
- Potential health effects.
- First aid measures.
- Handling and storage recommendations.
- Personal protection measures.
- Disposal considerations.

A sample MSDS form (Figure 8) is located at the end of this section. You will need to obtain your own sheets since the information is updated periodically and the products themselves may vary from manufacturer to manufacturer. MSDS forms for many chemicals may be obtained online at www.emscience.com.

For additional information, refer to DAM, Chapter 1200 Employee Safety, and Sections 1240.4 and 1240.5. Park unit Maintenance chiefs or HAZMAT (Hazardous Materials) Coordinators may also be able to provide information.

Material Data Safety Sheet (MSDS)

Acetone

(FIGURE 8)

Source: Website for EM Science, a division of EM Industries, Inc.
www.emscience.com

MATERIAL SAFETY DATA SHEET (MSDS)

MATERIAL SAFETY DATA SHEET

EM SCIENCE

1. CHEMICAL PRODUCT AND COMPANY IDENTIFICATION

Manufacturer.....:	Preparation Date.: 10/24/00
EM SCIENCE	
A Division of EM Industries	Information Phone Number.: 856-423-6300
P.O. Box 70	Hours: Mon. to Fri. 8:30-5
480 Democrat Road	Chemtrec Emergency Number: 800-424-9300
Gibbstown, N.J. 08027	Hours: 24 hrs a day

Catalog Number(s):

AX0110 AX0115 AX0116 AX0118 AX0120 AX0125 AX0115P
 AX0120S AX0120T AX0126 AX0120P AX0114 0000278D 64752
 AX0121 AX0122 AX0116P 1.00038 1.16714 VW5791 1.00024
 933914030 AX0115PH

Product Name:

Acetone

Synonyms:

Dimethyl Ketone; 2-Propanone

Chemical Family:

Ketone

Formula: CH_3COCH_3 **Molecular Weight.:**

58.08

2. COMPOSITION / INFORMATION ON INGREDIENTS

Component	CAS #	Appr %
Acetone	67-64-1	100%

3. HAZARDS IDENTIFICATION**EMERGENCY OVERVIEW**

EXTREMELY FLAMMABLE LIQUID AND VAPOR.

HARMFUL IF INHALED OR SWALLOWED.

CAUSES EYE IRRITATION.

May Cause Damage To Central Nervous System, Liver and Kidneys.

Chronic Exposure During Pregnancy May Be Harmful.

Appearance:

Colorless liquid; pungent odor.

POTENTIAL HEALTH EFFECTS (ACUTE AND CHRONIC)

Symptoms of Exposure:

Harmful if inhaled or swallowed. High concentrations or prolonged exposure causes headache, dizziness, nausea, irritation of eyes and respiratory tract, narcosis and eventually unconsciousness. May cause damage to kidneys, liver and central nervous system. May irritate skin on prolonged contact. Causes eye irritation. Animal studies show adverse effects on fertility when females were exposed chronically during pregnancy.

Medical Cond. Aggravated by Exposure:

Skin conditions, chronic respiratory conditions, pregnancy.

Routes of Entry:

Inhalation, ingestion or skin contact.

Carcinogenicity:

The material is not listed (IARC, NTP, OSHA) as cancer causing agent.

4. FIRST AID MEASURES

Emergency First Aid:

GET MEDICAL ASSISTANCE FOR ALL CASES OF OVEREXPOSURE.

Skin: Wash thoroughly with soap and water.

Eyes: Immediately flush thoroughly with water for at least 15 minutes.

Inhalation: Remove to fresh air; give artificial respiration if breathing has stopped.

Ingestion: If conscious, drink water and induce vomiting immediately as directed by medical personnel. Never give anything by mouth to an unconscious person.

Remove contaminated clothing and wash before reuse.

5. FIRE FIGHTING MEASURES

Flash Point (F): -4F to 0F

Flammable Limits LEL (%): 2.60

Flammable Limits UEL (%): 12.80

Extinguishing Media:

Use water spray, foam, dry chemical, or CO₂.

Water spray to cool fire-exposed containers.

Fire Fighting Procedures:

Wear self-contained breathing apparatus.

Fire & Explosion Hazards:

Dangerous fire and explosive hazard. Vapor can travel distances to ignition source and flash back. Hot organic chemical vapors or mists are susceptible to sudden spontaneous combustion when mixed with air. Ignition may occur at temperatures below published autoignition or ignition temperatures. Ignition temperatures decrease with increasing vapor volume and vapor/air contact time and are influenced by pressure changes. Ignition may occur at typical elevated temperature process conditions, especially in process operating under vacuum if subjected to sudden ingress of air, or outside process equipment operating under elevated pressure if sudden escape of vapors or mists to the atmosphere occurs.

6. ACCIDENTAL RELEASE MEASURES

Spill Response:

Evacuate the area of all unnecessary personnel. Wear suitable protective equipment listed under Exposure / Personal Protection. Eliminate any ignition sources until the area is determined to be free from explosion or fire hazards. Contain the release and eliminate its source, if this can be done without risk. Take up and containerize for proper disposal as described under Disposal. Comply with Federal, State, and local regulations on reporting releases. Refer to Regulatory Information for reportable quantity and other regulatory data.

EM SCIENCE recommends Spill-X absorbent agents for various types of spills. Additional information on the Spill-X products can be provided through the EM SCIENCE Technical Service Department (856) 423-6300. The following EM SCIENCE Spill-X absorbent is recommended for this product:

SX0863 Solvent Spill Treatment Kit

7. HANDLING AND STORAGE

Handling & Storage:

Keep container closed. Store in a cool area away from ignition sources and oxidizers. Do not breathe vapor. Do not get in eyes. Avoid prolonged, or repeated, skin contact. Electrically ground all equipment when handling this product. Retained residue may make empty containers hazardous; use caution!

8. EXPOSURE CONTROLS / PERSONAL PROTECTION

ENGINEERING CONTROLS AND PERSONAL PROTECTIVE EQUIPMENT:**Ventilation, Respiratory Protection, Protective Clothing, Eye Protection:**

Respiratory Protection: If workplace exposure limit(s) of product or any component is exceeded (see TLV/PEL), a NIOSH/MSHA approved air supplied respirator is advised in absence of proper environmental control. OSHA regulations also permit other NIOSH/MSHA respirators (negative pressure type) under specified conditions (see your safety equipment supplier). Engineering and/or administrative controls should be implemented to reduce exposure. Material should be handled or transferred in an approved fume hood or with adequate ventilation. Protective gloves should be worn to prevent skin contact (Butyl Rubber, Viton or equivalent) Safety glasses with side shields should be

worn at all times.

Work/Hygenic Practices:

Wash thoroughly after handling. Do not take internally. Eye wash and safety equipment should be readily available.

EXPOSURE GUIDELINES

OSHA - PEL:

Component	TWA		STEL		CL		Skin
	PPM	MG/M3	PPM	MG/M3	PPM	MG/M3	
Acetone	750	1800	1000	2400			

ACGIH - TLV:

Component	TWA		STEL		CL		Skin
	PPM	MG/M3	PPM	MG/M3	PPM	MG/M3	
Acetone	750	1780	1000	2380			

If there are no exposure limit numbers listed in the Exposure Guidelines chart, this indicates that no OSHA or ACGIH exposure limits have been established.

9. PHYSICAL AND CHEMICAL PROPERTIES

Boiling Point (C 760 mmHg) : 56C

Melting Point (C) : -94C

Specific Gravity (H₂O = 1) : 0.7905

Vapor Pressure (mm Hg) : 184 20C

Percent Volatile by vol (%) : 99.9+%

Vapor Density (Air = 1) : 2.0

Evaporation Rate (BuAc = 1) : 14.48

Solubility in Water (%) : Miscible

Appearance :

Colorless liquid; pungent odor.

10. STABILITY AND REACTIVITY

Stability: Yes

Hazardous Polymerization:

Does not occur.

Hazardous Decomposition:

CO_x**Conditions to Avoid:**

Heat; contact with ignition sources.

Materials To Avoid:

- Water
- Acids
- Bases
- Corrosives
- Oxidizers
- Other: Potassium t-Butoxide; Nitric and Sulfuric Acid Mixture, Bromine, Chlorine

11. TOXICOLOGICAL INFORMATION

Toxicity Data

orl-mus LD50: 3000 mg/kg
orl-rat LD50: 5800 mg/kg
ihl-rat LC50: 50100 mg/cu.m./8H

Toxicological Findings:

Tests on laboratory animals indicate material may cause tumors and produce adverse mutagenic and reproductive effects.
Cited in Registry of Toxic Effects of Chemical Substances (RTECS)

12. DISPOSAL CONSIDERATIONS

EPA Waste Numbers: U002 D001

Treatment:

Specified Technology - Incineration to a level below TCA (Total Constituent Analyses) levels. Contact your local permitted waste disposal company (TSD) for permissible treatment site.
ALWAYS CONTACT A PERMITTED WASTE DISPOSER (TSD) TO ASSURE COMPLIANCE WITH ALL CURRENT LOCAL, STATE AND FEDERAL REGULATIONS.

13. TRANSPORT INFORMATION

DOT Proper Shipping Name:

Acetone

DOT ID Number :

UN1090

14. REGULATORY INFORMATION

TSCA Statement:

The CAS number of this product is listed on the TSCA Inventory.

Component	SARA EHS (302)	SARA EHS TPQ (lbs)	CERCLA RQ (lbs)
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Acetone			5000
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Component	OSHA Floor List	SARA 313	DeMinimis for SARA 313 (%)
-----------	--------------------	-------------	----------------------------------

Acetone	Y		
---------	---	--	--

If there is no information listed on the regulatory information chart, this indicates that the chemical is not covered by the specific regulation listed.

5. OTHER INFORMATION

Comments:

None

NFPA Hazard Ratings:

Health : 1
 Flammability : 3
 Reactivity : 0
 Special Hazards :

Revision History: 1/7/00 1/25/00 5/16/00 8/26/81
 7/1/83 6/1/84 6/1/85 9/12/86 6/5/87 8/28/87 10/27/87
 3/21/89 10/6/89 5/1/90 5/11/90 3/1/91 12/1/92 11/7/94
 8/9/95 11/8/96 6/6/97 8/30/97 8/26/98 1/15/99 5/4/99
 11/30/99

| = Revised Section

N/A = Not Available

N/E = None Established

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Back Safety

Introduction

Museum work often requires lifting, carrying, and reaching in order to move objects from storage to a workroom, from an exhibit room to storage, etc. Safety considerations should always come first. The procedures outlined in this section describe proper handling and techniques to protect your back and limbs from injury, when you are moving and handling objects

Planning Ahead

- Do not do anything in haste.
- Wear comfortable, supportive, non-slip shoes.
- Consider the size and weight of the materials to be moved.
- Test the load before lifting to make sure you can lift it safely.
- If the object is too heavy or bulky
 - Find Help;
 - Use a cart or hand-truck;
 - Make several trips if a heavy load can be split into smaller loads.
- Make certain the path is clear before you proceed.

Proper Body Mechanics for Lifting and Carrying

- For good balance, keep feet apart to maintain a wide base of support.
- Point feet in the direction of the move.
- Keep head and shoulders up, chin tucked in, and back arched when lifting.
- Keep weight close to body, grasp the object you are lifting firmly, and stand up straight. (Do not lift or carry an object in a bent-over posture.)
- Don't jerk when you lift object upward.
- Lift steadily with your legs rather than your back.
- Pivot your feet to turn — do not twist.
- If picking up an object below the waist, bend at hips and knees to a squatting position. Keep load close to your body and lift with your legs to bring the load to waist level.
- If you must slide an object across a floor, push — never pull. Be sure the path is clear and get help if you need it.

Proper Body Mechanics for Reaching

- Obtain a stepstool or stand on a platform to reach objects above the shoulders.
- Decide where you are going to set the load.
- Slide the load toward you and keep it close to your body while moving it.
- Maintain good posture and let your arms and legs do the work instead of your back.
- Kneel, if you must work with or reach objects low to the ground.

Two-person Lifting and Carrying

- One person should direct the move.
- If possible, lift with someone who is close to your own height.
- Both of you should lift the load at the same time using your legs instead of your back.
- Maintain the load at the same height while carrying it.
- Move smoothly as you walk with the load.
- Set the load down together.

COLLECTION DEVELOPMENT

Chapter 3 of the *Handbook* outlines procedures and practices for building and maintaining collections that enrich the interpretive themes at individual park units and are within the capacity of staff to manage properly.

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The Statewide Collection

History and Extent

The statewide collection's origins can be traced back more than one hundred years, even before the founding of the Department of Parks and Recreation, when in 1891, Sutter's Fort Pioneer Museum was given to the people of California. Over the years, the statewide collection has changed in size and scope as archaeological sites, historic sites and structures, and museums have been acquired or developed, and as individuals and institutions have donated objects to the Department.

Approximately 125 park units have museum collections that are housed in over 600 different structures. The collections range from a few natural history specimens at Castle Crags State Park to the thousands of objects found at Hearst San Simeon State Historic Monument. Each park unit collection reflects the unique character of the site. The statewide collection is the aggregate of all the individual park collections and those housed in the State Museum Resource Center in West Sacramento.

Parks acquire and maintain museum objects for many reasons. One reason is to preserve elements of the historic and natural environment original to the park. Another reason is to preserve documentation of people, events, cultural features, or natural features that are central to the park's purpose. A third reason is to support the interpretation of themes that are important at the park. Taken altogether, the collections in the diverse park units cover virtually every topic relating to California's cultural and natural development.

Based on estimates reported by collection managers in 1998, the Department of Parks and Recreation has

- 500,000 – 750,000 three dimensional museum objects.
- 1.6 million archival/library/photographic objects.
- 2 million archaeological objects.

California State Parks Museum Directory

The *California State Parks Museum Directory*, published in 1995, describes the types of objects that are located in DPR units with museum collections. It lists the location of all museums and museum exhibits with summaries of the contents of collections housed in these facilities and the time periods and interpretive topics they represent. Copies may be requested from the Museum Services Section, Cultural Resources Division (916) 653-8767.

Classifications of Museum Collections

Traditionally, the Department's museum collections have been classified on a statewide basis under the nine broad categories listed below. Prior to the advent of computers, these classifications provided a way of organizing records of like items. They remain a useful means of defining the scope and variety of DPR's collection.

Archaeology Specimens. Objects or samples collected as part of an archaeological project. These include objects from DPR properties that for some reason were not accessioned according to DPR's archaeological registration system, and objects collected by others and donated to DPR.

Architectural Specimens. Architectural features separated from a structure (e.g., door, light fixture) that are sufficiently important historically to be retained with museum collections. This category does not include all remnant materials from building restorations.

Art Objects. Paintings, sculptures, drawings, prints, tapestries, and other objects that are created primarily for aesthetic purposes.

Documentary (Archival) Material. Published and unpublished materials, including books, manuscripts, letters, maps, newspapers, and photographs.

Ethnographic Material. Objects relating to indigenous cultures, primarily Native American.

General Artifacts. All objects not specific to other classifications, like furniture, textiles, and tools.

Natural History Specimens. Animal, plant, or mineral specimens.

Vehicles and Machinery. Transportation vehicles (e.g., wagons, locomotives), industrial or agricultural machinery (e.g., pelton waterwheel, hay baler), or large military pieces (e.g., missile), or parts associated with them.

State Park Memorabilia. Objects relating to the history of the State Park System (e.g., documents, oral histories, uniforms, badges.)

Categories of Museum Collections

In addition to the nine traditional classifications, there are several other ways of categorizing museum objects at any one park. These categories are useful for grouping objects by use, management, or significance; however, they are not required or appropriate at all parks. If and when they are used, care should be taken to manage objects in these groupings in ways that are consistent with Department policies.

Museum Objects refers to all objects subject to the Department's museum collection management policies and procedures. This category includes cultural objects, natural history specimens, archival materials, and archaeological and paleontological collections. It also includes objects that may not have been properly processed. It is the nature (that is the age, cost, rarity, historic or artistic significance, etc.) of the object — not its intended use, its caretakers, or its ownership — that determines if it is considered a “museum object” to be accessioned and managed as such.

Core Collection. This term is used to differentiate objects that are considered the most significant to the site, are original to the site, or are the most-closely associated with the purposes of the site from those objects acquired for program purposes. It is also used when referring to objects that form the nucleus of a park collection. “Core Collection” is often used interchangeably with the term “Primary Objects.” Like Primary Objects, objects in the Core Collection should be afforded the highest levels of protection.

Primary Objects/Secondary Objects. Those museum objects that are the most significant to a site, are original to the site, or are the most closely associated with the purposes of the site are sometimes described as “primary objects” in order to indicate that the highest levels of protection should be employed in caring for them. The terms “Primary Objects” and “Core Collection” are often used interchangeably. “Secondary objects” refers to those objects in a museum collection that have lesser significance or have no relationship to the site. Secondary objects are assigned lower priority in certain circumstances, such as the allocation of preservation funds.

Hands-on Collection. Many parks keep a collection of replicas, modern equivalents, common natural history samples, and/or costumes for use in interpretive programs. Hands-on collections should be differentiated from museum collections which have been authorized for hands-on use for a specific period of time and are managed as part of the “hands-on collection.” This does not mean that they cease to be “museum objects,” just that they are temporarily assigned to a program with less demanding management criteria than is usual for museum objects. All museum objects under the Department’s control that are used in hands-on programs must have up-to-date authorizations on file in the form of a *DPR 934: Authorization for Hands-on Use*. These objects include antique items purchased specifically for a hands-on program and items loaned to the park that would be thought of as museum objects if they were owned by DPR. (See Chapter 6, pages 6.67–6.74 for additional information about the hands-on use of museum objects.)

Cooperating Association Collection. Some cooperating associations own museum objects which are relevant to a park’s exhibits or programs. If these are used or stored on-site, a signed *DPR 926: Loan Agreement – Incoming* must be in place. (Program aids that are owned by the cooperating association and used in hands-on programs are considered the same as other kinds of personal property used or stored at the park.) Cooperating associations should not actively collect museum objects in conflict with the park during the period of their contract with DPR. Those that acquire museum objects for donation to the park should do so only in coordination with the designated collection manager and/or superintendent.

Concession Collection. Occasionally, an interpretive concession may have museum objects on display. If the objects are owned by the concessionaire, care should be given that their management is consistent with park ethics and that they are not mingled with DPR objects in a way that causes confusion. If the objects are owned by the Department and managed by the concessionaire, a *DPR 928: Loan Agreement – Outgoing* should be completed. (See Chapter 6, pages 6.35–6.46 for more about outgoing loan agreements.)

Terms To Avoid:

Permanent Collection. All museum objects in the Department’s collections are considered permanent, in that they will be permanently managed according to museum collection policies and procedures and they will not be removed from the collection without proper deaccession procedures. This policy does not mean that every museum object can or should be managed identically, or that all will last indefinitely. Some objects may be appropriate for hands-on use, which will almost certainly accelerate their demise. Objects used for this purpose can be thought of as less permanent than those that aren’t authorized for hands-on use. Since use of the term “Permanent Collection,” can lead to confusion, “Core Collection” or “Primary Collection” are preferred terms.

Personal Objects. In most cases, antiques, collectibles, or documentary materials belonging to park staff or volunteers should not be used or stored at the park for practical as well as ethical reasons. In the rare instance that a Superintendent recognizes an overriding advantage to the public to exhibit objects belonging to someone associated with the park, a *DPR 926: Loan Agreement – Incoming* form must be completed. The objects then are managed in accordance with Departmental policies and procedures as with any other loan by an individual. If a volunteer brings a personally-owned antique to a park to augment his/her living history presentation, care should be taken to handle the object in a manner consistent with park ethics. The object should remain under the supervision of the owner, and should not be mingled with DPR objects in a way that causes confusion. Personal collections should not be identified as a category of objects having a role at the park.

Scope of Collections Statement

Introduction

Every park unit that has or plans to have museum objects is required by Department policy to prepare a written Scope of Collections Statement (SOCS). The SOCS defines specifically which objects, works of art, documents, pictorial materials, and/or natural history specimens the unit collects. The SOCS is the unit's management plan for collecting, preserving, exhibiting, interpreting and making available for public study specific artifacts, specimens, and/or documentary materials. An SOCS normally covers a park unit, but in some instances, it may cover an individual facility, an entire District, or larger regional collection. Scope of Collections Statements should be periodically reviewed and updated.

The information presented in this section has been abstracted from a DPR publication entitled *Guidelines for Writing a Scope of Collections Statement*. The appendix to the *Guidelines*, which contains a list of terms, a bibliography, and several sample SOCS's, has been omitted. If this material would be helpful to you, you need to look at the *Guidelines* themselves. Copies may be obtained by contacting Museum Services Section.

Purpose

When the offer of a gift or potential purchase is received at your unit, a thoughtful comparison with the SOCS paves the way for either acceptance or rejection of the object(s). It provides the basis for budgeting and overall planned management of the unit's collections. A completed SOCS is a prerequisite to recommending objects for deaccession. The Scope of Collections Statement is an invaluable aid for the curator or collection manager in explaining the park's collection policy to the public, volunteers, immediate management, staff, and headquarters personnel.

Who Writes the SOCS?

The Scope of Collections Statement is best written by the unit or district Curator. In the absence of a Curator, the SOCS should be written by the Collection Manager or that person who has the most knowledge of the collection.

Who Reviews and Approves the SOCS?

The SOCS is reviewed and approved by the Deputy Director for Park Operations or his/her designee – usually the District Superintendent – and a copy is filed with DPR Statewide Museum Collections Records.

What Does a SOCS Include?

The Scope of Collections Statement may be relatively brief in the case of parks where museum objects play a small role, or more fully developed in the case of parks with more complex collections. The SOCS should be sufficient to guide both accessions and deaccessions. A basic Statement includes the following:

1. A description of the kind of objects appropriate and desirable for the collection of the Park. This description should address the Department's Mission Statement, the Park's Declaration of Purpose, interpretive themes, and intended uses for the collection.
2. A description of the relationship of the Park's museum collection with those of other State Parks or non-DPR museums. This description should clarify areas of shared and/or limited interest; examples include Bidwell Mansion SHP which collects papers relating to the mansion but not necessarily *every* autographed letter ever written by or addressed to John Bidwell.
3. A summary of the current content of the collection. The summary may include a description of the kind of objects held, their use, significance, condition, locations, and areas of representation. A history stating how or why objects were acquired may also be appropriate.
4. A recommendation for collection development. This recommendation should identify areas (if any) that should be strengthened through acquisitions. It should also address those portions of the collection (if any) that are irrelevant to the Park's purpose, or are surplus to the Park's needs.

What Will I Need?

You will find the following steps helpful in your preparation to complete a Scope of Collections Statement:

1. Assemble and review those documents from the following list that are available for your unit:

- DPR's Mission Statement
- Declaration of Purpose
- General Plan
- Master Plan
- Interpretive Prospectus
- Interpretive Plans
- Exhibit Plans
- Furnishing Plans
- Resource Management Plans
- Management Plans
- Other relevant planning documents

2. Consult the unit's history files at the Park, District, or Service Center.
3. Assemble relevant Scope of Collections Statements prepared by other similar Park units.
4. Discuss or consult with other unit staff and DPR collections managers.
5. Physically inspect and refresh yourself with all of the collections whether on display or stored – both on-site and off-site.
6. Review the unit's acquisition records and any other relevant documents.
7. How do I assess my park's collection?

You may have to make some decisions as to what is an artifact or museum object, and determine what is State-owned, loaned, or on deposit at your unit. Living history costumes, props, replicas, and expendable hand-held objects that are State-owned may or may not be considered part of your unit's collection. Objects do not have to be fully cataloged to be considered for inclusion in the SOCS; the completed SOCS will undoubtedly be helpful in reevaluating or prioritizing artifacts for cataloging in the future.

Answers to the following questions will help you in drafting the SOCS:

1. What objects does your park unit have; what has your unit collected to date and why? Types of object could include:

- Furnishings
- Architectural features
- Textiles
- Ethnographic materials
- Vehicles
- Natural history specimens
- Photographs
- Documents
- Archaeological collections
- Firearms
- Tools
- Fixed and portable objects

2. Does your unit have specific types or categories of collections (i.e., primary, operable, hand-held, loaned, study or reference, consumable, parts, etc.?)
3. Do any of your unit's collections have priorities? Are some artifacts, specimens or documentary materials more important, more valued, or more significant than other parts of your unit's collections?
4. Are there important issues of provenance, donations or purchases that have been instrumental in shaping your unit's collection?
5. Are there important political considerations or ramifications associated with the collection?
6. Are there objects that reside at the unit as a designated or de facto repository?
7. Does your unit's collections include archival, archaeological, or architectural features?
8. What shouldn't you collect and why?
9. Does your unit have objects on loan or deposit with another park, museum or other institution?

10. Are there significant dates, cultural or geographical bounds, interpretive themes, people, places, and/or events that shape or help determine your unit's collections?
11. What should your unit be collecting?

Documentation

Copies of the completed and approved Scope of Collections Statement should be maintained with the unit's collection records, at the District, and at Statewide Museum Collection Records. Copies of supporting materials used to assemble the SOCS should be maintained with the unit's collections.

General Plan

A Scope of Collections Statement is often prepared as part of the unit's General Plan process. A summary of the collections management plan is included as part of the General Plan. In most instances, however, the SOCS will be a separate, stand-alone collection management plan.

Sample Outline

Following is a sample outline which may serve as a helpful guide or checklist of what to include in your unit's Scope of Collections Statement:

Suggested Outline for a Scope of Collections Statement

Title Page

Unit/Park Name

SOCS – title

Prepared by: Name, Position, Date – month/year

Signature and Approval Dates – month/day/year

Deputy Director for Park Operations – usually the District Superintendent

Sector Superintendent/Museum Director – optional

A. Introduction

1. Brief description of the unit
2. Brief description of the collection
3. Planning documents and persons consulted

B. Declaration of Purpose of the unit

C. Major interpretive themes, topics and/or periods of the collection

D. History of the collection

1. Date collection was acquired
2. Major donors or collectors

E. Collection content summary

1. Types of objects
2. Significance
3. General condition
4. Physical locations

F. Uses of the collection – exhibit, hand-held, study, etc.

G. Relationship of the collection with other State Parks and other non-DPR institutions

1. Shared interests
2. Loans

H. Collection development goals – recommended acquisitions and deaccessions

I. Collection management goals - optional

1. Cataloging
2. Conservation
3. Security
4. Environmental conditions
5. Storage

SOCS Guidelines and Sample Statements

Copies of the *Guidelines for Writing a Scope of Collections Statement* (2000) that includes several sample statements for various DPR parks have been distributed widely within the Department. If you are unable to locate a copy at your unit, contact Museum Services Section for additional copies.

Acquisition of Objects — Criteria

Introduction

Objects are acquired for State Parks through gifts, bequests, purchases, property surveys, finds on site, and any other means by which title is transferred to California State Parks. Those involved in the acquisition of an object must carefully weigh its value as it relates to the unit's statement of purpose and the ability to care for it. Marie Malaro said in her book *A Legal Primer on Managing Museum Collections*, "In reality, not even a gift is free. Each acquisition places demands on the museum's resources." The following criteria are offered as guidance when you are considering a specific acquisition for your park unit:

Criteria for Acquiring Museum Objects

1. Is the acquisition compatible with the Department's Mission Statement and the unit's Scope of Collections Statement?
2. What is the object's historic, aesthetic, or scientific significance, and/or rarity?
3. What is the object's intrinsic and/or market value?
4. How would this object enhance knowledge, interpretation, and/or research in the related subject area at your park?
5. What is the physical condition of the object and what conservation may be required?
6. What are the unit's capabilities for long-term curatorial care of the object (i.e., exhibit or storage space, staff time, maintenance, etc.)?

Criteria for Declining Potential Museum Objects

In keeping with Department policy, museum objects should not be accepted under these circumstances:

1. The object is incompatible with the Department's Mission Statement or the unit's Scope of Collections Statement.
2. The park unit is unable to care for the object or keep it secure according to prevailing professional standards.
3. Possession of the object would violate state, federal, or international law, International Council of Museum's ethical guidelines regarding illicit material, or an environmental ethic to which the Department subscribes.
4. There is reason to believe the donor or seller does not have clear title to the object.
5. The object presents a health risk or hazard to staff or the public.
6. The objects are Native American human remains, associated funerary objects, or cultural objects subject to repatriation under Public Law 101-601. Such objects may not be accepted without written permission from the tribe(s) culturally-affiliated with them.
7. The specimens or artifacts are paleontological or archaeological objects that have been collected for commercial purposes. DPR staff may not purchase or cause such items to be purchased.
8. The object would duplicate artifacts or specimens already in the collection.

When in Doubt

Occasions may arise when there is uncertainty even after applying the criteria for accepting or declining objects. It is often difficult to turn down something that is free, and it may be tempting to rationalize its appropriateness. One way to handle such a situation is to ask yourself if, in fact, you would be willing to purchase these objects if money were available.

Gifts

Introduction

The Department's museum collections have been enriched immeasurably by citizens, businesses, and other entities that have generously donated artifacts and natural history specimens. This section describes the step-by-step procedures for acquiring museum objects through gift by individuals and organizations. The chronology may vary depending on the situation, but the steps are essentially the same for all methods of acquiring objects.

Initial Offer

A gift offer may consist of one or more objects. The potential donor may make the offer in a variety of ways -- by phone, letter, e-mail, or during a visit to the park. You may be able to determine from the initial contact whether an object is appropriate for your unit. If it is not, you can graciously decline the offer at this time. If you feel the object would have value for another unit's collections, you may want to advise the potential donor how he/she can contact that unit.

Evaluation

Gathering Information. It is important to obtain as much information as possible about museum objects at the time an object is being evaluated for acceptance. This information will be helpful in determining the significance and the proper interpretation of the object. It may be valuable in justifying acceptance of the gift.

Arrangements will need to be made to examine the object visually whether the object is brought to the unit or whether you meet the donor at some other agreed-upon place.

Gather as much information as possible. This process should not be postponed to a future time, as it seldom happens later. Later, if the item is accepted, place all information in the object's folder. (See "Object Folders," Chapter 5, Registration, pages 5.39-5.40.)

Formulating Questions. The following are possible questions you may wish to ask to obtain information from a donor or other source about a specific gift:

1. How did the object(s) come into the donor's possession? Was it/were they...
 - a. In the family?
 - 1) What was the family name?
 - 2) What was the family relationship to the donor?
 - 3) Where did the family live?
 - 4) What did they do?
 - b. Purchased?
 - 1) From whom?
 - 2) When? Where?
 - 3) How much was paid?
 - 4) Why was it purchased? (A gift/everyday use/ a collection.)
 - c. Given to them?
 - 1) When? Where?
 - 2) By whom?
 - 3) What was the donor's relationship to this person?
 - 4) Why?
 - d. Found?
 - 1) When? Where?
 - 2) Any unusual circumstances surrounding the find?
2. Use of the object(s):
 - a. How was the object used? (Describe the action: Uncle Joe held it in his left hand and pumped it with his foot.)
 - b. Who used or wore the object?
 - c. When was it used? (Every day/holidays/in the winter/during WWII/ when I went skiing.)
 - d. Where was it used? (On the kitchen stove/in the barn in New England and later in California.)
 - e. What did its use signify?

- f. Why has this object(s) survived or been saved?
 - g. Has it been altered? If so, why?
 - h. How does/did it work?
3. Manufacture of the object(s):
- a. Who made it? (William Keith/Singer company/Billy the Tinsmith.)
 - b. Who altered it or repaired it?
 - c. When was it made?
 - d. Where was it made?
 - e. When/where was it altered/repaired? (in 1955 at the local sheet metal shop.)
 - f. Why was it made? (To honor a special occasion/need/tradition/technological breakthrough.)
 - g. How does/did it work?
4. Are there photographs of the object(s):
- a. Showing use or location?
 - b. Related photos of people or places?
5. Are there any interesting stories connected with the object(s)?
6. Are the object(s) associated with any person, site, event, or industry in California history, United States history, or world history?

Preparing the Inventory. If your evaluation indicates that this gift offer is acceptable, the next task is to complete an inventory of objects. Since there isn't an official form for this activity, you will need to list the items offered in the gift with enough descriptive detail to identify individual pieces. You should also note the condition of the object on the inventory. If it is subsequently decided to accept the gift, this inventory can be used as the object list on the gift document. The following is an example of how such an itemization might appear:

Gift of Personal Property from James Davis
Inventory of Objects
November 25, 1997

4 items total

One (1) hammer: shoemaker type. Head is 3 ½" long. Wooden handle is 10 1/8" long. Marking on head "Sears Roebuck Drop Forged." Face of hammerhead is 1 7/8." Excellent condition.

One (1) razor case. Brand name "Old Faithful." Trademark "An A1." Manufactured by A. J. Jordan, Sheffield, England. (2 pieces). The metal case is dented in several places.

One (1) pair eyeglasses. Lens is 1 5/8" x 1 ¾," bifocal. Frame is 12K gold-filled with flexible ear pieces and ivory nose pads (one missing).

One (1) box 12 ½" x 16" x 10 ½" containing business records (e.g., correspondence, account books, advertisements, etc.,) from Goodnight's General Store, Tuleville, CA (1856-1882).

Photographing Potential Gifts. If possible, photograph the objects in the proposed gift. Pictures can aid you in illustrating the nature and quality of objects offered in a gift for those who are required to approve the acquisition. You may also want to ask the donor if he/she has photographs of the objects, and if it is possible to obtain copies of them. Such images may add to your knowledge of the objects' history and provide a frame of reference for evaluating their condition.

Handling Donations Suitable to Other Sites. A donor may offer artifacts or specimens that are not appropriate for your unit but may have statewide significance or usefulness at another site. In this situation, explain to the donor why the gift would not be appropriate for your unit and ask if he/she would be interested in contributing the item to another park. If the donor agrees, contact staff at other districts and/or at the State Museum Resource Center to inquire about the suitability of donating these objects to them. For assistance in identifying an appropriate unit for the gift, you may want to refer to the DPR Museum Directory, or contact Museum Services Section.

Acquisition Pitfalls

A pattern of common pitfalls has emerged in the Department of Parks and Recreation in connection with the acquisition process. Be watchful of these dangers:

Bypassing Paperwork to Save Time. A donor wants to give the park several tinsmithing tools. No strings, no conditions. The park can use them. Why bother with paperwork?

There are many reasons. The donor may come back in a few months to see his tools, and would be upset if you couldn't identify which ones were his. A third party could claim the tools belonged to them. The tools could easily get mixed up with others that are historically significant. If you decide later to repair or deaccession them, it could take days to determine their status. Eventually, your staff or volunteers will not feel it necessary to adhere to a system that you are not following yourself.

Bypassing Paperwork to Avoid Constraints. One of your volunteers offers to give fifty-year-old carpenter's tools to your park for use in living history programs. You decide not document them, because, if you do, you won't be allowed to use them freely for demonstrations. The issue here is not accessioning, but determining appropriate use of donated objects, an issue that is best resolved before you accept the gift. Improper use of artifacts in State Parks is not permissible, whether the artifacts are part of the museum collection or not. Provided that the tools are suitable for hands-on use, proper accessioning of the tools is the best guarantee that you can use them now and in the future. The Museum Curator reviewing the *DPR 934 Authorization for Extended Hands-On Use* may be reluctant to recommend extended use without records showing the origin and nature of the tools. If the tools have no value as museum objects, it is still a good idea to track them as "Z" objects (see Chapter 5: Registration, pages 5.15–5.16), so they are not mistaken later for something more valuable.

Accepting Things Because They're Free. A common temptation at historic sites is to collect "old stuff" because it's free. A visitor, for instance, offers to donate agricultural equipment to the site because, the park's barn "looks empty." Accept the objects only if they are appropriate to your site and will contribute to its interpretation. Although the objects are "free," the staff time to document, curate, and store them can be costly.

Saying No. It is sometimes hard to "say no," for fear the donor will feel insulted or disappointed if their offer is declined. Most donors will understand if you explain the reasons why the Park is unable to accept their offer. If possible refer the donor to other State Parks and outside nonprofit institutions that might have a need for the objects.

Acceptance

Keeping the Donor Informed. Remember that it is important to keep the prospective donor informed as the acquisition progresses. He/she should be apprised of the required forms, approvals, timelines, and names of staff members involved in the process. Depending on the time of year and value of the gift, there may be tax ramifications for him/her.

Approvals. To complete the transaction, signatures and/or approvals may be required from some or all of the following persons or entities:

- Owner
- Agent
- Designated Museum Collection Manager
- District or Park Superintendent (at Headquarters, the Division Chief or Section Manager)
- Deputy Director for Park Operations
- Department of Finance
- Staff releasing, delivering, or receiving the gift.

Insurance. The Department's museum collection is self-insured. The term self-insurance means that in cases of loss, you can purchase replacement objects only if the money is available in your unit's budget. The Department does not have a fund designated to cover the loss of artifacts, regardless of the cause. The reality is that it just may not be possible to replace a lost or damaged object, even if a suitable replacement can be found.

For special circumstances in which you feel additional insurance is warranted, contact the Office of Risk Management under the Department of General Services to determine if other insurance options are available.

Documentation

DPR 925, Deed of Gift is the instrument that conveys legal title from a donor to the Department of Parks and Recreation. If it is not completed correctly, the Department's ownership could be jeopardized. While the Deed of Gift records the transfer of ownership of specific objects, it does not document their physical transfer, which may happen before or after the transfer of ownership has taken place. The physical transfer of the objects into DPR's possession is documented with a *DPR 927, Receipt of Objects-Incoming*.

Sources of DPR Collections Management Forms. There are three ways you can obtain museum collections forms. You can order them from the Department warehouse in Sacramento. You can request them on disk from Museum Services Section and download them on your computer. The forms are also in the share folder of the Department's WAN (Wide Area Network) which is available in all DPR District Offices. The use of a WAN form assures that you are using the latest revision. Computerized versions of the forms are in Excel.

Legibility. All forms should be printed from a computer printer, typed, or filled out in ink. Signatures and handwritten notations are best created in blue ink so that originals can be differentiated from photocopies. (Black ink, however, is legal.)

Printed Names. Wherever the form calls for a signature, there will be a space for a printed name. Signatures are hard to read. It is important to include a printed name for those who need to obtain information from this document in the future.

Number of Copies. Complete the *DPR 925* in quadruplicate. All copies should have original signatures on them.

Appraisals and Valuation. Do not place a monetary value on the gift document, or even offer a monetary value verbally. While all gifts to the Department of Parks and Recreation are tax deductible and donors may need to establish value for tax purposes, they must obtain such appraisals from outside sources. It is against State policy for employees to provide appraisals of personal property for others. You may note the valuation, if it is known, in the accession file or on the catalog card.

Companion Forms. Complete a *DPR 927, Receipt of Objects-Incoming* at the time DPR takes physical custody of the object(s) whether they are being permanently transferred to the Department or whether they are left temporarily at a unit for review. Present a copy to the donor or his or her agent. See Chapter 6, pages 6.25-6.33 for information on completing a *DPR 927*.

Complete a *DPR 929, Release of Objects-Outgoing* to document the return of objects to the owner/agent, if the gift offer is declined. Instructions for filling out a *DPR 929* and a sample can be found in Chapter 6, pages 6.47-6.56.

The Collection Manager may choose to complete a *DPR 932, Collection Manager's Transmittal*. This form is used to convey relevant information about a gift or other activity that requires the Superintendent's signed authorization. It allows the Collection Manager to explain the reasoning behind his or her recommendations and alert the Superintendent to the implications of approval or disapproval.

For donations of high value (\$500 or more), a donor may ask you to sign an *Internal Revenue Service 8283 Non-cash Charitable Contributions* form. It is permissible for a DPR employee to complete and sign section IV provided that the donor and an appraiser have completed the other parts of the form. Your signature confirms that

- The object was physically received on a specified date;
- You will notify the IRS and the donor if the object is sold, exchanged, or otherwise disposed of within two years of its donation;
- The museum will or will not use the object to support its mission.

Contact Museum Services Section if you have questions.

Legal Title. The statement at the top of the Deed of Gift DPR 925 reflects DPR's policy that title to all acquired museum objects should be obtained free and clear without restrictions as to use or future disposition. You should advise the donor of this policy when he/she signs the gift document. For the vast majority of objects — furniture, tack, carpenter's tools, chinaware — restrictions on their use will never be a concern. For created works — photographs, journals, paintings, letters, etc. — copyright may be an issue. If you have any doubt about obtaining full rights to such items, you should consult with a person on your staff who has had intellectual property rights training, or call Museum Services Section in Sacramento.

Accession Numbers. All acquisitions, namely gifts, purchases, transfers from other state agencies, and objects found on site are assigned an accession number. All objects acquired from one source at one time are part of the same accession. The accession number identifies the particulars of a specific accession. A subsequent acquisition from the same source is given a new accession number. Multiple gifts from one donor are related through the park's Source file. (See Chapter 5: Registration, pages 5.40–5.43 for further information regarding source files.)

The accession number has two parts: 1) the registration location number (a number assigned to a registration system by Museum Services Section to serve as a prefix for all numbers in that system), and 2) the next consecutive number in the sequence. For example, consecutive accessions for a park with the registration location number of "794" might be as follows:

794-9
794-10
794-11

Accession records are filed consecutively with other accession records.

Prior to December 1996, most accessions from the same source were given the same accession number, and all purchases, transfers, and objects found on site shared the same accession number of "1." Modifications to the numbering system were made to facilitate park record keeping and statewide automation.

Completion of a *DPR 925, Deed of Gift Step-by-Step*. Two sample forms follow (see Figures 9 and 10). Numbers have been placed on the forms to correspond with the numbered instructions. Prepare one original and three copies all with original signatures.

DPR 925, DEEDS OF GIFT

(FIGURES 9 & 10)

Instructions for Figures 9 & 10 – DPR 925, *Deeds of Gift*

1. List at a minimum the name of the object and one identifying feature, such as its dimensions, materials, or manufacturer.
2. If there is time and opportunity, you may choose to record an expanded description that includes all or part of the following information: the name of the object, the date of the object, dimensions, materials, color, artist or maker, condition, and provenance. (For instance, you may want to note if a previous owner was a significant historic figure.)
3. If the information exceeds the space available on the front of the DPR 925, list the objects on separate pages. Check the appropriate box to indicate whether the object(s) is/are described below or are described on attached pages.
4. Enter the number of attached pages on the line below the accession number. Write "0" if there are none.
5. The owner holds legal title to the object(s) and authority to transfer title or direct their use. In the appropriate spaces include the donor's printed or typed name, address, city, state, zip code, phone number, and the date. The donor(s) should sign four copies of the DPR 925.
6. If the object(s) are owned by more than one person, have the joint owner sign all four copies, too. A joint owner is often a spouse. In states with joint property law, the signature of both spouses may be required on the Deed of Gift. In the appropriate places include their printed or typed name, address, city, state, zip code, phone number, and date. (If there is only one owner, this line will remain blank.)
7. If the owner has designated an agent to handle the gift, the agent signs on this line. An agent does not hold legal title to the object, but has authority to act on behalf of the legal owner. Some examples of agents are a person with power of attorney for another, the executor of an estate of a deceased person, and an officer of an organization or institution. (If the owner or owners signs this document, these lines will be blank.)
8. In the section marked "Acceptance by California Department of Parks and Recreation" the Museum Collection Manager signs, prints or types his/her name, and dates the form. The Collection Manager's signature assures the Superintendent that the objects and circumstances have been reviewed by someone knowledgeable in museum collection management and who is familiar with the unit's collection.
9. Have the [District or Park] Superintendent check in the designated boxes, whether he/she accepts, does not accept, or accepts the object subject to Department of Finance approval. On the next line, he/she signs, types or prints name, and dates the form.

Legal title to an object is not transferred to the Department until the gift document is signed by the District Superintendent or the Park Superintendent if authority has been specifically delegated to him or her. At headquarters, the Division Chief serves in this capacity, unless authority has been specifically delegated to the Section Manager. Obtain the Deputy Director for Park Operation's signature if the activity exceeds the Superintendent's delegation, the transaction deviates from Department policy, or the gift requires Department of Finance delegation to DPR. If the approval of the Deputy Director for Park Operations is not required, check the box marked "Not applicable."

10. Obtain the Deputy Director for Park Operation's signature if the activity exceeds the Superintendent's delegation, the transaction deviates from Department policy, or the gift requires Department of Finance delegation to DPR. If the approval of the Deputy Director for Park Operations is not required, check the box marked "Not applicable."
11. Obtain approval from the Department of Finance, if necessary. Such approval is normally only required for gifts over a specified value. In past years, the limit has been \$15,000. Since this figure is subject to change, you can contact DPR's Budgets Office to find out the latest delegation amount. If approval from the Department of Finance is not required check the box marked "Not applicable."
12. Assign the two-part accession number to the gift and enter it in the upper right hand corner. (See Accession Numbers, this section, pages 3.24-3.25.)
13. Indicate who receives the copy.



12. 794 - 30
Accession Number
4. Number of Attachments 0

Deed of Gift

I (we) hereby irrevocably and unconditionally give, convey, and assign to the California Department of Parks and Recreation all rights, title and interest (including copyrights and associated rights) which I (we) have in and to the objects described 3 below on additional pages. I (we) affirm that the objects of this gift were acquired legally and without any encumbrances or restrictions, and that I (we) have authority to make this gift.

- Gown, from Paris, purple and gold with sash
- Gown, from Paris, green and cream color
- Dress suit, wool, tails, black
- Nightgown, white, long, cotton
- Hat, straw, rust color ribbons
- 1. Muff, white fur
- Neck pieces, fur (3)
- Cuffs, fur, (3)
- Slippers, black, trimmed with fur
- Purse, black velvet
- Shirts, white cotton (4)
- Shirt collars, white cotton (7)
- Bow tie, white silk
- Hat, black, silk, collapsible top
- Gloves, brown leather calf skin
- Buckle, sterling silver, small

5. Owner's Signature Simone Buchard Owner's Name Simone Buchard Date 8/7/1999
Address 6985 Route 2, Box 703K City-State-Zip Klarnath Falls, Ore 83209 Phone 541/488-4856
Owner's Signature (Joint ownership may require additional signatures)

6. Address _____ City-State-Zip _____ Phone _____

7. Agent's Signature _____ Agent's Name and Title _____ Date _____
Address _____ City-State-Zip _____ Phone _____

Acceptance by California Department of Parks and Recreation

8. Collection Manager's Signature Christina Kudrina Collection Manager's Name Christina Kudrina Date 8/16/1999
Determination by Superintendent

9. Accept Do Not Accept Accept subject to Department of Finance approval
Superintendent's Signature Clayton R. Strong Superintendent's Name Clayton R. Strong Date 8/16/1999
Deputy Director of Park Stewardship's Signature Not applicable Deputy Director of Park Stewardship's Name _____ Date _____

10. Department of Finance Signature Not applicable Department of Finance Name _____ Date _____

11. _____
13. Distribution: Park Files Statewide Records Donor

DPR 925 (Rev. 4/99) (Excl 4/20/1999)

Figure 9 — Sample Deed of Gift



12. 794 - 9
Accession Number
4. Number of Attachments 1

Deed of Gift

I (we) hereby irrevocably and unconditionally give, convey, and assign to the California Department of Parks and Recreation all rights, title and interest (including copyrights and associated rights) which I (we) have in and to the objects described below 3, on additional pages. I (we) affirm that the objects of this gift were acquired legally and without any encumbrances or restrictions, and that I (we) have authority to make this gift.

2. See attachment for list of objects.

5.	Owner's Signature <i>Jane M. Bay</i>	Owner's Name Jane M. Bay	Date 1/5/1999
	Address 1234 Bradley Street	City-State-Zip Los Angeles, CA 92313	Phone 818/380-1671
6.	Owner's Signature (Joint ownership may require additional signatures) <i>John S. Bay</i>	Owner's Name John S. Bay	Date 1/5/1999
	Address 1234 Bradley Street	City-State-Zip Los Angeles, CA 92313	Phone 818/380-1671
7.	Agent's Signature	Agent's Name and Title	Date
	Address	City-State-Zip	Phone

▼ Acceptance by California Department of Parks and Recreation

8.	Collection Manager's Signature <i>Christina Kudrina</i>	Collection Manager's Name Christina Kudrina	Date 1/10/1999
	Determination by Superintendent		
9.	<input checked="" type="checkbox"/> Accept <input type="checkbox"/> Do Not Accept <input type="checkbox"/> Accept subject to Department of Finance approval		
	Superintendent's Signature <i>Clayton R. Strong</i>	Superintendent's Name Clayton R. Strong	Date 1/10/1999
10.	Deputy Director of Park Stewardship's Signature <input type="checkbox"/> Not applicable	Deputy Director of Park Stewardship's Name	Date
	Department of Finance Signature <input type="checkbox"/> Not applicable	Department of Finance Name	Date

11. DPR 925 (Rev. 4/99) (Excl 4/20/1999) 13 Distribution: Park Files Statewide Records Donor

Figure 10 — Sample Deed of Gift

Gift of John and Jane Bay
Accn. No. 794-9

Page 2 of 2

One silver condiment tray. Oval shaped, 5"x 3.5." Grapevine design around edge. Engraved on the back "LaRue 1885."

One creamer with matching lid, both painted sky blue. Lid decorated with pink roses and green leaves. Lid and handles rimmed in gold. 4.2" tall: base 3.4" in diameter. Small chip on lip of creamer. Manufacturer: Tariscon, France.

One sugar bowl with matching lid, painted sky blue. Lid decorated with pink roses and green leaves. Lid and the bowl's 2 handles are trimmed in gold. 4.2" tall: base 3.8." Manufacturer: Tariscon, France. Excellent condition.

One handmade tablecloth 6'x4.' Linen cloth is cream-colored with lace inserts and lace edging. There are several holes in the lace along edge.

Six napkins that match tablecloth, all with lace edging. Napkins are 10"x 10."

Four crystal knife rests 3.5" long. Round knobs at each end are .75" in diameter. Excellent condition.

One set – crystal saltcellar with silver spoon. Dish is square 1.5"x1.5" base. Spoon is 2.3" long. Excellent condition.

One four-page letter written in French from Madame Bowdler to Cherie (Cherry) LaRue, dated July 17, 1856. Paper is quite brittle. (Madame Bowdler, Cherry's mother wrote this letter to Cherry soon after she married Jacques.)

Jane Bay is Cherry LaRue's great, great, great, granddaughter. All of the above items have been passed down through family members to her. When Fabled Ranch was acquired by California State Parks, Jane donated these objects to the park to enrich the public's understanding of her renowned relative.

Distribution

1. Give one copy of the *DPR 925* to the donor(s) or agent. This step creates a preliminary statement of the content of the gift while the gift offer is under review by park staff.
2. When the gift has been approved and all signatures obtained, file a copy of the *Deed of Gift* along with any supporting information, related correspondence or provenance information in a folder labeled with the accession number.
3. Send one copy to the donor with a letter of appreciation from the District or Unit Superintendent.
4. Send one copy to Statewide Museum Collections Records, Museum Services Section, Cultural Resources Division, Sacramento. This step assures that if your unit copy is lost another copy exists off-site.

Physical Custody

Precautions should be taken when transporting the objects. Be sure to check the size of your vehicle, including door openings, to be sure the objects will fit. Also, consider the weather and how you will protect the objects from abrupt changes in temperature and humidity. Consider how you will secure the vehicle if you stop on the return trip for a meal. Decide what you will do in the case of a vehicle breakdown. Assemble packing materials, tie down cords, and any tools that you anticipate will be needed to safely move the object(s). Bring with you the appropriate forms — *DPR 925*, *Deed of Gift* and *DPR 927, Receipt of Objects – Incoming*.

It is important at this stage to be precise as to what is being turned over from the donor to the DPR staff person and to accurately record this exchange. It is also important for the donor to feel assured that these objects, to which the donor might still have some strong emotional ties, will be handled in a sensitive and professional manner. Some actions that can be taken to avoid future misunderstandings and to reassure the donor that the objects will be given due respect, include the following:

- Verify that the donated objects match the inventories on the *Deed of Gift*, *DPR 925* and *Receipt of Objects – Incoming DPR 927* forms. If convenient have the donor assist with this task so that there will be no doubt later as to what was actually received.

- Photograph objects showing any unique features or problems (i.e., broken parts, insect or environmental damage, significant associations between objects and original location, etc.).
- Tag objects or pack them in boxes clearly labeled with both the accession number and date. Be professional in your object handling and packing techniques using new boxes, acid-free packing materials when called for, and gloves, as appropriate.

To avoid theft, loss, or even the possible appearance of impropriety, deliver the objects to the storage facility directly. Also, for the physical well-being of the objects, it is good to limit their time spent in a vehicle. Movement and vibrations during transport, as well as the dramatic climatic fluctuations that can occur, call for this exposure to be as brief as possible.

Donor Protocol

It is standard practice to send a thank-you note with the donor's copy of the *Deed of Gift*. There are many ways of acknowledging a gift of artifacts or natural history specimens. In addition to a letter of appreciation, these are other means of recognition:

- Publicity (donor lists published in a park newsletter, for example)
- Events
- Awards
- Gifts of commemorative or memento items
- Donor books
- Interpretive displays

Normally, donors of artifacts should not be recognized with exhibit labels, in order to avoid visual clutter and obtrusive signs. However, donations may be of such an exceptional value, scale or nature that they merit special recognition.

If it is decided to display a contributor's name on an exhibit label or plaque, the sign should be designed and situated in a manner that does not detract from the appearance of the donated item, or the area where it is exhibited, or compromise the Department's image. (For more information, refer to the booklet *Donor & Sponsorship Recognition Guidelines* published by California State Parks: 1997.)

Curation

Once the objects are in your physical custody and placed in a secure holding area, they should be immediately recorded in the unit's accession book and/or TMS, the Department's electronic collections management system. A full discussion of the procedures for registering objects is found in this manual in Chapter 5: Registration.

If the objects will not be exhibited immediately, and you lack time to catalog them prior to placing them in storage, at a minimum assign a unique catalog number to each object in the accession and make sure each is clearly tagged with the catalog number. The catalog numbers and storage locations should then be noted on the unit's copy of the *Deed of Gift DPR 925* and on the donor card or entered in the electronic records management system. Relying on memory rather than records to keep track of this type of information almost guarantees that some or all of the information will be lost.

Bequests

General Procedures

A bequest is the transfer of property under the terms of a will. Remember, though, that your Park unit is not obligated to accept an object because it is part of a bequest. The object should meet the requirements of the Park's scope of collections statement and, like any other potential acquisition, be evaluated for acceptance or rejection.

The way you handle the bequest depends in part on whether or not you are notified in advance:

Advance Notice. A prospective donor may advise you of his/her wish to will certain items to your Park, at which time you can inform him/her that bequests are not automatically accepted and explain the Department's acquisition policies and procedures. Knowing about a bequest beforehand also presents an opportunity to document the history of the objects.

Without Advance Notice. In this case, the Park Unit will usually be notified of the bequest by the executor of the estate or the law firm representing the executor. You should ask for a copy of the will or portion of the will that concerns the bequest. With this information, the staff involved can decide whether to accept all, some, or none of the items listed in the will. You should then communicate that decision to the estate's legal representative. The transfer will not be final until the court has officially closed the estate.

Objects Donated from Heirs

If the heirs of an estate donate objects to your park, it is a gift to the unit, not a bequest. In other words, title to the objects has passed first to the heirs under the terms of a will, and they, in turn, make the gift to the museum.

Documentation

To document a bequest, complete and file a *DPR 925, Deed of Gift* and attach the will or relevant portion of the will to it. Be sure the form has been signed by the executor of the estate. (For further information regarding the completion of a *Deed of Gift DPR 925*, see this chapter pages 3.22–3.32.)

Purchases with State Funds

Introduction

Objects acquired with funds belonging to the Department of Parks and Recreation are considered purchases. Such purchases may include period objects, replicas, or interpretive props. If the money to purchase an object comes from any other source, the object is considered a gift from that source. For instance, cooperating associations frequently purchase objects for the parks they support. These are considered gifts from the association to the park and should be documented on a *DPR 925 Deed of Gift*.

Before you buy, you may want to check with other State Parks or the State Museum Resource Center in West Sacramento to see if another unit has the type of object you need in surplus. It may be possible to secure the item through a park to park transfer.

Procedures for Buying Objects

1. Follow the basic steps for a purchase that you would for any acquisition. Verify that the object meets the requirements of the unit's scope of collections statement. Obtain as much information as possible about the provenance of the object. Remember that a reproduction may have its own story of historic interest for future generations. Photograph the object and evaluate its condition.
2. Check to see if the vendor is in the CALSTARS Database. Often small antique shops or individual dealers will not be in the Database. If this is the case, consult with the person in your unit responsible for purchases to determine what will need to be done to have the vendor listed.
3. For all purchases over \$5,000, you must obtain bids from a minimum of two vendors and complete a *DPR 970 Purchasing Worksheet*. Even though you may be buying a very old, rare item that is unlikely to be found elsewhere, you are still required to contact at least one other source. Note: the \$5,000 figure is subject to change. Contact your unit's staff familiar with purchases for the dollar amount.

4. For those who are buying objects listed in an approved furnishing/exhibit plan, the placement of furnishing plan reference numbers on purchase documents is a good idea, but optional. (See Sample Subpurchase Order, Figure 11.)
5. If the amount of the purchase exceeds \$15,000 (subject to change), you will be required to go through a procurement process that involves the Department of General Services. For assistance, contact Museum Services Section.
6. Depending upon the circumstances and the cost of the object, you use one of the following three methods to buy a collection item:
 - a) *DPR 40 Subpurchase Order*
 - b) *DPR 439 Petty Cash Voucher*
 - c) Cal Card

Samples of the three types of purchase documents follow.

Documentation

All documents surrounding the sale should be retained. In particular, a receipt, a bill of sale, or an invoice will serve as proof of ownership.

Make two copies of the purchase document. On the two copies mark the next two-part accession number on the top right-hand corner. Example:

794-10
794-11
→794-12

(For more information regarding Accession Numbers see this chapter pages 3.24–3.25.)

1. Send original receipts, invoices, etc., to your accounting officer.
2. Place copies of the sale documents in the object's own accession folder, along with any supporting information, related correspondence or provenance information.
3. Send a copy to Statewide Museum Collections Records.

DPR 40 Subpurchase Order
DPR 439 Petty Cash Voucher
Cal Card

(FIGURES 11, 12 & 13)

Sample Subpurchase Order

794-12

CALIFORNIA STATE PARKS
SUBPURCHASE/CONTRACT/DELEGATION ORDER (STD. 45)
DPR 45 (Rev. 12/97)

DEPARTMENT OF PARKS AND RECREATION
Fabled Valley Farm SHP
49 Meander Lane
Calkinell, CA 95860
Department Contact and Phone Number:
Christina Kudrins (707) 485-1151

DATE (Month, Day, Year)
06/03/99
PURCHASE REFERENCE NO.
Same as shipped to
VENDOR: This Number MUST Be Shown On Your Invoice.

COMPLETE ONLY FOR SMALL BUSINESSES WHEN TO BE USED AS VENDORS INVOICE
SMALL BUSINESS STAMP
I hereby certify that this is a true and just bill, and payment has not been received.
VENDOR SIGNATURE
Benson Fox
TITLE (Owner, Manager, Clerk, etc.)
Asst. Manager

Next accession number in your park's museum registration system

- (SEE VENDOR INSTRUCTIONS ON REVERSE)
- NOTICE TO VENDOR:
- Show the Agency Purchase Reference Number and Contract Delegation Number on your invoice.
 - Show cash discount offered on your invoice.
 - Submit invoice in triplicate. If not on printed bill head, vendor please sign invoice.
 - Submit original receipted expense bills if your invoice includes prepaid transportation charges.
 - All shipments shall be F.O.B. Destination unless otherwise stated.
 - No foreign-made equipment, materials, or supplies furnished to the state pursuant to this contract may be produced in whole or in part by foreign labor, contract labor, or indentured labor. By submitting a bid to the state or accepting a purchase order, the contractor agrees to comply with this provision of the contract.

Museum objects have customarily been assigned Commodity Code No. 9915 = "Collectors' Items."

LINE NO.	QUANTITY	UNIT	COMMODITY CODE	DESCRIPTION (Color, Size, Part No., Article, etc.)	UNIT PRICE	AMOUNT
1	1	ea	9915	Oval mirror, ref # 6.26	\$45.00	\$ 45.00
2	2	ea	9915	sideboards, pine ref # 2.A.57	475.00	950.00
3	1	ea	9915	table, oak ref # 7.B.62	376.00	376.00
4	1	ea	9915	bookcase legal ref # 4.A.1	450.00	450.00
5	1	ea	9915	bookcase, open, ref # 4.C.3	565.00	565.00

For all purchases over \$1,000, you must have a minimum of three bids even for rare items.

Reference numbers for objects listed in an approved furnishing or exhibit plan are recommended.

To Be Picked Up

ALTERNATE PRICE QUOTATION # 5138/99 No Bid
COMPANY NAME AND PHONE CONTACTS
Chandler's Trading Co.
ALTERNATE PRICE QUOTATION # 5139/99 No Bid
COMPANY NAME AND PHONE CONTACTS
Mary Jane's Legacy Antiques

EXPENDITURE CODING

BY	INDEX	OBJECT	PCA	AMOUNT	PRCL NO./AMT. PHASE
99	1789	961	40160	5705.36	

CALSTARS VENDOR NO. 810731213121119191912
(ASTD 204 must be on file in the Accounting Section to verify this number.)

APPROVED BY: Clayton R. Strong, District Superintendent
DATE: 6/3/99
RECEIVED BY: Christina Kudrins, Museum Curator 6/3/99

The Object Code is an internal DPR accounting number indicating the type of purchase. Typical object codes for museum objects are 861, if the objects are part of a capital outlay project, or 238 "Not Otherwise Classified Goods."

A CALSTARS Vendor ID number is required for all purchases. If the vendor does not have an ID number you will need to carry a STD 204 Vendor Data Record form with you to establish an ID for the company.

Figure 11

The Object Code is an internal DPR accounting number indicating the type of purchase. Typical object codes for museum objects are 861 if the objects are part of a capital outlay project or 238 "Not Otherwise Classified Goods."

Next accession number in your park's museum registration system

Sample Petty Cash Voucher

State of California — The Resources Agency
DEPARTMENT OF PARKS AND RECREATION
PETTY CASH VOUCHER

1794-16
DOCUMENT NO.

INDEX 1789	REPORTING UNIT NAME Fabled Farm SHP	CALSTARS VENDOR NO. 867492543679	DATE 6/6/99			
OBJECT	PCA	PROJECT NO./WORK PHASE	QUANTITY	ITEM	UNIT PRICE	AMOUNT
238	40160		1	postcard - fruit pickers 1898 ref. # 3.A.1	\$4.50	\$4.50
238	40160		1	postcard - fruit processing scene ref. # 3.A.2	3.00	3.00
238	40160		1	postcard - Fabled Farm fruit stand		
238	40160		1	in 1900 ref. # 3.A.3	5.00	5.00
			1	postcard - Tulareville 4th of July parade, 1900 ref. # 3.A.4	4.00	4.00
I certify that the above goods and/or services were received.					SUBTOTAL 16.50	
EMPLOYEE Chris Kudrinska					NAME OF FIRM Alexander's Books & Ephemera	
APPROVED Dotty Devine					SIGNATURE OF AUTHORIZED REPRESENTATIVE Grace Smith	
DPR 439 (rev. 8/94)					TOTAL 17.77	

Approval by your park unit's Petty cash fund custodian

Reference numbers for objects listed in an approved furnishing or exhibit plan are recommended.

A CALSTARS Vendor ID number is required for all purchases. Ask the person in your unit responsible for purchases how to proceed if the vendor does not have an ID number.

Fig .2

Sample Cal Card Documentation

INVOICE

794-20

Next accession number
in your park's museum
registration system

Mary Jane's Legacy Antiques
365 Main Street
Little Creek, CA 91297
(509) 475-3997

Date: July 3, 1999
Customer No: 005090

Sold Department of Parks and Recreation Ship Same
To: Fabled Farm SHP To:
49 Meander Lane
Oakknoll, CA 95860

Contact: Christina Kudrina:
Phone No: ((707) 485-1151

Ship Via: Our Truck
Ship Date: 7/6/99

Item	Unit Price	Total
Roll Top Desk, Oak <i>Ref. # 6.26</i>	\$3,500.00	\$3,500.00

Reference numbers for
objects listed in an approved
furnishing or exhibit plan are
recommended.

Payment Type: Credit Card
Amount Due: \$.00

Subtotal: \$3,500.00
Tax: 271.25
Total: \$3,771.25

Figure 13

Property Surveys (Transfers from Other State Agencies)

What Is a Property Survey?

The transfer of property from one state government agency to another is often called a “property survey.” The use of a property survey to acquire artifacts and specimens is uncommon; however, there are several things to remember, if the situation arises:

- Since every acquisition places demands on a unit’s resources, follow the basic steps you would for any acquisition. Verify that the object meets the requirements of the unit’s scope of collections statement. Apply the criteria for acquiring and declining museum objects. Obtain as much information as possible about provenance. Photograph the object and evaluate its condition.
- Acquisition by property survey, like all acquisitions into the museum collection, must have the signed approval of the District Superintendent, who bears responsibility for the museum objects in his/her district, or the Park Superintendent if authority for museum collections activities has been delegated to the park unit level. The signed approval may take the form of a letter or memo.
- The department or agency from which the objects originate will most likely use a *STD 158 Property Transfer Report* form, the standard form for documenting such transactions. (See pages 3.47– 3.49 for a sample *Property Transfer Report* (Figure 14).) Memos or other types of conveyance documents are acceptable as long as they contain the necessary information and the authorizing signatures.

Documentation

When all signatures have been obtained and the objects have been received, you will need two copies of the completed *STD 158* or other transfer document (an original and one copy.)

1. Assign a new accession number – the next available two-part accession number.

Mark the accession number on the top right-hand corner of the transfer document. (For more information about accession numbers, see Gifts, this chapter, pages 3.24-3.25.)

2. Place the original in the object's own accession folder, along with any correspondence, information relating to provenance, or other supporting information.
3. Send a copy to Statewide Museum Collections Records.

Transferring Objects from DPR to Other State Agencies

If there are museum objects that would be suitable for transfer from the Department of Parks and Recreation to another state agency or department, they must first be deaccessioned. (See Chapter 6, pages 6.75–6.84 for deaccession procedures.)

STD 158, Property Transfer Report

(FIGURE 14)

Next accession number
in your park's museum
registration system
794-13

STATE OF CALIFORNIA
PROPERTY TRANSFER REPORT
STD 158 (REV. 4/98) (FOR USE OF PHS, EXCEL, REV. 8/1998)

ENTERED ON PROPERTY RECORDS BY (Signature) _____

FROM (Department, Unit, or Office) **Governor's Office** LOCATION (Department, Unit, or Office) **State Capitol Sacramento** DATE **7/12/99** OCCASION NUMBER _____

TO **Department of Parks and Recreation** LOCATION **Fabled Farm SHP** CHECK TRANSFER TYPE
 INTRACAPT (SAME FUND) INTER-CAPT (SAME FUND) BETWEEN FUNDS

LINE	ARTICLE	EQUIPMENT NUMBER	ORIGINAL PURCHASE DATE	QUANTITY	TOTAL
1	The Harvesters, 1888, watercolor by R. D. Farnsworth		3/1/56	1	
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12	<i>Approved for acceptance into the collection.</i>				
13	<i>Clayton R. Strong, Superintendent</i>				
14	<i>August 15, 1999</i>				
15					

REASON FOR TRANSFER
 The Governor's Office is planning to replace all artwork currently hanging in the office hallways. The painting will become part of the permanent exhibit in Fabled Farm SHP's new visitor center.

APPROVED BY PROPERTY SURVEY BOARD	SIGNATURE	DATE SIGNED
	<i>Edwards Pelossi</i>	7/20/99
	<i>Kathryn Beckett</i>	7/20/99
	<i>Wing Fan</i>	7/20/99
REVIEWED BY DEPARTMENT OF GENERAL SERVICES	<i>Leonard Caskey</i>	7/30/99
RECEIVED THE ABOVE ITEMS FOR DELIVERY AS DIRECTED HEREIN	<i>Don Armer</i> (Reliable Movers, Inc.)	8/15/99
I HAVE RECEIVED THE ITEMS ABOVE	<i>Christina Kuchina, Fabled Farm SHP</i>	

Approval is required by the Superintendent to accession an object into your park's collection. A signature on an STD 158 or on a letter or memo will work equally well to meet the requirement.

Figure 14 — Sample STD 158, Property Transfer Report

Objects and Specimens Found On-Site

Types of Objects Found On-Site

You or others might find objects or specimens on park property that will need to be removed from their original location in order to preserve and incorporate them into the park's museum collection. Objects in this category might include:

- Park memorabilia (e.g., a fifty-year old park sign representing an earlier era of park history).
- Architectural remnants (e.g., a decorative bracket removed from a historic park building and kept for replication and study).
- Significant natural history specimens (e.g., a section of a giant tree felled on park property, kept for what its rings reveal).
- Archaeological artifacts found on-site outside of a planned Archaeological survey or project.

This category does not include:

- Plentiful and expendable natural history specimens that are used as interpretive program aids and have not been accessioned into the park's museum collection.
- Archaeological objects that are part of a planned excavation. (For further information on this topic see Archaeology Collections, Chapter 4, pages 4.11–4.14.)

Documentation

Gathering Information. Capture as much supporting information as possible, for instance, a photograph of the object in its original location, or oral histories obtained from knowledgeable park personnel.

Process Changes with Respect to Numbering. Prior to December 1996, all accessions acquired with state resources (purchases, transfers, and on-site finds) shared the same accession number of "1." These types of transactions are now assigned the next available accession numbers. Modifications to the numbering system were made to facilitate park record keeping and statewide automation.

Completion of a DPR 931, Objects and Specimens Found On-Site Step-by-Step

A sample form follows with numbered instructions that correspond to the instructions on the form (see Figure 15).

***DPR 931,
Objects & Specimens Found On-Site***
(FIGURE 15)

Instructions for Figure 15, *DPR 931 Objects & Specimens Found On-Site*

This sample illustrates the use of a *DPR 931* to record the accession of an object found on park property into the unit's museum collection.

1. Enter the park name and the building or area where the object was found.
2. Enter the date the object was found and the name and title of the person who found it.
3. Describe the specific site from which the object originated. If needed, attach a map showing the specific location, but avoid vague references like "2 miles up the Buttermilk Trail."
4. Explain the circumstances under which the object was discovered.
5. Describe the object or specimen. The description might include the name of the object, date of object, dimensions, materials, color, artist or maker, condition and information of historic interest.
6. Provide the details about how the object or specimen was identified and by whom.
7. Have the preparer sign in the designated space. Have the preparer type or print his/her name and date the form.
8. Obtain the collection manager's signature. Have the collection manager type or print his/her name and date the form.
9. Obtain the Superintendent's signature. Have the Superintendent type or print his/her name and date the form. The Superintendent's approval is required to accession artifacts or natural history specimens into the collection.
10. Assign an accession number and enter it in the upper right-hand corner. (For more information about accession numbers, see Gifts, this chapter, pages 3.24-3.25.)
11. Distribution of copies:
 - a. You will need two copies (an original and one copy).
 - b. File the copy with original signatures in its own numbered accession folder, along with any supporting information (e.g., additional information about the object's original location, oral history transcripts, etc.).
 - c. Send the second copy to Statewide Museum Collections Records.



CALIFORNIA STATE PARKS

Objects & Specimens Found On-Site

MUSEUM COLLECTIONS

State of California - The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

10. 794 - 14
Accession Number (if applicable)

1. Park	Building / Area
Fabled Farm SHP	Garcia Ranch House
Date found	Found by
2. October 9, 1998	Richard Workman, PMWI

Specific location at which objects were found (attach diagram or map if helpful):

3. Object found in the drawer of a lamp table located in the Garcia Ranch House living room.

Circumstances under which objects / specimens were found:

4. During the months of October-December 1998, the Garcia Ranch House underwent an extensive renovation. The lamp table was being removed for storage when the stereoscope was found in the drawer.

Description of objects / specimens:

5. Stereoscope. Date: June 11, 1901 appears on the handle. Manufactured by Underwood & Underwood, N.Y. Made of metal and wood. This inscription appears on tape affixed to slide: Edward T. Collins, 69 Granada St., Fresno, CA.

How were objects / specimens identified and by whom?

6. Object was identified by Christina Kudrina, Curator I at Fabled Farm SHP. At one time, Edward Collins owned a ranch adjacent to the LaRue property. He may have given the stereoscope to the Garcias or they may have purchased it from him.

7. Preparer's Signature	Preparer's Name and Title	Date
<i>Christina Kudrina</i>	Christina Kudrina	10/21/1998
<input checked="" type="checkbox"/> Approval for Accession into Museum Collection		<input type="checkbox"/> Not Applicable
8. Collection Manager's Signature	Collection Manager's Name	Date
<i>Christina Kudrina</i>	Christina Kudrina	10/21/1998
9. Superintendent's Signature	Superintendent's Name	Date
<i>Clayton R. Strong</i>	Clayton R. Strong	10/24/1998

DPR 931 (Rev. 4/99)(Encl. 4/23/1999) 11. Distribution: Park Files Statewide Records Resource Management Division (if applicable)

Figure 15 – Sample DPR 931, Objects and Specimens Found On-Site

Archaeological Artifacts Found On-Site

Occasionally objects are found on park property that once belonged to people who lived in or visited the area in the past. For example, a visitor discovers a projectile point or a construction crew digging postholes in the park comes across a very old bottle. Such discoveries are important, since they may reveal the location of previously unsuspected archaeological sites or features. If this is the case, the District or Service Center archaeologist should be notified. If the find results from ground-disturbing activity that for some reason is not being monitored by an archaeologist, the District or Service Center archaeologist should be notified immediately. (The Resource Management Directives require archaeological clearance of all ground-disturbing activities; any such work that may encounter buried resources is ordinarily monitored.) With this in mind, the discovery of archaeological objects found outside a planned excavation should be handled according to the instructions described in Figures 15 and 16.

***DPR 931,
Objects & Specimens Found On-Site
[archaeological object]***

(FIGURE 16)

Instructions for Figure 16

This sample illustrates the use of a *DPR 931* to record the discovery of archaeological objects on park property outside of any known archaeological site and to document the circumstances and location of the find.

Record the location and other circumstances surrounding the find as soon as possible by completing **steps 1-6**.

Do not obtain approval signatures or assign an accession number until you have contacted the district or service center archaeologist. The archaeologist can determine whether the object should be forwarded to West Sacramento for inclusion in the Department's archaeology collection under the jurisdiction of the Cultural Resources Division, or whether it is appropriate to accession the object into the park unit's collection.

If it is determined that the object should be incorporated into DPR's archaeology collection, check the box labeled "not applicable" in the line "Approval for Accession into Museum Collection" (**step 7**). Forward the object along with a copy of the completed *DPR 931* to the district or service center archaeologist for handling.

If it is determined that the object should not be incorporated in DPR's archaeology collection, you will have to decide whether it should be accessioned into the unit's museum collections.

If you decide to accession the object into the museum collections, complete **steps 8-12**.



Objects & Specimens Found On-Site

MUSEUM COLLECTIONS

State of California - The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

1a | 794 - 287
Accession Number (if applicable)

Park	Building / Area
1. Fabled Farm SHP	Eucalyptus Grove
Date found	Found by
2. April 15, 2000	Derek Neary with Ben's Tree Service

Specific location at which objects were found (attach diagram or map if helpful):

3. Two projectile points were found in the northwest corner of Fabled Farm's eucalyptus grove. See map.

Circumstances under which objects / specimens were found:

4. Fabled Farm SHP contracted with Ben's Tree Service to remove several downed trees in the park's eucalyptus grove. As the arborists were hauling away limbs, one of the men, Derek Neary, found two projectile points in a gopher hole.

Description of objects / specimens:

5. Projectile point: Gray 3.4 cm x 1.5 cm, serrated edges, possibly made of chert.
Projectile point: Gray 3.5 cm x 1.7 cm, serrated edges, possibly made of chert.

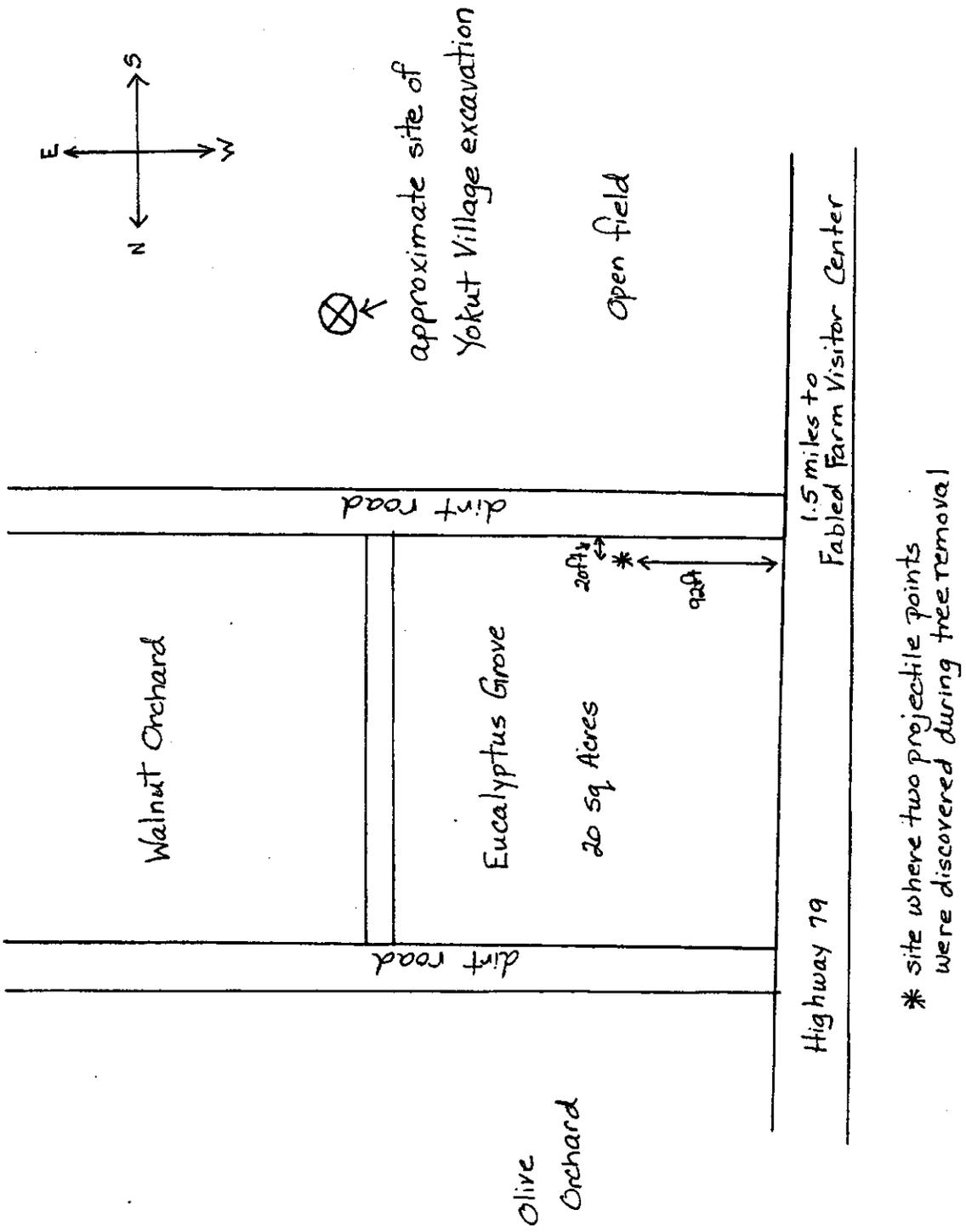
How were objects / specimens identified and by whom?

6. Objects were examined by Charles Smythe, District Archaeologist, while at the park on April 21, 2000. There have been archaeological site excavations at the park. Due to the strong possibility that the two points may be connected to one of these excavations, he advised that these two points should be forwarded to the State Archaeological Collections Research Facility (SACRF) in West Sacramento.

7. Preparer's Signature	Preparer's Name and Title	Date
	Johnny X. Valencia, Ranger I	4/15/2000
<input checked="" type="checkbox"/> Approval for Accession into Museum Collection		<input type="checkbox"/> Not Applicable
8. Collection Manager's Signature	Collection Manager's Name	Date
	Christina Kudrina	4/20/2000
9. Superintendent's Signature	Superintendent's Name	Date
	Clayton R. Strong	4/20/2000

DPR 931 (Rev. 4/99)(Excel 4/23/1998) Distribution: Park Files Statewide Records Resource Management Division (if applicable)

Figure 16 – Sample DPR 931, Objects and Specimens Found On-Site [archaeological object]



Resolution of Old or Abandoned Loans

What Is an Old or Abandoned Loan?

Many State Parks have objects in their possession that fall into the category of “abandoned loans.” An abandoned loan is a loan that the borrower is unable to return to the lender (owner). The two most common reasons for this situation are as follows:

- The lender has moved and failed to notify the unit of his/her new address.
- The lender has died and the lender's heirs or estate executor have failed to notify the unit of the new owner's name and address.

Abandoned loans are frequently a burden, since they divert storage, handling, and record keeping time and resources away from other collection items.

The Law

In 1984 (amended in 1985), California's “Old Loan” law (California Civil Code Section 1899.1 – 1899.11) went into effect. The law applies to all tangible objects except “botanical or zoological specimens loaned...for scientific research purposes.” It enables museums to legally terminate abandoned loans and, if necessary, to conserve or dispose of loaned property. Termination of a loan may result in an object's accession, sale, or other method of disposition.

In addition, Civil Code Sections 1899.1 – 1899.11 contain these stipulations:

- Limits the period within which a lender can reclaim property on loan. For loans with no specified expiration date the limit is 25 years if there has been no contact — verbal or written — between the unit and the lender. The limit is 7 years if the loan was made on or after 1/1/84. A lender can claim property loaned for a specified duration until the term of the loan has expired.

- Provides that when a lender's rights have expired, title to the property vests in the museum.
- Provides a legal method for dealing with objects of uncertain or undocumented status in the custody of museums for 25 years or more.

Notification and Documentation

When a lender abandons loaned objects, the Department is required to make a good faith effort to notify the lender according to the terms of this law. Documentation of this effort must be maintained permanently in the unit's records.

Prevention

The best way to deal with abandoned loans is to prevent them from developing in the first place. By following departmental policy (DOM 2010.6.5) which stipulates that loan periods should not exceed a two-year period, regular contact with lenders is assured. Also, conditions on the reverse of DPR forms *DPR 927, Receipt of Objects – Incoming* and *DPR 926, Loan Agreement – Incoming* refer to prescribed procedures lenders must follow to preserve an interest in loaned property.

Assistance

If you have old loans that need to be resolved, contact Museum Services Section for assistance.

Acquisition Checklist

You may find the following checklist helpful when you are acquiring objects for your unit by any means – gift, bequest, purchase, property survey, or object found on site.

Evaluation

- For all acquisitions, determine if the object under consideration is compatible with your park's Scope of Collections Statement.
- For all acquisitions, apply the criteria for accepting and declining museum objects outlined in the *Museum Collections Management Handbook*, Vol. II.

Communication

- If the acquisition is a gift or bequest, inform the potential donor or executor of DPR's acquisition policies and all the steps in the process – required forms, approvals, timelines, and names of staff members involved.

Documentation

- At the time of a gift offer or notification of bequest, complete an original and three copies of a *DPR 925, Deed of Gift* and have the donor or executor sign all four. Give or send one copy to the donor or executor as evidence of what he/she signed.
- If the object(s) is left in the park's custody for evaluation, complete a *DPR 927, Receipt of Objects – Incoming*.
- If a non-archaeological object or specimen is found on park property and would be an appropriate addition to the park's museum collection, complete a *DPR 931, Objects & Specimens Found On-Site* form.
- Gather as much information as possible about the object – who manufactured it, who owned it, how it was used, what associations it has with significant personages or historic events, etc.

- Prepare an inventory of the object(s). Provide enough detail to identify individual items and note their condition.
- If possible, photograph the objects.

Storage

- Clearly label and store any objects left in the park's custody for evaluation in a secure, clean, pest-free area with proper lighting, humidity, and temperature conditions. These items should be stored separately from collection items.

Declining a Gift

- If the object is not suitable for your unit, consider contacting other units or organizations to see if the object would be of interest to them for their collections.
- If it is decided the object is not appropriate for the unit, return the object with a verbal or written thank-you to the potential donor.
- If the object has been kept at the unit during evaluation, complete a *DPR 929, Release of Objects – Outgoing* to document its return.

Accepting a Gift

- Complete all the required documentation and obtain the necessary signatures. (Remember signature approval of the District Superintendent, or if delegated, Park Superintendent, is required for all accessions.)
- Determine the next accession number in the park's registration system and include it on all accession documents.
- File copies of the accession documents in your unit's files and send copies to Statewide Museum Collections Records.
- If it is a gift or bequest, send a copy of the completed *DPR 925, Deed of Gift* to the donor or executor along with a letter of appreciation from the District or Park Superintendent.

ACQUISITIONS WITH SPECIAL CONSIDERATIONS

The focus of Chapter 4 is on collections with legal or other special considerations that must be taken into account when acquiring and managing them.

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Natural History Specimens and Permits

General Requirements

Permits are required to possess species classified as threatened, endangered, or fully protected. Federal law also requires a permit for migratory birds, marine mammals, and all federally listed threatened and endangered species. To obtain information on the legal status (federal and state) of most amphibians, reptiles, birds, and mammals of California, you may access the Department of Fish and Game's (DFG) web page at: <http://www.dfg.ca.gov>.

- In column on left select "Statistics and Databases."
- Select "Complete CWHR (California Wildlife Habitat Relationships System) Animal Species List."

You may also request a copy of "A Checklist of the Amphibians, Reptiles, Birds, and Mammals of California" from your local DFG office.

All specimens currently in your collections that fall into the above categories should already have these permits. If they do not, you should obtain them as soon as possible. Note that acquiring permits from the proper authorities can be very time-consuming.

Permitting Authorities

State of California - Department of Fish and Game (DFG).

The *Fish and Game Code (FG Code)* and Fish and Game Commission (FGC) regulations require a permit to possess most species of wildlife. However, the FGC has authorized certain organizations, including the Department of Parks and Recreation, to possess accidentally killed and legally acquired wildlife specimens without a permit. This exemption does not include endangered, threatened, or fully protected species.

A permit must be obtained for each specimen of an endangered, threatened, or fully protected species. To request a permit, take these steps:

- Submit request on DPR letterhead.
- Include the following information:
 - Title (e.g., Resource Ecologist, Curator)
 - Name of park
 - Address of park
 - Telephone number.
- Include the following information about each animal:
 - Species of the animal
 - Source of the animal
 - Circumstances of the animal's death
 - How you came to possess it
 - Where the specimen is to be maintained.

You will be issued a permit with the provision that the specimen shall remain the property of DFG, and that you only retain custody of it.

Mail request to:

Department of Fish and Game
License and Revenue Branch
3211 S Street
Sacramento, CA 95816
(916) 227-2244

Such specimens should be accessioned into your collection using the appropriate form (i. e., *DPR 925 Deed of Gift*; *DPR 931, Objects & Specimens Found On-Site*; Purchase Document). You should note in the remarks section that while California State Parks retains custody of the specimen, it remains the property of DFG. A similar notation should be made in the remarks section of the *DPR 444 B Catalog Card*.

Federal Permits - U.S. Fish and Wildlife Service (USFW)

Migratory Birds

For mounts or salvage permits contact:

U.S. Fish and Wildlife Service Migratory Bird Permit Office
911 NE 11th Avenue
Portland, OR 97232-4181
Phone: (503) 872-2715

Eagles:

Eagles may not be retained in a collection unless they were obtained before 1995. If an eagle is turned in to a DPR facility, contact the nearest U.S. Fish and Wildlife office. USFW now turns over all eagle carcasses to Native Americans.

Sea Otters:

To request a sea otter permit, contact the nearest U.S. Fish and Wildlife office. You will need to provide:

- Request for permit on DPR letterhead, with the sea otter ID number assigned by Fish and Wildlife.
- Information on how the carcass will be prepared (live mount, pelt, study skin).
- Specify how the carcass will be used (interpretive/educational programs, displays, etc.).
- Describe where the carcass will be kept (and stored when not in use – name of facility).

National Marine Fisheries Service (NMFS)

Marine Mammals:

All species of marine mammals are protected under the Marine Mammal Protection Act, and some are also protected under the U.S. Endangered Species Act and the Convention on International Endangered Species. These laws prohibit taking, possessing, and transporting unlawfully taken specimens. These animals include whales, dolphins, porpoises, seals, sea lions, polar bears, sea otters, dugongs, and manatees.

To request a permit for a marine mammal, other than a sea otter, contact:

Coordinator of California Marine Mammal Stranding Network
National Marine Fisheries Service
501 W. Ocean Boulevard, #4200
Long Beach, CA 90802-4213
Phone: (562) 980-4017

Write the letter on DPR letterhead. Include the following information:

- The date, locality, and circumstances under which you acquired the specimen.
- The field # (if any) and species of the animal.
- Indicate that the specimen will be used for educational purposes.

Note that permits for sea otters are obtained from the U.S. Fish and Wildlife Service (see section above.)

Historic Firearms

Introduction

A number of laws and regulations affect the acquisition and storage of historic guns and ammunition and their use in exhibits and demonstrations. The following information is provided to DPR museum personnel so that they may assess their collections and comply with the law.

The Federal Gun Control Act

The Federal Gun Control Act defines what kinds of firearms and ammunition are subject to federal laws and restrictions. California law generally relies on those definitions. Most of the kinds of objects in museum collections are exempted, but some are not.

Artifacts Covered. DPR's interpretation of the Act definitions, based on the entirety of the Act, calls for the control of the following items:

Firearms

- All cartridge firearms (e.g., rimfire, centerfire), regardless of manufacture date.
- All firearms manufactured after 1898, including special purpose firearms such as starting pistols. (This requirement should not be construed to mean that guns manufactured before 1898 are exempt, since the *totality* of the Act indicates that all cartridge firearms are subject to restrictions.)

Ammunition

- All cartridges (e.g., rimfire, centerfire).
- All propellants used in firing firearms, including black powder or similar gunpowder used in ammunition.
- All percussion caps or ignition source items.
- All bullets or projectiles used in ammunition, such as lead balls.

Artifacts Excluded. Some guns (but not ammunition) are excluded from the Act. These weapons include:

- Antique firearms that use matchlock, flintlock, or percussion cap firing systems (i.e. those that use black powder as a propellant).
- Replicas of antique black powder guns that are contemporary in make but function as pre-1898 guns.
- Guns that have been disabled through removal of key mechanisms (e.g. firing pin, hammer) or obstruction of the barrel.
- Guns that require specialized ammunition that is no longer manufactured or available.
- Cannons.

Firearms Transactions

Purchases. Since 1991, only federally-licensed businesses or individuals may legally sell or transfer title to firearms and/or ammunition covered by the Act. Under California law the owner who is selling or giving away the firearm/ammunition is responsible for ensuring compliance with the Act. In cases of noncompliance, the buyer or recipient will not have legal title to the gun/ammunition. (California PC 12078 1/1991)

To comply with the law, firearm and ammunition transactions must be handled through a Federal Firearms Licensee, typically a commercial gun dealer. The Licensee confirms that the firearm is not stolen and adds it to a national database of registered firearms. There is a modest fee for the service. This is the quickest and simplest means to complete the transaction. However, the DPR's Public Safety Section under the Field Services Division can fulfill the legal requirement through other means. Contact them directly if you have any questions or special circumstances.

Donations. A Record of Sale must be secured for donated firearms and ammunition not exempted from the Act. This rule applies to donations by individuals and transfers of ownership from other museums or government agencies. The fact that no money is exchanged isn't relevant; the transfer of ownership is. The documentation from the Federal Firearms Licensee must be permanently retained in the accession file. This documentation is in addition to the DPR 925, Deed of Gift form executed for all objects donated for museum collections.

Firearms Acquired Prior to 1991. Only firearms or ammunition acquired after 1991 are subject to processing through a Federal Firearms Licensee. Firearms acquired prior to 1991 need not have documentation by a Firearms Licensee as long as they remain in DPR ownership.

Theft of Historic Firearms That Are Exempt from the Act. The database of stolen firearms that is used in this registration program may include any stolen firearm, even the historical firearms exempt from the law. Contact the DPR's Public Safety Section for assistance in getting a stolen firearm in the database.

Deaccession. If a deaccessioned firearm from DPR's museum collections is transferred to a new owner, the transfer must be processed through a Federal Firearms Licensee. This procedure applies even if the object is given to another museum or public agency. A copy of the documentation from the Federal Firearms Licensee must be permanently retained in the deaccession file.

Domestic Violence Firearms Prohibition

It is illegal for individuals who have had a domestic violence conviction to possess firearms or ammunition, or for anyone else to provide them access to firearms and/or ammunition. DPR's policy for controlling access to firearms and ammunition in State Parks is outlined in Department Notice 97-30, August 15, 1997 (attached). The procedures include a self-identification and certification form that must be completed in advance of access.

Persons Covered. DPR will not provide access to firearms and/or ammunition (or cause access to be provided) to anyone who has not been certified. This list includes:

- Employees and volunteers.
- Persons who have keys or security codes to restricted facilities housing firearms or ammunition.
- Persons who have temporary access to firearms/ammunition for cleaning, conservation, or exhibit planning.

Museum Collection Managers and others who have access to guns and/or ammunition in museum collections *are included* in the prohibition. Firearms exempted from the Act (see above) *do not require* restricted access for purposes of the Domestic Violence Firearms Prohibition, although restrictions are usually prudent for other reasons. In many museum settings, it will be the black powder supply and not the guns themselves that *require* restricted access.

Means of Restricting Access. There must be physical barriers to prevent unauthorized access to firearms and/or ammunitions. Verbal instructions or admonishments are not adequate. In museum situations, the following are typical means of restricting access:

Securing Objects in Storage

- General storage area — Keys /security codes to room restricted to certified persons only.
- Locked — Keys to cabinet restricted to certified persons only. Allowing uncertified persons entry to general storage area (or not) depending on other security considerations.

Securing Objects on Exhibit

- In exhibit case — Keys to exhibit case lock restricted to certified persons only.
- On display panel or in vignette — Gun mounted very securely and removable only through locking device or other security feature, control of which is restricted to certified persons only.

Preventing illegal access, although desirable for other obvious reasons, is not a requirement of the Domestic Violence Firearms Prohibition. For example, a locked glass exhibit case is considered to provide restricted access, even though someone might break the glass and steal the gun.

Confirming Certification. Before providing access to a DPR employee or volunteer, confirmation that the individual has been certified according to DPR policy by the District should be obtained from a supervisor in his or her park or unit. In addition to the Federal Gun Control Act, other codes and state administrative laws that prohibit state employees from having firearms at work should also be considered.

Transfer of Custody. In the course of museum business, there may be occasion to release DPR-owned historic firearms to entities outside of DPR. This release cannot be done without first confirming that the other entity is taking responsibility for complying with the law, or that the individuals involved have been certified according to Departmental Notice 97-30.

- Outgoing loans — As one of the conditions of the loan, a statement that the borrowing institution “will comply with all applicable State and Federal laws and regulations” should be typed on the *DPR 928 Outgoing Loan Agreement* form.

-
- Conservation — A statement saying that the conservator will “comply with all applicable State and Federal laws and regulations” will be included in the contract for services. In addition, such language should be typed on the *DPR 929, Release of Objects –Outgoing* form, as a condition of the release of a firearm into the custody of another.
 - Courier acting as an agent for DPR — If the firearm is in a sealed box to which the private courier or delivery person has no legal access, it is not necessary to certify the individual.
 - Courier acting as an agent for another — If the courier is an employee or agent of an institution or business that has agreed under contract to comply with the law, it is the responsibility of the museum or business to certify its employees and agents.

Firearm Demonstrations. Access to firearms and ammunition covered by the Act during interpretive programs in State Parks requires controls to be in place *before* firearm demonstrations are given. Both the ownership and distribution of controlled items are at issue.

When firearms and ammunition are owned by DPR:

- Procedures must be in place to restrict access to certified individuals only *before* firearm demonstrations take place.
- Those DPR employees and volunteers who have been certified to have access may not provide access to other staff, volunteers, or visitors who have not been certified.
- In many cases, like musket and cannon demonstrations, it will be the black powder and ammunition, rather than the firearms, that must be controlled.

When firearms and ammunition are owned by an individual or organization other than DPR:

- It is permissible for an employee or volunteer to bring his own black powder *for his own use* in a State Park program without certification because DPR does not own it and is not involved in providing access.
- The employee or volunteer would be violating a law if he/she provided access for another program participant with a domestic violence conviction, so the requirements of the law should be made clear to all involved.

- DPR may not facilitate formal or informal distribution of black powder owned by others amongst program participants, because that would involve the Department in “providing access.”
- For activities conducted in the park by a non-DPR organization or individual under a Special Event Permit, it is the responsibility of the permit holder to ensure compliance with law.
- All Special Event Permits should include a statement saying the permittee “will comply with all applicable State and Federal laws and regulations regarding firearms.”

For More Information

If you have questions or concerns about the use of historic firearms, consult a Supervising Ranger or Superintendent in your district, or the Public Safety Section at Headquarters in Sacramento.

Archaeology Collections

Defining Archaeology Collections

Archaeology is the scientific study of the material remains of past human life and activities. Examples include:

- The excavation of ancient villages, historic features, and shipwrecks.
- The analysis of artifacts.
- The documentation and analysis of rock art, historic buildings, and historic landscapes.

Museum collections managers need to be aware of the differences in the way the Department manages archaeological collections and the way it manages other museum collections.

Most of these collections have been acquired as a result of formal excavations or systematic surface collections for scientific purposes. Other artifacts have been donated or have been found on park land. (See *Objects & Specimens Found On-Site*, Chapter 3, page 3.56.) The archaeological collection includes not only artifacts, but also plant and animal remains, architectural specimens, and even soil samples (saved for future soil chemistry, pollen studies, or extraction of microscopic remains).

Responsibility for Archaeology Collections

The Cultural Resource Division (CRD) establishes policies and procedures relating to the Department's archaeology collections. The collections themselves are located in West Sacramento.

The State Archaeological Collections Research Facility (SACRF) houses newly acquired archaeology collections that are part of ongoing archaeological projects conducted by the Cultural Heritage Section (CHS). The objects are assembled, brought back from the field, cleaned, cataloged, analyzed, and prepared for long-term curation.

SACRF is in fact the primary repository for more than one million objects derived from archaeological excavation, monitoring, and surveys conducted by the Department. These objects form the single most representative sample of material from archaeological sites found in the State of California. The SACRF also manages the field records, maps, catalogues, and photographs associated with the excavations that produced the objects. Though the majority of the Department's archaeology collections are housed in the West Sacramento facilities, many park units have archaeological objects in their collections.

You should note that these collections do not include human remains and associated funerary objects. The SMRC (State Museum Resource Center) is the Department's repository for objects in DPR's possession subject to NAGPRA (Native American Graves Protection and Repatriation Act of 1990).

Numbering Archaeological Sites and Collections

Archaeological sites are assigned a three-part, unique identification number called a "trinomial" which indicates the state, county and site number (i.e., CA-HUM-129 refers to the one hundred and twenty-ninth site recorded in Humboldt County, California). Site numbers are assigned by one of eleven regional California Historical Resources Information Centers through a program administered by the Office of Historic Preservation.

All materials scientifically retrieved from an archaeological site are considered archaeological collections. The State Archeological Collections Research Facility is responsible for assigning accession numbers for all DPR archaeological collections. Documents maintained under the accession number will indicate pertinent information about the whole collection. Such information would include the project name, the principal investigator, the year the project was done, and the site trinomial, as well as detailed records describing the site and the investigation procedures used, and a catalog briefly describing each artifact and giving its exact original location.

The accession number is normally a "P" followed by several numbers (P-XXX). The "P" stands for the "Parks and Recreation Archaeological Catalogue System." All collections must be cataloged for proper curation, storage, and retrieval of information. During the process of cataloging, a second numerical segment, a "lot number," may be added between the accession number and the individual specimen's number. The lot number is typically used for all the specimens from a feature or some other specific context. Whether or not a lot number is used, the exact location or provenance of each artifact or specimen is recorded on the archaeological catalog.

Excavation and Permit Requirements

Any non-DPR person, business, or institution wanting to perform an archaeological excavation, survey, investigation, or collection within the State Park System must complete form DPR 412A (Application and Permit to Conduct Archaeological Investigations/Collections) which can be obtained through the Cultural Heritage Section (CHS) in Sacramento. This application is reviewed by SMRC, the District Resource Ecologist, District Archaeologist, Service Center Archaeologists, the Cultural Heritage Supervisor, and the District Superintendent. Depending on the nature of the proposed project, it is possible that a CEQA (California Environmental Quality Act) review may also be required. Preservation of archaeological materials “in situ” is the Department’s first priority.

The Department does not encourage the collection of artifacts in State Park System units. If a site is threatened by development, then a formal study, under the direction of a State Park archaeologist, is required to insure that all necessary archaeological information is documented. If a site is endangered as the result of a natural disaster, erosion, or other occurrence, State Park archeologists evaluate the site and develop a site management plan with impact mitigation recommendations. Such impact mitigation might include revegetating, designating a site as “off-limits,” and/or altering the course of a trail.

DPR employees, other than authorized archaeologists, cannot conduct an archaeological excavation, survey, investigation, or collection within the State Park System without consultation with a Senior State Archaeologist in the Cultural Heritage Section of the Cultural Resources Division. Additionally, no underground work, whether original or maintenance, may be undertaken in the State Park system until clearance is given by a Department archaeologist. Emergency work required to protect the public health and safety may be undertaken without prior clearance, provided concurrent notice of the crisis is made to a Department archaeologist.

State and Federal Laws That Govern Cultural Resources

It is illegal to knowingly excavate, deface, destroy, or remove historic and prehistoric artifacts on public land. Evidence of past human activities or other cultural remains more than fifty years old should be reported to a park ranger. (For further information about the procedures for handling and recording archaeological artifacts found on-site see Chapter 3, pages 3.56–3.60.)

Human Remains

If human remains are found, they must be reported immediately to the county Coroner's Office. If the Coroner determines that the remains are Native American, the Native American Heritage Commission in Sacramento will be notified. The Commission will in turn identify a most-likely descendant, who will make recommendations for the treatment and disposition of the remains and any associated grave goods. (See NAGPRA, this chapter, pages 4.19–4.24.)

Paleontology Collections

Defining Paleontology Collections

Paleontology is the study of preserved organisms and their traces from past geologic times or, more concisely, the study of fossils. DPR's paleontology collection is comprised of fossil specimens acquired and conserved because of their scientific significance and educational value. Examples include fossils of vertebrates, invertebrates, plants, pollen, spores, and footprints.

DPR's Paleontology Collections

Most of the Department's paleontology collections have been acquired as a result of formal excavations or systematic surface collecting for scientific purposes. Most of the fossils have been found on park lands in two units: Anza-Borrego Desert SP and Red Rock Canyon SP. Some fossils in the Department's collections have been acquired through purchase or gift.

Red Rock Canyon's paleontology specimens have been curated and are housed at the Vertebrate Paleontology Section of the Natural History Museum of Los Angeles County. Anza-Borrego's collection is housed at three locations: the Stout Research Center at district headquarters, Borrego Springs, the Vertebrate Paleontology Section of the Natural History Museum of Los Angeles County, and U.C. Berkeley.

The Stout Center is also a designated federal repository for fossils belonging to the Bureau of Land Management. The collection consists of paleobiologic specimens, plants, marine and fresh water fossil invertebrates and marine and terrestrial fossil vertebrates. Collection accessories and support data include field notes, photographs, maps, drawings, and GIS (Geographic Information System) locational data, correspondence, published scientific papers, and archival documents.

Numbering Paleontology Collections

Numbering Large and Unique Paleontology Collections. At Red Rock Canyon and Anza-Borrego Desert, the paleontology collections are numbered differently than the way other museum collections are numbered in the Department. For instance, at the Stout Research Center paleobotanic, marine and fresh water fossil invertebrates, and marine and terrestrial fossil vertebrates are curated and stored as three separate collections: botanic, invertebrate, and vertebrate. Each is organized internally by local paleoflora or fauna, locality and number, and specimen number. Numbering follows international paleontological collection protocols with DPR standard museum prefixes.

Numbering Individual Paleontology Specimens Donated or Found On-Site.

As you will learn from reading the next section on “excavation and permit requirements,” it is not permissible for visitors or employees to collect paleontology specimens without a permit. It occasionally happens that a visitor or staff member, unaware of this restriction, finds a fossil on park property and turns it in to a ranger or at the park office. Individual objects like this that are found on-site or donated should be handled like any typical accession. For example, if your park is given a “mammoth tooth” or a visitor turns in a rock containing a fossilized marine invertebrate that he found on a hike, you would process both items like you would other accessions.

For the tooth, you would complete a *DPR 925, Deed of Gift* (See Chapter 3, Gifts, pages 3.17–3.34) and assign the next two-part accession number to it. For the marine fossil, you would complete a *DPR 931, Objects & Specimens Found on Site* form (See Chapter 3, Objects and Specimens Found On-Site, pages 3.51–3.60) and assign the next two-part accession number to it.

The donated mammoth tooth and the marine fossil would then each be assigned a standard, three-part catalog number. (For further information see Catalog Numbers, Chapter 5 Registration, pages 5.13–5.14)

What if you find a set of bones from one animal — a set of whale bones, for instance? You would prepare a single *DPR 931, Objects and Specimens Found On-Site* form, assigning a “set” number to describe the whole group of bones: Example, 794-13-1.set. You would then assign each bone a separate catalog number: 794-13-2, 794-13-3, 794-13-4, etc. Each catalog record whether entered on a catalog card or electronically should cross reference the set number: 794-13-1.set. This method enables you to name, describe, and label each element of the whale’s skeleton and relate the elements to each other.

Excavation and Permit Requirements

District Superintendents are responsible for the museum objects in their jurisdiction and for implementing the Department's policies and procedures relating to those collections. Consequently, District Superintendents are responsible for administering the permit process for collecting paleontology specimens within their districts. At the time of this writing, the Colorado Desert District is the only one in which that responsibility has been delegated to a staff member, who serves as District Paleontologist.

Collecting permits are issued only to official representatives of reputable scientific or educational institutions and governmental agencies. Permits are not issued for private collecting or for general classroom collecting. Collected specimens are used only for scientific and educational purposes. Commercial use and use for personal profit are prohibited.

Collection of specimens for paleontologic research by DPR employees and others is subject to the terms of *DPR 412P, Application and Permit to Conduct Paleontological Investigations/Collections*.

Staff and visitors who observe paleontological resources must report them to the District Superintendent or District Paleontologist who will evaluate them and determine the necessary protective measures to take. Any collecting activities that require subsurface excavation must also undergo CEQA (California Environmental Quality Act) review.

State and Federal Laws Governing Paleontology Collections

Those who collect without a valid permit or otherwise disturb paleontological sites are subject to criminal penalties. DPR regulations do not distinguish between plant, invertebrate, or vertebrate fossil resources as do federal practices and the SVP (Society of Vertebrate Paleontology). The Public Resources Code stipulates (PRC, Division 5, Chapter 1.7, 5097.5):

No person shall knowingly and willingly excavate upon, or remove, destroy, injure, or deface, any historic or prehistoric ruins, burial grounds, archeological, or vertebrate paleontological site, including fossilized footprints, inscriptions made by human agency, or any other archeological, paleontological or historic feature, situated on public lands, except with the express permission of the public agency having jurisdiction over such lands.

Repatriation and the Native American Graves Protection and Repatriation Act of 1990 (NAGPRA)

The Law's Provisions

The Native American Graves Protection and Repatriation Act, frequently referred to as NAGPRA, was passed by Congress and signed into law in 1990. All museums and agencies that receive any form of federal funding are required to comply with NAGPRA. The law's provisions:

- Establish procedures and legal standards for the repatriation or return of human remains, funerary objects, sacred objects, and cultural patrimony. The law applies to federal agencies, certain museums, educational institutions, state, and local entities.
- Recognize that Native Americans have certain rights in regard to burial sites located on federal and tribal lands.
- Establish an advisory committee to accomplish the purposes of the act and provide avenues for funding projects that lead to compliance with the law.
- Articulate methods for enforcing compliance with the law.

Practically speaking, it is good to remember that some DPR sites may not have collections subject to NAGPRA while others have significant holdings affected by the law.

Who and What Are Covered?

NAGPRA regulations apply to federally recognized Native American groups, Native Hawaiian organizations, and lineal descendants of deceased members of any of these groups.

For the Department of Parks and Recreation, NAGPRA applies **only** to artifacts currently in DPR collections. “New finds” are not subject to NAGPRA regulations but should be reported to the Ranger. See “What is the Collections Manager’s Role?” below.

The law applies to the following:

- **Human remains** defined as the “physical remains of a body of a person of Native American ancestry.” Examples include whole or partial skeletons, isolated bones, teeth, scalps, and ashes.
- **Funerary objects** defined as objects that “as part of the death rite or ceremony of a culture, are reasonably believed to have been placed with individual human remains either at the time of death or later.”
- There is a further distinction between **associated funerary objects** (objects for which the human remains and funerary objects are in the possession or control of the agency or museum) and **unassociated funerary objects** (objects for which the human remains are not in possession or control of the agency or museum). Examples include beads, shards, pottery jars, and/or tools.
- **Sacred objects** defined as “specific ceremonial objects which are needed by traditional Native American religious leaders for the practice of traditional Native American religions by their present day adherents.” Examples include medicine bundles, pipes, rattles, and prayer sticks.
- **Object(s) of cultural patrimony** defined as “an object having ongoing historical, traditional, or cultural importance central to the Native American group or culture itself, rather than property owned by an individual Native American and which, therefore, cannot be alienated, appropriated, or conveyed by any individual regardless of whether or not the person is a member of the Indian tribe....” Examples include medicine bundles, ceremonial masks, and rattles.

DPR's Compliance with Federal Reporting Requirements

DPR's compliance with NAGPRA has been accomplished in three stages:

- In June 1992, the DPR Committee on Repatriation (COR) sent summaries of DPR collections containing Native American human remains and associated funerary objects to Native American individuals and groups throughout California.
- In November 1993, ethnographic summaries were sent to Native American groups in California and throughout the United States. The summaries were of ethnographic collections held by DPR which may contain cultural objects (unassociated funerary objects, sacred objects, or objects of cultural patrimony) that were identified as being manufactured or used by members of Indian tribes. The National Park Service, administrator of NAGPRA, designated the groups that received this information.
- In May 1998, DPR sent letters to federally recognized tribes that were determined to be culturally affiliated with human remains held by DPR. Cultural affiliation, determined by COR, means that there is "a shared relationship of group identity which can be reasonably traced historically or prehistorically between a present day Indian tribe or Native Hawaiian organization and an identifiable earlier group." The tribes receiving letters were invited to consult with DPR about objects that might be subject to repatriation.

What Is the Collections Manager's Role?

To assure compliance with NAGPRA regulations, DPR has adopted detailed procedures that involve DPR staff in a variety of capacities. The Director appoints a Committee on Repatriation (COR) to review claims under NAGPRA. Compliance with NAGPRA is coordinated on a statewide basis by the NAGPRA Coordinator in the Museum Services Section, Cultural Resources Division.

Each district has an appointed NAGPRA Liaison. The Liaison's duties include becoming familiar with DPR's repatriation policies and procedures and assisting the NAGPRA Coordinator in facilitating consultations with tribes. Designated Collections Managers often serve as NAGPRA Liaisons.

Many traditional collections management responsibilities are involved in complying with the terms of NAGPRA. They include:

- Information management
- Collections care
- Deaccessioning
- Packing/shipping
- Storage
- Access
- Careful, thorough documentation

What to Do If . . .

Although the following circumstances are not your responsibility as Collection Managers, they are included here because you may be asked how they should be handled. Remember that NAGPRA applies only to burials already in DPR's collections – not to “new finds.” Also, it helps to remember that human remains are just that — the remains of a human being who died. Approach all circumstances with the level of care, sensitivity, and respect a proper funeral deserves.

Human Remains or Burial Items Are Found in Your Park:

- It is illegal to excavate, deface, destroy, or remove prehistoric Native American materials from public land.
- Such illegal activities should be reported to the Park Ranger, DPR Archaeologist, or Superintendent.
- Give any objects that have been collected to the Ranger.
- If human remains are discovered, the Ranger will contact the county coroner. The coroner has two working days to determine whether or not the remains are Native American. If it is determined that they are Native American, the Native American Heritage Commission (NAHC) in Sacramento must be notified within 24 hours. The Commission will identify a most likely descendant who has 24 hours to recommend how the remains will be treated. If the most likely descendant does not make recommendations within this time, the remains may be reinterred in a secure area at the park. The NAHC will mediate any conflicts in this area.

A member of the public wants to donate a human skull that he recently discovered in his garage:

- Do **not** accept human remains or burial goods of any type, even if they were collected prior to when the protective laws were adopted.
- Refer the person to the county coroner and the NAHC, if the remains are thought to be Native American.

A Native American or other group contacts you seeking permission to bury human remains and associated artifacts at your park:

- Refer the group to the Superintendent. The Superintendent will evaluate requests on a case-by-case basis in terms of their appropriateness and DPR's ability to provide adequate protection for a burial site.

A local family approaches you about scattering a relative's ashes in your park following cremation:

- As of January 1, 1999, DPR allows the scattering of cremated human remains in certain parks. Permission must be obtained in advance from the park Superintendent.

You discover human remains in your collection:

- **All** human remains, of any ethnicity, in DPR's collections should be reported to the NAGPRA Coordinator. Remains will be transferred to the burial collection storage area in West Sacramento. Non-Native altered specimens (e.g. teeth incorporated into a piece of jewelry, hair wreaths) may stay at your park if you wish and need not be reported.

Where Are the Department's Human Remains Stored?

All human remains and associated funerary objects in possession of the Department — regardless of ethnicity — are maintained in separate storage at the State Museum Resource Center (SMRC) in West Sacramento. Non-burial portions of burial-related archaeology collections are also kept in this facility, pending repatriation consultations.

For Assistance

If you have questions regarding NAGPRA, contact the NAGPRA Coordinator in Museum Services Section at (916) 653-7976. The Native American Heritage Commission in Sacramento can be reached at (916) 653-4028.

REGISTRATION

Part 5 of this *Handbook* describes California State Parks' registration system, a system that documents the entry of objects into the Department's museum collections, captures their provenance, and tracks all subsequent activities involving them.

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CHAPTER 5

The Registration System

What Is Meant by Registration?

Registration is the means by which curatorial staff documents objects and activities and relates them to each other. These records are often as important as the objects themselves for the information they contain about provenance and historic significance. The registration process is central to the management of a museum collection, as well as objects held on loan or in temporary custody.

Keep in mind that the instructions in this section primarily pertain to collections other than archival materials, which are handled differently.

Responsibility for Records Management

Park: Each park administers its own registration system. The park is the primary repository for documentation of museum objects or activities involving museum objects within its jurisdiction.

Statewide Museum Collections Records (SMCR): SMCR is housed in Museum Services Section, Cultural Resources Division in Sacramento. SMCR maintains the headquarters' copies of museum collection records for field units. It provides a means of tracking and assessing objects on a statewide basis and serves as backup protection against catastrophe or other loss of records at a park.

Sites with Multiple Registration Systems

Some park units require more than one registration system. For instance, a park with several beaches and campgrounds and one visitor center would probably have only one registration system for all museum objects within the park. A park featuring a historic town, on the other hand, might have a number of

museums or buildings whose large and distinct collections warrant their own registration systems.

Protecting Registration Files

Registration records should be kept together in a safe and secure place. To protect the paper records in your park unit:

- Restrict access to registration files to staff who work with them directly.
- Store files in locking file cabinets.
- Establish a system of key control to room and cabinet locks.
- Utilize sign out cards when files are removed.
- If possible, print forms on acid-free paper and file registration documents in acid-free file folders.
- Send copies of forms and inventories to Statewide Museum Collections Records to insure that there are backup copies off-site.
- Keep a second copy of your museum's Accession Book off-site, preferably at a location in or near the park unit in order to keep the second copy up to date.

The Electronic Registration System

DPR Policy Regarding Electronic Collections Management

It is the Department's policy to utilize to the fullest extent the electronic and communication technologies available to manage its museum and scientific collections. Ultimately, the goal is to have all of the Department's museum and scientific collections entered into a centralized statewide database, a database that will be accessible throughout the State Park System.

The Department's registration system was established according to common museum practices when all record keeping was done on paper. Whether the medium is paper or computers, though, the same registration information must be recorded.

Advantages of Electronic Collections Management

Although a manual record system is relatively simple to create, it is extremely difficult and time consuming to retrieve information efficiently, particularly for a collection as large, varied, and dispersed as DPR's museum collection.

Among the many advantages of an electronic system is the ability to do the following:

- Conduct searches of DPR's collections statewide or searches of the collections in selected park units using any field or combination of fields.
- Produce printed reports.
- Back up park records frequently.
- Conduct inventories faster and more efficiently.
- Reduce the need for storage space for paper records, as catalog cards, inventory forms, and Accession Books are no longer needed. (However, existing records are always kept.)

- Provide on-line images along with written information.
- Conduct research through read-only access to records in other park units.
- Easily discern relationships, if they exist, between objects.
- Reduce the need for duplicate entry of information.

Retention of Specified Paper Records

Although electronic registration eliminates the need for many types of paper records, there are some documents that will always be a permanent part of a park's registration system, including:

- Legal documents such as Deeds of Gift, Incoming and Outgoing Loan Agreements, and Wills.
- Documents requiring approval signatures such as Park to Park Transfers, Authorizations for Extended Hands-on Use, Objects & Specimen's Found On-site forms, Receipts and Releases of Objects forms.
- Documents too lengthy or cumbersome to enter into the computerized file, such as condition reports or publications.

Chronology of DPR's Computer Systems for Museum Collections Management

The Department first initiated the use of electronic collection management in Fall 1988. Since then DPR has taken advantage of new developments in electronic and communication technologies. The following description describes the evolution of DPR's computer system for museum collection management.

Argus

From 1988 to spring 2002, classic Argus was California State Parks' official computer software program for museum collection management. Developed by Questor Systems, Inc, it was designed to manage many types of museum collections — art, historical, natural science, anthropology, photographic, and archival collections. Argus provided basic data screens for objects or

specimens, as well as specially designed screens for detailed records pertaining to acquisitions, conservation history, loan history, exhibition history, and other museum collection activities. In addition, an imaging feature allowed photographs to be linked to individual records in the database.

There were two versions of Argus used in the State Park system — UNIX Argus and DOS-Argus. The UNIX Argus program was a multi-user system that ran on the UNIX operating system. The UNIX Argus program consisted of one UNIX machine connected to many workstations by wiring and/or modems. The Department's first UNIX Argus system was purchased in 1988 for use at the Central Collections facility in West Sacramento. It was expanded to handle collections in the nearby Archeology Laboratory. Other subsequent UNIX Argus systems were added for Hearst Castle, Antelope Valley Indian Museum, and Museum Services Section.

DOS-Argus

DOS-Argus was developed in 1993 as a single-user system to run on a personal computer with the DOS or Windows operating system. Questor Systems, Inc. developed DOS-Argus specifically for California State Parks to be used at field units where a simpler and less expensive version of Argus was needed. It allowed field units to automate collection management functions using the "Classic Argus" program, but it had no imaging or networking capability. Many park units ran DOS-Argus on laptop computers, allowing staff to conduct inventories, cataloging, and other activities in exhibit and storage facilities throughout the park.

Statewide Argus

In 1994 a UNIX Argus system was set up to function as the Department's centralized museum collection database. The Statewide Argus system represented an accumulation of museum collections records from collections located throughout the State Park system. Records were imported to the Statewide Argus database from all of the Department's DOS-Argus and UNIX Argus systems. Eventually the Statewide Argus system replaced the separate Argus systems at most park units by providing connections to a central Argus database for all DPR units. A number of separate UNIX Argus systems continued to operate independently, but regularly exported records for inclusion in the statewide system.

The Museum System (TMS)

In 2001 DPR selected The Museum System (TMS) as its new collections management software system for documentation of the Department's museum and scientific collections, archival collections, and image collections. The Museum System replaces all of the Department's existing Classic Argus systems. It is DPR's new standard for accessioning, cataloging, inventory, loan documentation, and all other collections management and associated sites documentation. TMS is scheduled to be installed as a statewide database with connections available through the DPR LAN/WAN and/or dial-up connections via the Internet by spring 2002.

Statewide Data Base Administration

Museum Services Section, Cultural Resources Division in Sacramento is responsible for the administration of DPR's statewide database. For information regarding The Museum System (TMS) or other questions relating to electronic registration, call the TMS Help Line at (916) 654-7666.

Basic Steps in the Registration Process

Elements of a Park Registration System

A typical park registration system contains the following types of records:

- Accession Book
- Activity Records (Accession Folders, Outgoing Loan Folders, Transfer Folders)
- Object Records (Catalog Cards, Catalog Folders)
- Source Cards (Donor Cards)
- Location Charts

Basic Steps in the Registration Process – Manual Version

Once the decision has been made to accept an object into the museum collection, these are the basic steps to follow:

1. Accession the object – Assign the next sequential accession number and record it in the Accession Book with a brief description of the object.
2. Prepare and file an accession folder labeled with the new accession number. Place all official documents, correspondence, and photographs associated with the accession process, together with other related information in this folder.
3. Assign catalog numbers to the objects in the accession.
4. Prepare a Source Card and file it alphabetically by the last name of the individual or company who donated the object.

5. Prepare a DPR 444A Catalog Worksheet. Measure, describe, and record the primary information about the object.
6. Place a catalog number on each object.
7. Photograph the object.
8. Prepare a DPR 444B Catalog Card: file and distribute copies. (For further information, see Chapter 7 Cataloging.)
9. Add the object to an exhibit or place it in storage.

After you have completed the registration process, museum objects can be located by using the donor's name, the catalog number, the object type, or the physical location. Records are filed at two locations – the park unit and Statewide Museum Collections Records at headquarters.

Basic Steps in the Registration Process – Electronic Version

Once the decision has been made to accept an object into the museum collection, these are the basic steps to follow:

1. Accession the object(s) – Assign the next sequential accession number and create an activity record in the TMS database. This record will include the source name and address. Optional: some field units also maintain a traditional accession book and continue to record all accessions there in addition to creating the TMS activity records.
2. Prepare and file an accession folder labeled with the new accession number. Place all official documents, correspondence, photographs, and other related information into this folder.
3. Assign individual catalog numbers to the objects in the accession. Reserve the numbers in TMS.
4. Place a catalog number on each object.

5. Catalog the object(s) by creating object record(s) in the TMS database. Ideally, this record will include a description of the object, current location, dimensions, significance, history, condition, value, and use of the object. At a minimum, the record should include a description of the object, its current location, and dimensions.
6. Photograph the object.

After the registration process is completed, museum objects can be located by using virtually any information about the object — source, catalog number, acquisition date, etc.

Numbering Documents

Evolution of Numbers

Relatively few changes have been made to DPR's numbering systems over the years. In December 1996, however, changes were made in the Department's numbering system that marked a significant departure from the way that activity records and some object records had been numbered in the past. New numbering systems were established to ensure that activities were numbered consecutively, to distinguish one activity from another (e.g., incoming loans from outgoing loans), and to accommodate electronic record keeping. All instructions for numbering records and objects in this manual will reflect the numbering system adopted in 1996.

Registration Location Number

Each registration system has a Registration Location Number that serves as a prefix to all numbers assigned within that registration system. The following are examples of the three-digit numbers:

- 139 Bidwell Mansion State Historic Park
- 455 Monterey State Historic Park
- 794 Fabled Farm State Historic Park

Early on, Registration Location Numbers were commonly called "unit numbers" because park unit numbers also served as museum numbers. As a result of departmental reorganizations, in many parks these numbers no longer match. To avoid confusion, refer to this prefix as the Registration Location Number.

Registration location numbers are issued from Museum Services Section, Cultural Resources Division on a statewide basis. If you are starting a registration system for museum collections, you should contact Museum Services Section for number assignment and initial guidance.

Accession Numbers

In December 1996 California State Parks adopted a new numbering system. Prior to that date, most accessions from the same source were given the same accession number. All purchases, transfers, and objects found on site shared the same accession number of "1."

Under the new numbering system, all types of acquisitions — gifts, purchases, transfers from other state agencies and objects found on site — are assigned the next consecutive accession number in the park's registration system.

All objects acquired from one source at one time are part of the same accession. Subsequent acquisitions from the same source are given different accession numbers. Multiple gifts from one donor are related through the park's Source file. (For more information on Source Cards, see this chapter, pages 5.40–5.43.)

The accession number has two parts: 1) the registration location number, and 2) the next consecutive number in the sequence. For example, consecutive accessions for a park with the registration location number of "794" might be as follows:

794-9
794-10
794-11

New accession records are filed consecutively with other accession records.

Numbering Activities Other Than Accessions

Activities other than accessions include incoming loans, outgoing loans, park-to-park transfers, authorizations for extended hands-on use, and in some cases, receipts of objects – incoming and releases of objects – outgoing.

Activities draw from the same sequence of numbers regardless of type and are filed sequentially. There are two exceptions. If a receipt of objects – incoming or a release of objects – outgoing is related to a loan or accession, it is preferable to assign these activities the number of the accession or loan with which they are associated.

Activity numbers have three parts:

Registration Location Number – Activity Code – Activity Number.

The activity code inserted between the registration location number and the consecutive activity number differentiates these numbers from the accession numbers.

The activity codes are derived from the initial letters of the title of the activity:

D	Deaccession
IL	Incoming loan
IT	Incoming park to park transfer
IR	Incoming receipt of object
HO	Authorization for extended hands-on use
OL	Outgoing loan
OT	Outgoing park to park transfer
OR	Outgoing release of object

Activities of different types for the fictitious park, Fabled Farm SHP, might fall into a sequence like this:

794-IL-65
794-IR-66
794-OT-67
794-IR-68
794-OL-69
794-D-70

Prior to the adoption of a new numbering system in December 1996, activities other than accessions had no statewide numbering system, and incoming loans were treated as accessions.

Catalog Numbers (Object Numbers)

Every DPR museum object should have a unique catalog number to associate it with its documentation and differentiate it from similar objects. DPR catalog numbers have three parts (e.g., 794-74-3). Although the first two parts of a number are shared with other objects from the same accession, the third part of the number makes the catalog number unique. There are three kinds of catalog numbers.

Catalog Numbers for Objects from a Documented Accession.

The catalog numbers for all objects in the same accession start with the same two-part accession number. The third part of the catalog number is assigned to each object in sequence. For example, if you have an accession containing four objects with the accession number "794-101," the catalog numbers would be as follows:

794-101-1
794-101-2
794-101-3
794-101-4

Catalog Numbers for Objects Whose Source Is Unknown.

When you find objects in your collection without a number and without any apparent documentation, you should assign them an "X" number to track them until they can be associated to an accession or otherwise identified. All catalog numbers for unidentified objects start with the same two parts: the registration location number, followed by an "X." The third part of the catalog number is assigned to each object in sequence. For example, the first two unidentified objects found and numbered at a park with the registration location of "794" would be as follows:

794-X-1
794-X-2

The next three unidentified objects found at the same location would continue the sequence:

794-X-3
794-X-4
794-X-5

When an "X" object is associated with an accession or other object number, those numbers should be noted on the *DPR 444B, Catalog Card* and in the accession file. Recataloging the object is not necessary, but if the item is recataloged, the old "X" number should be noted and the *Catalog Cards* should be cross-referenced. Do not, however, remove any old numbers from the objects themselves. If you are cataloging electronically (TMS), change the accession number on the TMS record.

“Z” Numbers for Tracking Objects

There may be times when you need a method to track objects, program aids, or objects on loan to the Department that are not part of your park’s museum collection. In these situations, it is possible to use “tracking numbers” rather than “catalog numbers,” since these objects are not part of the Department’s catalog of owned objects.

Tracking numbers for interpretive program aids. You may track inexpensive, consumable items used as interpretive program aids or exhibit props through the registration system, by assigning “Z” numbers to them. The advantage to tracking is knowing where you obtained the items and how long they last, and if any of them are missing. Typical examples of interpretive program aids are an inexpensive tin cup used in a living history program, replica curtains used in a house museum, prints hung in a hotel lobby, a ceramic basin set on a bedroom bureau, a color Xerox of an historic document placed on a desk, or a natural history specimen collected for use in interpretive programs.

“Z” numbers have three parts:

Registration Location Number – “Z” –
Next sequential number assigned to Z objects

The first two items purchased for a park with the registration location of “794” would be numbered as follows:

794-Z-1
794-Z-2

The next three consumable objects acquired for the same park would continue the sequence:

794-Z-3
794-Z-4
794-Z-5

It is important that “Z” numbers are marked clearly, so that the objects are not found later and cataloged with an “X” number by mistake.

“Z” objects do not require deaccessioning when they are lost, broken or worn out, as they never were accessioned into the Department’s collections.

It is up to the curatorial staff at each park unit to choose the best means to record and follow “Z” numbers. One means is to use a number log. (See sample Number Logs this chapter, pages 5.32–5.37. Another means is to record “Z” objects on *DPR 444 B Catalog Cards*. Whatever method is used, it is important to note the disposition of the object when it is no longer in use.

Tracking numbers for objects owned by others on loan to DPR. Keeping track of objects on loan to your park unit is essential. It is up to the curatorial staff to select the best means to account for objects in the park’s custody. One method is to use a number log. (See also “Tracking Incoming Loans,” Chapter 6, pages 6.21–6.23.) Another method is to use a log book. The use of temporary catalog cards is a third.

There are also alternative methods of numbering for the purposes of tracking objects in the same incoming loan. One method is to start with the loan’s three-part activity number. Then the last part of the tracking number is assigned in sequence. For example, the first two objects in a loan with an activity number of 794-IL-42 would be tracked with the following numbers:

794-IL-42-1

794-IL-42-2

Alternatively, the owner’s catalog number may be used for the last part of the DPR number. For example, objects in a loan with an activity number of 794-IL-42 that have been identified by their owner as G5.35 and J6.79 could be tracked with the following numbers:

794-IL-42-G5.35

794-IL-42-J6.79

Some objects in DPR’s custody have been on “permanent loan” to the Department under agreements that are decades old. Many of these objects already have DPR catalog numbers assigned and affixed to them. It is not necessary to remove the numbers or change the records to bring them in to conformance with current practice for incoming loans.

Tracking numbers should not be marked on loaned objects. Temporary tags are an acceptable alternative.

Use of the Number “1” in Cataloging

In December 1996 California State Parks adopted a new numbering system. Prior to that date, purchases, transfers, and objects found on-site shared the same accession number of “1” (i.e., 794-1). Consequently, there are many objects in DPR collections with “1” as the middle part of the catalog number.

In the new system, all accessions are treated alike. Purchases, objects found on-site, and objects transferred from other state agencies are assigned the next available accession number. For example, a saddle purchased for Fabled Farm SHP is assigned the next accession number: 794-107. Since the saddle is the only object in that accession, it is given the catalog number 794-107-1.

The only time you would need to use a catalog number like “794-1-23” is if the object was part of your park’s first accession.

Renumbering Objects

It is common to find documents in the files and objects in storage that have been assigned numbers that are different in format from the current numbering system. These “old” numbers may relate to an early registration system used in State Parks or to a numbering system used by the donor or previous collector. In most cases, old numbers should not be removed from objects and objects should not be renumbered. One exception is when more than one object has the same old number. In such cases, the typical practice in State parks has been to add “.D” to the end of one of the numbers. If there are several objects assigned the same number, then a sequence such as “.D,” “.D2,” “.D3,” “.D4” may be used. If it is necessary to renumber an object, be sure to cross-reference records so that relationships are not lost.

For assistance in interpreting old numbers, contact Museum Services Section. For assistance in safely removing or changing old numbers, contact the Service Center Curator.

The Accession Book

The Purpose of an Accession Book

An accession is the acquisition of one or more objects at one time from one source. An Accession Book gets its name from the fact that accessions are the most frequent events recorded in it. It actually includes all activities that take place within a museum collection, including loans, transfers, and deaccessions. Occurrences such as thefts, fire, insect damage, or breakage are also noted in the Accession Book. As a record of the chronological history of a museum collection, it is central to all registration activities at a park.

An Accession Book may be used to record the transactions for an entire park or a single facility that houses museum objects. Entries should be made only by the unit's collections manager, curator, or other authorized person familiar with the Department's registration procedures.

Conversion to an Electronic Accession Record

The Accession Book can be retired when the park converts to electronic registration. A chronological history of collection activities will then be available through a computer report. The retired Accession Book should be retained in the museum's collection records as one of its most important elements. Some State Park units have chosen to use both electronic registration and an Accession Book.

Accession Book Format: General Considerations

1. The Accession Book should be in a permanent format. A bound volume is preferable, as the pages in a loose-leaf book can be lost too easily.
2. A journal or record book with consecutively numbered, lined pages can be purchased from a stationery or business supply dealer. It is best to opt for a journal printed on acid-free paper, if available.
3. All entries should be in black or blue permanent ink.

Entering Information in the Accession Book

To enter information in an Accession Book, follow the steps described below (see Figure 17). The numbers on the sample pages correspond with the numbers of the instructions listed here.

The **first page** is reserved for a listing of each person who has ever made an entry into the Accession Book. This listing makes it possible to readily identify individuals who have recorded information in the book, even at a much later time. The following information should be entered, printed rather than written, on the first page:

1. Name (first, middle initial, last).
2. Initials (as they will appear in all museum documents).
3. Job title (e.g., Museum Technician).
4. Date that he/she began work at the park and ending date when the staff member leaves.

The **remaining pages** are divided into columns in which the following information should be recorded as legibly as possible:

1. Column 1 – Transaction Date: Enter the date on the activity document (i.e., the actual date of an event, or the discovery date of an occurrence.)
2. Column 2 – Activity Number: Enter the activity number (loan, transfer, etc.) Note: Accessions are the most common types of activities.
3. Column 3 – Object Number: Enter the object (catalog) number when it has been cataloged.
4. Column 4 – Activity Type: Record the kind of activity or occurrence (e.g., gift, damage).
5. Column 5 – Source: Record the name, address, and phone number of the donors, vendors, or other institutions.
6. Column 6 – Description: Enter a short description of the objects or the occurrence.
7. Column 7 – Initials and Date: Enter the initials of the person recording the information.

**SAMPLE PAGES FROM
AN ACCESSION BOOK**

(FIGURE 17)

36 7.	2.	3.	4.	5.
Transaction Date	Activity Number	Object Number	Activity Type	Source
10/1/98	794-52-	1	gift	August E. Berry 9248 S. Feliz St. Fresno, Ca 98654 (559)652-4987
		2		
		3		
		4		
		5		
		6		
10/14/98	794-53-	1	gift	Mary R. Kelly 283 Gibson St. Woodland, Ca 95619 (530) 472-5224
10-18-98	02-230		Release of Obj. Outgoing	
10/19/98	794-54-	1	FOUND ON SITE	
4/25/96	794-31-	1	FOUND ON SITE	
		2		
		3		

6.		37
Description/Remarks		7. Initials/ Date
794-52-1	Anvil, mfg 1862 Brighton & Waite, Boston	CCK 10/5/98
794-52-2	Bellows, hand-held 18 1/2" x 11" Copper, wood, leather	
794-52-3	Tongs, scissor type handle, riveted joints	
794-52-4	Flatiron wrought by blacksmith 9 1/2" x 3" x 6 1/2"	
794-52-5	Iron trivet, 3 legs wrought by blacksmith.	
794-52-6	Shears, 10" x 4 1/2", wrought by blacksmith.	
All items in this gift are from Mr. Berry's antique agricultural equipment business in Fresno, "The Farm Barn."		
794-53-1	Baby's shirt made of French cambric trimmed with Valenciennes lace around neck + sleeves	CCK 10/18/98
794-53-2	Little girl's apron, muslim trimmed w/ blue ribbon around neck. Items belonged to Mary Kelly's great grandmother, Ida Ford.	
Two oil paintings released to Beacon Art Transit for conservation by Fine Arts Restoration in S.F. Paintings are: "Laboring in the Fields" 794-14-1 and "River Frolic" 794-39-2		PS 10/18/98
794-54-1	STEREOSCOPE FOUND IN TABLE LOCATED IN GARCIA RANCH HOUSE LIVING ROOM	HN 10/19/98
794-31-1	PESTLE, LIGHT GREY, VOLCANIC ROCK	HN 10/19/98
794-31-2	MORTAR, STONE, PORTABLE, LIGHT GREY VOLCANIC ROCK	
794-31-3	PESTLE, BROWNISH-WHITE, GRANITE, BROKEN AT ONE END	
OBJECTS FOUND BY RANGER ROSS NODDINGTON NEAR SOUTH-WEST CORNER OF OLIVE ORCHARD. STORED IN BARN UNTIL NOW.		

38.				
1.	2.	3.	4.	5.
Transaction Date	Activity NUMBER	Object Number	Activity Type	Source
10/21/98	794-55 -	1	gift	Wally Douglas Rt 6, Box 929 Coalinga, CA 93721 (559) 764-3294
11/4/98	HO-231		hands on Authorization	Superintendent Strong
11/8/98	IT-232		incoming transfer	Shasta SHP
12/2/98	794-56 -	1	gift	Simone Buchard (213) 449-6891
12-13-98	PL-233		outgoing loan	to: Heartland Historical Society 5969 Peach Blossom Tuleville, Ca 95861
1/15/99	794-57 -	1 through 3,197	gift	Dr. Bradley Disprose 1767 May street Reno, Nevada (702) 449-7669

6.		7.
Description / Remarks		Initials/ Date
794-55-1 leather horse hobbles connected by 22" chain		CCK-10/29/98
findlay oval cooking stove 794-39-14 - To be used by volunteers for making cookies during annual "Holidays on the Farm" weekends 11/1-12/30		RSV 11/4/98
126-15-2 lithograph of a Central Valley Farm		CCK 11/10/98
126-15-3 lithograph of pear orchard at harvest time		
126-15-4 lithograph of farmer + team harrowing a field		
All prints are by J.J. Farnsworth		
794-56-1 Cast iron farm bell - ringer missing		CCK 12/4/98
woman's gown	794-30-1	RS 12-13-98
hat, straw	794-30-5	
fur cuffs	794-30-6	
white cotton shirt	794-62-6	
white bonnet	794-2-1	
mens shoes, black	794-X-20	
all of the above objects will be displayed in a special clothing exhibit of the 1800's-1860's		
Dr. Disprosper, a renowned heart surgeon, was a rare book collector. He willed all books, sheet music, photographs, works of art and ephemera, ^{in his collection} relating to California history, horticulture, farm equipment, horse-drawn vehicles and other topics. See list of objects in accession folder for details.		CCK 2/28/99

Setting Up the Filing System

General Principles

When setting up a filing system for your park's registration records, keep in mind these basic principles:

Simplicity

Design the system so that it is simple enough to be understood by anyone who will need to use it. It is easier to keep a file system up-to-date if it is not overly cumbersome.

Clarity and Consistency

Clearly label file cabinets and file folders using uniform formatting. Be consistent in spellings and the wording of titles.

Retrievability

Organize files and documents in the way in which most users will logically search for them. Arrange files alphabetically, numerically, or chronologically, depending on the type of information and how it will be used.

Currency

Update and file new materials in a timely manner.

Security

Protecting a unit's objects and specimens extends to the documentation connected with them. (See also Protecting Registration Files, this chapter, page 5.2.)

Basic files for managing State Parks' museum collections include the following:

- Accession Files (Sometimes called Donor Files)
- Activity Files (for activities other than accessions: loans, transfers, release and receipt of objects, authorizations for extended hands-on use.)
- Number Logs
- Deaccession Files
- Object (Catalog) Files
- Catalog Card Files
- Source Cards
- Park Location Chart

Accession Files

Accessions include all acquisitions into a park's collections, namely gifts, purchases, transfers from other state agencies, and objects found on-site. An Accession Folder should be created at the time the accession is proposed.

The folder label should contain (see Figure 18):

1. The two-part accession number (This number is assigned after the accession is approved.)
2. The name of the source (donor).

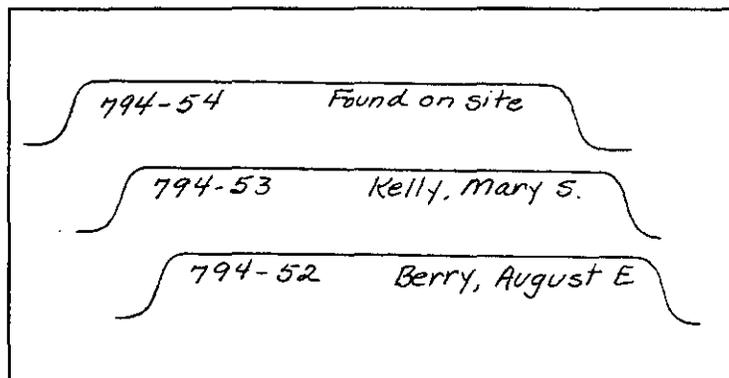


Figure 18 — Sample File Folder Labels

Place the following information and material in the accession folder:

1. A suspense copy of the *DPR 925, Deed of Gift* while the gift is under consideration.
2. Correspondence relating to the accession.
3. *DPR 927, Receipt of Objects – Incoming*, if one or more objects are left in the custody of the Department for evaluation.
4. Other documents pertaining to the acquisition, such as receipts, bills, invoices, transcripts of wills, bills of lading, or appraisals.
5. Research relating to the accession, including bibliographies, newspaper clippings, field notes, working notes, restoration reports, photographs and negatives.
6. Photographs and negatives for identification purposes.
7. Condition reports, conservation proposals, treatment reports. When reports are too large to fit in the folder, file together in a separate location, and note in the accession file their titles, dates, and location.
8. *DPR 929, Release of Objects – Outgoing*, if the accession is declined, and the object left for evaluation is returned to the potential donor.
9. If the gift is accepted, a final copy of the *DPR 925, Deed of Gift* with original signatures.

File accession files sequentially by number. If you need to look up an accession and only know the name of the source, you can check the source cards and Accession Book to determine the accession numbers for donations given by specific donors.

Activity Files

What Are Activity Files? Activity files contain documentation for activities other than accessions, namely incoming loans, outgoing loans, park-to-park transfers, authorizations for extended hands-on use, deaccessions, and in some cases, receipts of objects – incoming and releases of objects – outgoing.

Numbering. Activities draw from the same sequence of numbers regardless of type and are filed sequentially with the exception of accessions and receipts and releases of objects associated with other activities. Activity numbers have three parts: Registration Location Number – Activity Code – Activity Number.

Example: 308 – OL – 4

Filing. Two methods of filing activity documents are commonly used in State Parks.

Method One: All activity documents are filed together in a folder or folders as needed. The sequence of documents might look like this:

794 – IL – 1 (incoming loan)
794 – IT – 2 (incoming park to park transfer)
794 – IR – 3 (incoming receipt of object)
794 – HO – 4 (authorization for extended hands-on use)
794 – OL – 5 (outgoing loan)
794 – OT – 6 (outgoing park to park transfer)
794 – OR – 7 (outgoing release of object)

Method Two: Some or all activities are filed by activity type. Curatorial staff may choose this system if their unit has many activities in the same category. For instance, staff may want to file all loans together or all authorizations for hands-on use together. The sequence of numbers for a file devoted exclusively to outgoing loans might appear like this:

794 – OL – 5
794 – OL – 11
794 – OL – 15
794 – OL – 46

Notice the gaps in the numbers. The breaks in sequence are there because other activity documents in the numbering sequence are filed in other places.

DPR 927, Receipts of Objects – Incoming and DPR 929, Releases of Objects – Outgoing are treated somewhat differently in terms of numbering and filing. If these forms are connected with a gift or loan, they are assigned the accession or loan number with which they are associated and filed with the documents for that gift or loan. If the receipt or release of object is not connected with another activity, namely a gift or a loan, it is assigned the next consecutive activity number and filed sequentially with other activities.

Number Logs

A Number Log can provide a quick way to determine the next consecutive activity number without having to search through an Accession Book. Two types of logs are needed: one for accessions and one for other kinds of activities. To ensure their usefulness, numbers should be entered into the logs as soon as they are used. Three samples follow. (See Figures 19, 20, and 21.)

**ACCESSION NUMBER LOG
ACTIVITY NUMBER LOG
“Z” NUMBER LOG**

(FIGURES 19, 20 & 21)

Page: 1**ACCESSION NUMBER LOG**Unit Name: Fabled Farm state Historic ParkRegistration Location Number: 794

Accession Number	Source Name	Date	Initials
794-1	Alphonse LaRue	4-25-95	CCK
794-2	John and Jane Bay	5-1-95	CCK
794-3	Ashley Flagg	5-1-95	CCK
794-4	Bernardo & Belinda Perez	5-10-95	CCK
794-5	Ignacio Ortega	5-20-95	CCK
794-6	Fabled Farm Coop Assn.	5-22-95	CCK
794-7	John and Jane Bay	6-30-95	CCK
794-8	Fred Tsang	8-20-95	PS
794-9	Wally and Joyce Douglas	8-21-95	PS
794-10	Fabled Farm Coop. Assn	8-23-95	RSV
794-11	Simone R. Buchard	12-24-95	CCK
794-12	purchase from Grayson Fox's Antique Boutique	3-17-96	CCK
794-13	Fabled Farm Coop. Assn.	4-21-96	CCK
794-14	FOUND ON SITE	4-29-96	HN
794-15	FOUND ON SITE	4-29-96	HN

Figure 19 — Sample Accession Number Log

ACTIVITY NUMBER LOG

Unit Name: Fabled Farm state Historic Park

Registration Location Number: 794

Activity Number	Description	Date	Initials
794-OT-44	Outgoing Transfer	11-6-98	CCK
794-OL-45	Outgoing Loan	11-6-98	CCK
794-OL-46	Outgoing Loan	1-3-99	CCK
794-IT-47	Incoming Transfer	1-27-99	RS
794-IR-48	INCOMING RECEIPT OF OBJECTS	2-8-99	HN
794-HO-49	HANDS ON AUTHORIZATION	2-9-99	HN
794-HO-50	HANDS ON AUTHORIZATION	2-9-99	HN
794-OR-51	Outgoing Release of Objects	3/18/99	CCK
794-IR-52	incoming receipt of objects	3/22/99	CS
794-IR-53	incoming receipt of objects	3/29/99	CS
794-IL-54	Incoming Loan	4/16/99	CCK
794-IL-55	Incoming Loan	4/17/99	CCK

Figure 20 — Sample Activity Number Log

Page: 1**"Z" NUMBER LOG**Unit Name: Fabled Farm SHPRegistration Location Number: 794

"Z" Number	Object Name	Source	Date Acquired/ Date Discarded	Initials
794-Z-1	Color xerox Calif. Pioneers Membership Cert.	Kinko's 1621 Millrace st. Fresno, Ca	7/3/98 9/7/99 (stolen)	CS PS
794-Z-2 to 794Z-5	4 Tin cups	Midvale Hardware 792 Main st. Midvale, Ca	7/21/98	CCK
794-Z-6	xerox invoice from Thomas seed Co 7/21/1995	Kinko's 1621 Millrace st. Fresno, Ca	8/4/98	CS
794-Z-7	xerox Marriage certifi- cate Harry & Dolores Sunnen	"	8/4/98	CS
794-Z-8	xerox Birth certificate John A. Sunnen	"	8/4/98	CS
794-Z-9	xerox Death Certificate Dolores Sunnen	"	8/4/98	CS
794-Z-10 794-Z-11	2 white candles	Raley's 4675 Smith Ave. Hearthland, Ca	9/2/98 1/10/00 (became discolored)	CCK HN
794-Z-12 to 794-Z-18	8 Gingham curtains	Beverly's Fabrics 5273 Smith Ave Hearthland, Ca	9/2/98	CS

Figure 21 — Sample "Z" Number Log

Deaccession Files

More than any other area of collection management, the deaccession process is likely to be the subject of controversy. This circumstance makes thorough record keeping essential.

Records of all deaccessions are kept in two locations: the park unit where the deaccession originates and at headquarters where documentation from the Deaccession Review Committee process is generated. Consequently, you will need to make two copies of all documents: one copy for the park unit's files and one copy for Statewide Museum Collections Records located in the Museum Services Section.

Documentation should include the following materials:

1. The correspondence from the District Superintendent to the Deputy Director for Park Operations proposing objects for deaccession.
2. Any supporting information (e.g., correspondence describing the original intent, appraisal, etc).
3. A copy of the catalog record.
4. A photograph of the object, as appropriate.
5. The justification for requesting deaccession. This may be recorded on a "Deaccession Proposal Worksheet."
6. Recommendations, if any, for disposal.
7. A copy of the Deaccession Checklist, if one is prepared.
8. A copy of the approval (memo) for deaccession signed by the Deputy Director for Park Operations.

Once the deaccession has been approved the following related records must be annotated accordingly at the park and at headquarters:

- Accession file
- Title document (i.e., deed, will, etc.)
- Object file
- Catalog card
- Electronic (TMS) record

Since headquarters staff is responsible for coordinating deaccessions, each deaccession is assigned the next activity number in Museum Services Section's registration system. For example:

091-D-52

It is recommended that you file all deaccessions for your park unit together labeled with the date and deaccession number.

For a complete discussion of the deaccession process see Chapter 6 Deaccessions, pages 6.75–6.84.

Object Folders (also called catalog folders)

An accession may consist of one, a few, or even hundreds of objects. Some objects, because of their historical or interpretive significance, may merit their own object folder. An object folder should be labeled with the object's catalog number and object name. Example:

794-15-10 Mantle clock.

Remember that information relating to the accession as a whole remains in the accession folder. Information that pertains only to the object goes in the object folder. Such information may include the following:

1. Correspondence specifically related to the object.
2. Research material relating to the object, including oral histories, newspaper clippings, field notes, working notes, restoration reports.
3. Photographs and negatives taken for identification purposes.

If your park unit is using TMS, make an entry in the artifact's object record to record the existence and location of the photograph.

4. Condition reports, conservation proposals, treatment report. (You may need to place a notation in the file if the report must be filed elsewhere due to its size.)
5. *DPR 444A, Catalog Card Worksheet* after the *DPR 444B Catalog Card* has been typed.

If you have a series of related objects — a set of china, bowling pins, a carpenter's tool case — it is often more practical to create one object folder for the series of objects than to create folders for each of them.

File object folders sequentially by catalog number behind the accession folder.

Catalog Cards

Before filling out a Catalog Card, use a *DPR 444A Catalog Card Worksheet* to gather the information. Once the *DPR 444B, Catalog Card* is filled out, file and distribute copies as follows:

white copy – remains at the park as a permanent record of the accession. It is filed numerically with other white copies in the park's registration records.

pink copy – send to Statewide Museum Collections Records for filing.

buff copy – file numerically with other buff catalog cards. Many units have found these files most useful when the buffs are grouped alphabetically by subject (i.e., ethnographic, documentary, vehicle, etc.) The buff copy accompanies the object if it is transferred to other locations within the Department.

For more about Catalog Worksheets and Catalog Cards see Chapter 7 Cataloging.

Source Cards – Manual Version

Source cards, also called constituent or donor cards, contain information on individuals, organizations, or institutions that donate objects to your park unit. Most parks use 3"x 5" or 5" x 8" cards, but you should use a card size that will best meet your unit's needs.

Basic information entered on a source card is as follows:

1. Source name. Type the last name, followed by the first name and middle initial of an individual or the name of an institution or organization on the top left side on an index card.
2. Address and phone number. Type the address and phone number below the source name.
3. Accession number(s). Type the accession number(s) on the top right side of the index card.
4. Acquisition information. List type of gift, acquisition number, date, and brief description of contents, including the number of objects in the gift.

Additional acquisitions from the same source should be recorded on the same index card. This method makes it possible to locate accession records (filed numerically) relating to a specific source when only the name of the source is known.

5. Multiple donors. Type cross-references at the bottom of the index card for multiple donors of one acquisition. A main donor name will carry the information about the gift with cross-reference cards for each additional name. If an agent for a donor is involved, a cross-reference card should be made for the agent.
6. Additional information regarding the donor should also be typed at the bottom of the card. For example, if the donor is related to a family of historic importance, it may be helpful to note the relationship on the card.

Source cards are filed alphabetically. (See Figure 22.)

SOURCE CARD

				3.√
1.	Buchard, Simone (Mrs.)			794 - 30
				54
2.	6985 Route 2, Box 703K			110
	Klamath Falls, Oregon 83209			
	541/488-4856 (home)			
4.	Gift: 794 - 30	August 7, 1999	1860s-70s clothing, 29 objects*	
	Gift: 794 - 54	December 24, 1999	Hats and jewelry, 8 objects*	
	Gift: 794 - 110	March 5, 2000	3 books by Mrs. Buchard	
5.	*This gift was given jointly by Mrs. Buchard and her sisters, Irene Bovary and Cecile Du Pont. See source cards under Bovary and Du Pont, respectively.			
6.	Simone Buchard is an émigré from France. She is also a published writer and historian. She has had a long-standing interest in Fabled Farm SHP for the French origins of the pioneers Jacques and Cherry LaRue. Among her publications is <i>Pioneer Duds</i> (1986, Windsong Press) and <i>The French in the California Gold Rush</i> (1977, UC Press)			

Figure 22

Source Files – Electronic Version

If your park unit is using TMS, there is no need to create a source file on cards. The names, addresses, and telephone numbers for a park's sources are recorded in TMS.

Park Location Chart – Manual Version

Function: The park location chart makes it possible to locate objects through the systematic numbering of exhibit and storage locations. Moreover, it allows curatorial staff to track the movement of objects in their unit. Often, rooms in buildings or museums have had more than one use or designation. A sewing room may have first been a bedroom and may be presently interpreted as a children's playroom. Seeing this room in the unit location chart with a letter/number assignment, reduces the chance for confusion.

Preparation: First, it is important to find out if a location chart is already in existence before starting to prepare a new one — to avoid confusion and initiating a second numbering system. When you begin preparing a new location chart, the level of detail needed depends upon the nature of the facility and type of storage. Some park units may require a location chart with several elements. These elements may include the following:

Site Plot. The site plot consists of an overall map of the unit showing the location and identifying each structure by name and/or area. Compass directions should be included.

Building Plot. Building plots are maps of each separate structure. These individual maps should identify each room and/or area with numbers and/or letters.

Room Plot. Within a given room, you may need to further identify storage or exhibit areas by assigning numbers/letters to each wall, closet, cabinet, rack, shelf, bin, bench, or drawer. For exhibit areas, numbers may be assigned to each case or shelf.

Key. The location chart key should give a clear explanation of the numbering/lettering system for each room if not readily apparent from the chart itself.

To insure their usefulness, all elements of the unit location chart should be easy to read and easy to update.

Revisions: Changes in the physical layout of storage facilities and exhibits will require a revision or replacement of the chart. The effective date should be clearly written on each chart. Care should be taken that the codes used do not duplicate old ones. Each time an object changes location, the appropriate code should be entered on the object record (buff copy of the *DPR 444B, Catalog Card*).

Distribution: Current working copies of the park location chart may be distributed or posted for the convenience of staff. A permanent copy should be kept with your park's museum registration records and outdated charts should be retained for future reference. Forward one copy of the park location chart to Statewide Museum Collections Records.

Sample: A sample location chart (room plot element) follows. (See Figure 23.)

Park Location Chart – Electronic Version

The park location chart is used as the basis for creating unique “room rack codes” to identify park locations in records. A room rack code is constructed with at least two parts: the registration location number followed by the building/room number or letter from the park location chart. Suffixes may be added to the room rack codes to further define exact locations within buildings or rooms.

Standardized Box System

Some parks prefer to use a standardized box system that identifies the location of the object by the box to which it is permanently assigned. This system allows for quick rearrangement of the boxes in crowded storage locations. As long as a listing of current locations for the boxes is maintained, it is unnecessary to update the individual object records each time a box is moved. The park location chart in this case is the listing of the boxes by their codes.

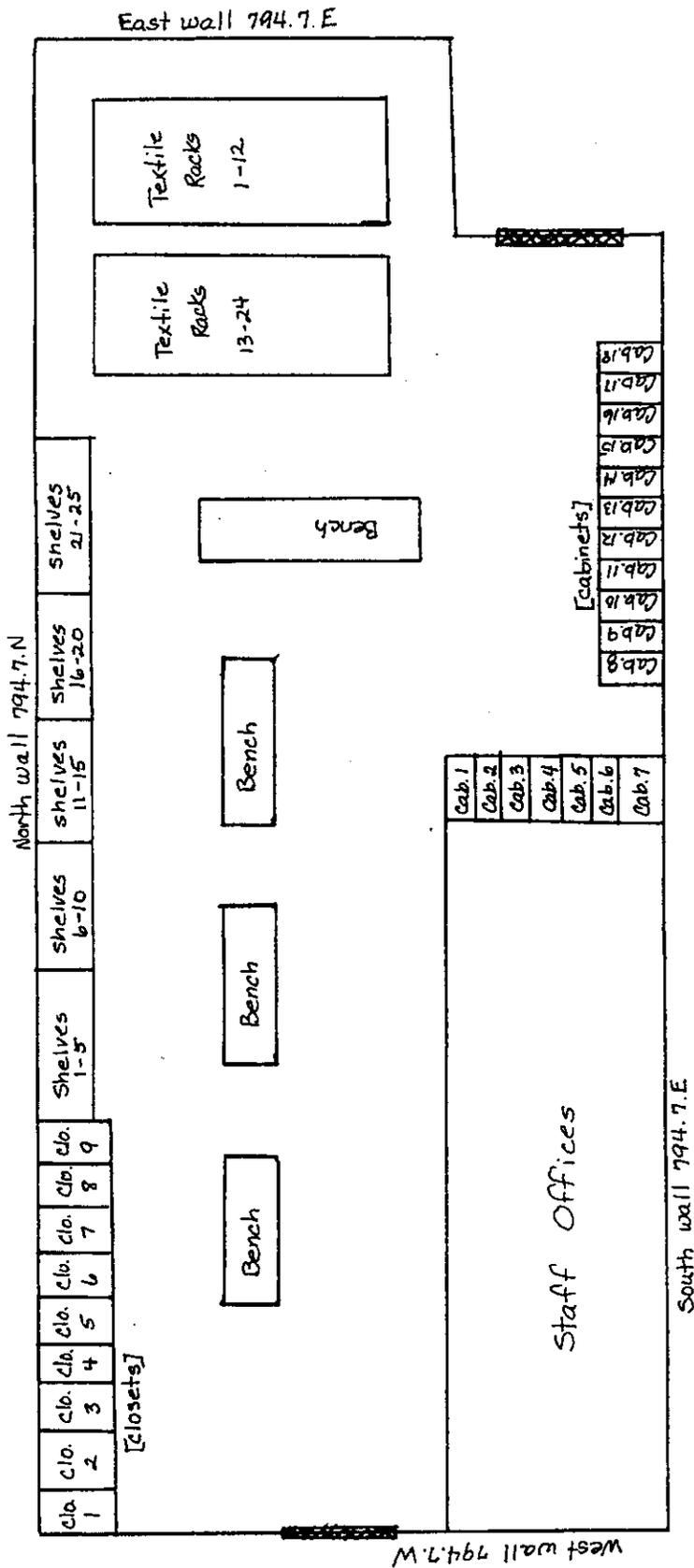


Figure 23 — Sample Park Location Chart Room Plot

Other Files Commonly Used for Managing State Park Museum Collections

The following types of files are also commonly used for managing State Park museum collections:

- Category/Subject/Classification Files (Research Files)
- Maker/Artist/Manufacturer Files
- Appraisal Files
- Conservation Files
- Exhibition Files
- Inventory Files
- Project Files

Category/Subject/Classification Files (Research Files)

Category/Subject/Classification Files provide a means to organize and easily access background information relating to your collections. Materials commonly found in these files are newspaper and magazine articles, bibliographies, selected chapters from books, brochures, etc., that will be of help to staff and volunteers in understanding and interpreting your unit's collection. Two suggested methods of organizing Category/Subject/Classification files follow here:

Method I: Subject files may be organized using a combination of the Department's traditional classification categories (see Classifications of Museum Collections, Chapter 3, pages 3.2–3.3) as well as topics pertinent to the unit. Example:

Archaeology

Architecture

Farm Buildings (1800s)

LaRue Mansion

Lighting Fixtures

Art

Artists of the Central Valley (1850-1900)

Documentary (Archives)

- Maps (List – Fabled Farm SP & Vicinity)
- Structural Drawings and Blue Prints (Finding Aid)
- Letters, Pioneer (Finding Aid)
- Journals, Pioneer (Finding Aid)

Ethnographic

- Basketry, Native American
- Shelters, Native American
- Tools, Native American
- Tribes of the Central Valley (General Information)

General Artifacts

- Blacksmith Trade and Tools
- Carpenter's Tools
- Chinaware
- Clothing (1850-1900)
- Cooking Utensils & Kitchen Appliances (1850-1900)
- Furniture (catalogs)

Natural History

- Birds of the Central Valley
- Endangered and Threatened Species of the Central Valley
- Fish
- Mammals of the Central Valley
- Geology of the Central Valley and the Sierra

State Park Memorabilia

- Oral histories – Fabled Farm SHP staff

Vehicles & Machinery

- Farm Machinery
- Wagons

Method II: Subject files may be composed of selected topics that reflect the park's purposes, interpretive themes, and activities.

Example:

- Birds of the Central Valley
- Blacksmithing Tools
- Children's Clothing (1850-1900)
- Children's Toys (1850-1900)
- Furniture (1850-1900)
- Farm machinery
- Geology of the Central Valley & the Sierra
- Men's Clothing (1850-1900)
- Native Americans, Tribes of the Central Valley

Weapons (Rules Governing Possession)
Weapons (Types)
Wildlife of the Central Valley
Women's Clothing (1850-1900)

Maker/Artist/ Manufacturer Files

The purpose of these files is to create a record on each maker, artist, or manufacturer who has significance for some aspect of your collection. The information placed in the files should be in alphabetical order by the last name of the maker or artist and full name of the manufacturer if it is a business.

Information for artists/makers might include:

- Life dates
- Dates spanning career
- Places worked
- Manufacturing sites
- Biographical notes
- Nationality
- Designation for group, tribal, or cultural affiliation
- Publications
- Awards

Information pertaining to manufacturers might include:

- Location(s)
- Principal products
- Name changes
- Date established and closed (if applicable)
- Names of principal owners
- Inventions
- Historical notes
- Awards
- Literature (brochures, advertisements)

Appraisal Files

Appraisal files contain formal appraisals and/or other documents, such as entries from auction catalogs or price guides, which could be used in determining the monetary value of an object. You may choose to place this information in your unit's object folders, depending on how staff in your unit is most likely to retrieve the information.

Conservation Files

Conservation files contain treatment proposals, treatment reports, and related photographic documentation such as "before and after" shots. You may choose to place this information in your unit's object folders depending on how staff is most likely to retrieve the information.

Exhibition Files

Exhibition files contain documents and notes from the planning stages of an interpretive exhibit to the opening. They should be filed in the most likely way staff will retrieve them (e.g., by exhibit title, by category, by date). Exhibition files may include the following documents:

- Exhibit plans
- Budget notes and estimates
- Correspondence with lenders, shippers, staff, etc.
- Inventories of the exhibit – by case, by catalog, by accession number
- List of lenders
- List of loan, receipt of object, and return of object documents
- Condition reports
- Photographs
- Related in-house notes and memos
- Shipping bids and bills of lading
- Conservation or exhibit maintenance schedules

Inventory Files

Inventories may cover the objects in an entire state park unit or be limited to selected buildings, rooms, cases, or categories of objects. Inventory file folders are typically labeled with the title of the inventory and the date of completion. Inventory files are typically kept in date order.

Project Files

Project folders are typically filed by date order with the date and title of the project on the file folder. The following are examples of typical projects for which documentation may be kept on file for future reference:

Visitor Center Plans and Construction
 Dewey Decimal Cataloging of Books at a Park Unit
 Rehabilitation of Carriage House
 Publication of Catalog of Historic Clothing at Park Unit

Use of Out Cards

Searching for a lost or misplaced file folder can be time consuming and frustrating. The use of out cards can help remedy this problem. A typical out card gives the checkout date, the name of the staff member taking the file, and the title of the file folder. Two types of sample out cards appear below. (See Figures 24 and 25.)

Out	
794-1-1921 to 794-1-3241	C. Kudrina 7/19/96 Rtd 8/2/96
794-56-1 to 794-169-2	Bobby McPhee 8/21/96 Rtd 9/2/96
794-30-1 thru 794-30-6	Kudrina 10-14/96 Rtd 10/14/96
794-201-4	Prem Singh 11/20/96 Rtd 11/24/96
Bushard, Simone	Prem Singh 11/24/96

Figure 24 – Sample out card 8" x 5" used to indicate who has removed catalog cards or source cards from a file and when.

Registration Checklist

You may find the following checklist helpful in registering objects in your park unit's collection:

Manual Registration

- Accession the object(s) by assigning the next sequential accession number and recording it in the Accession Book along with a brief description of the object.
- Prepare and file an accession folder labeled with the new accession number. Place all official documents, correspondence, photographs, and other related information into this folder.
- Prepare a source card and file it alphabetically by the last name of the individual or company who donated the object(s).
- Assign individual catalog numbers to the objects in the accession.
- Prepare a *DPR 444A, Catalog Worksheet*. Measure, describe, and record the primary information about the object(s).
- Place a catalog number on each object(s).
- Photograph the object(s).
- Prepare a *DPR 444B, Catalog Card*. File and distribute copies. (See also Chapter 7, pages 7.14–7.22.)
- Add the object(s) to an exhibit or place in storage.

Electronic Registration

- Accession the object by assigning the next sequential accession number and creating an accession record in the TMS database. This record will include the source name and address. Optional: Some field units also maintain a traditional accession book and continue to record all accessions there in addition to creating the TMS activity records.
- Prepare and file an accession folder labeled with the new accession number. Place all official documents, correspondence, photographs, and other related information into this folder.
- Assign individual catalog number(s) to the object(s) in the accession. Reserve the numbers in TMS, or use a handwritten Catalog Number Log.
- Place a catalog number on each object.
- Catalog the object(s) by creating object record(s) in the TMS database. Ideally, this record will include a description of the object, current location, dimensions, significance, history, condition, value and use of the object. At a minimum, the record should include a description of the object, its current location, and dimensions.
- Photograph the object.
- Add the object to an exhibit or place in storage.

COLLECTION ACTIVITIES

In a State Park unit, accessions usually account for the greatest volume of museum collections management activities. Accessions are at the center of the Collections Development chapter in this *Handbook*. This chapter describes all other activities.

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Introduction

What Is a Collection Activity?

A “collection activity” is similar to a business transaction in that an action takes place between two parties that reciprocally affects each participant. This chapter describes the procedures and documentation for the following museum collections activities:

- Incoming loans
- Outgoing loans
- Receipt of objects incoming
- Release of objects outgoing
- Park to park transfers
- Authorizations for extended hands-on use
- Deaccessions of objects

General Requirements for Activity Documents

Sources for Activity Forms

Collections management activity forms are available from three sources. Hard copies can be ordered from DPR's warehouse in Sacramento. Electronically, the forms are in the share folder on the Department's WAN. Most District Offices are connected to the WAN. The WAN versions of the forms will always reflect the latest revisions. And, if you do not have access to WAN, they may be requested on diskette from the Museum Services Section.

Completing Activity Forms

- Prepare forms in triplicate (one original and two copies, all with original signatures).
- Fill out the forms by hand, by typewriter, or by computer.
- Use black ink, if possible, and make notations and signatures in blue ink, so that the originals can be differentiated from photocopies.
- Assign a three-part activity number (See also Chapter 5 Registration, pages 5.12–5.13).
- Distribute completed forms as follows:
 - Park museum registration files
 - The other party to the activity
 - Statewide Museum Collections Records (SMCR)

Approvals

The following list describes those persons whose signature approval is required for particular activities. The list pertains to all types of activities—loans, releases and receipts of objects, park to park transfers, etc., as well as accessions, which are described in Chapter 3 Collection Development.

Owner/Lender: This person holds title to the object and has authority to transfer title or direct its use. The legal owner of an object may not always be obvious, and you may need to make additional inquiries to determine who that person is. When an object is owned by a married couple residing in a joint-property state, the signatures of both spouses may be required on the activity document.

Agent: Although an agent does not possess legal title to the object, he/she has authority to act on behalf of the legal owner. Examples of agents are a person with power of attorney for another, an executor for an estate, or an officer of an organization or institution.

Museum Curator: This is a DPR employee with a personnel classification of Museum Curator I, II, or III. An Archivist I or II, or Librarian may also sign as the curator for their specialized collections. The Curator's signature assures the Superintendent who must authorize the activity that the objects and circumstances have been reviewed by someone knowledgeable in museum collection matters. Parks that do not have a Museum Curator on staff should seek assistance from a curator at the Service Centers or at another park, or in the Museum Services Section.

Museum Collection Manager: At each park with museum collections, a Museum Collection Manager is designated by the Superintendent to provide general oversight for collection practices. While this individual frequently has a non-curatorial classification, he or she must be at the level of a Museum Curator I or higher and have a general knowledge of museum collections management. The Museum Collection Manager signs *Deed of Gift, Objects & Specimens Found On-Site*, and *Loan Agreement—Incoming* forms. The Collection Manager may also use the Collection Manager's Transmittal form to offer recommendations to the Superintendent on a variety of decisions and activities.

Superintendent: District Superintendents are responsible for the museum objects in their districts and must authorize most museum activities within their respective jurisdictions. District Superintendents may delegate authority for museum collection activities to Park Superintendents. At headquarters, the Division Chief assumes this role, unless signature authority has been delegated to the Section Manager.

Deputy Director for Park Operations: The signature of the Deputy Director for Park Operations, or his/her designee, is required in certain special circumstances, for instance: when a gift needs Department of Finance approval, when objects are deaccessioned, or when an outgoing loan will exceed two years.

Department of Finance: This signature is required only if a gift is valued at more than the amount specified by Department of Finance delegation to DPR.

Released by/Delivered by/Received by: Only persons authorized in writing by the Superintendent may receive and release museum objects into the custody of others. These persons may not always have curatorial classifications, but they will have been trained and can ensure that museum objects leaving a park unit are properly documented and handled. (See sample authorization letter, Chapter 1, page 1.13, Figure 3.)

If an “authorized” person can’t be present, he/she may delegate responsibility to another individual (for example, an Interpreter I on duty at the time of the delivery). The alternate should be instructed in the proper procedures for receiving and releasing objects. After the delivery, the authorized staff member should follow up to make sure the paperwork was filled out correctly and all went well.

The person who delivers the objects may be the owner, an agent acting on behalf of the owner, an employee of another institution or contractor, a professional courier, or another DPR employee.

Attachments

An attachment that is part of an agreement or form, (e.g., appraisals for loaned objects) should be stapled to the form. A notation should also be made on the face of the form identifying the attachment in case it is separated.

Special Terms

Special terms or conditions are written on DPR collections management forms in the space for listing objects. If you add special terms or conditions, or if you make modifications or deletions to the terms printed on the back of the form, proceed cautiously. Such changes may result in deviation from Department policy that would require approval of the Deputy Director for Park Operations. All signing parties must initial any additions, deletions, or modifications affecting the substance of an activity document.

Listing Objects

All objects involved in an activity must be identified individually on the activity form. Both the catalog number and object name should be listed whether it is an object owned by DPR or by another individual or museum (e.g., 794-45-6 Clock). Attach an itemized list to the form, if there is insufficient space on the form itself.

DPR 932, Collection Manager's Transmittal

Purpose

The *Collection Manager's Transmittal* is a means to convey advice and information to a District or Park Superintendent about a collection activity requiring the Superintendent's signature. It allows the Collection Manager to explain the reasoning behind his or her recommendations and to alert the Superintendent to the potential implications of approval or disapproval.

Procedures

Completion of a *Collection Manager's Transmittal DPR 932 Step-by-Step:*

A sample form follows (see Figure 26). Numbers have been placed on the form to correspond with the numbered instructions.

Filing: Although it is not mandatory to maintain copies of the *DPR 932 Collection Manager's Transmittal*, it is a good practice to keep all the paperwork together relating to a gift, outgoing loan, or other collection activity.

***DPR 932, COLLECTION MANAGER'S
TRANSMITTAL***

(FIGURE 26)

Instructions for Figure 26 – DPR 932, Collections Manager’s Transmittal

1. Enter the date.
2. Check the type of document on which the Superintendent’s signature is required and attach a copy of it, or check the box labeled “other” and describe the purpose of the transmittal.
3. Describe the action you would like the Superintendent to take.
4. List the reasons why the Superintendent should take the action you are recommending.
5. If known and applicable, provide an estimate of the value of the objects and the source of that information.
6. Explain any reservations you may have about this action.
7. Sign and type or print your name.
8. Enter a location, phone number, or e-mail address where you can be contacted.



CALIFORNIA STATE PARKS

Collection Manager's Transmittal

MUSEUM COLLECTIONS

State of California - The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

1. Date: 5/5/1999

Superintendent's Signature Required on Attached Documents:

- Deed of Gift Park-to-Park Transfer Authorization of Extended Hands-On Use
 Loan-Incoming Objects Found On-Site Other _____
 2. Loan-Outgoing Deaccession Nomination

Recommended Action:

3. I would like to request your approval to loan the objects listed on the attached agreement to Heartland Historical Society (HHS). The loaned items will be used in the Society's forthcoming exhibit "The Heartland's Pioneer Women," June 15 - October 15, 2000.

Argument in Support of Recommended Action:

4. We have loaned artifacts to the Heartland Historical Society for two other exhibits in the past with no loss or damage.

The staff at HHS, both salaried and volunteer, have a reputation for competence and professionalism in their dealings with other institutions. I have certainly found this to be true.

Additionally, in recent years, Heartland exhibits have enjoyed extensive press coverage and high attendance.

I am confident that our artifacts will be well cared for and that our participation in this exhibit will reflect favorably on our park.

Value of the Objects (if applicable):

Based On:

5. The estimated total value of the objects on the attached loan document is under \$10,000. The more important consideration is their intrinsic value to us in illustrating the history of the LaRue family and interpreting the period of history in which they lived.

Reservations:

6. No reservations.

SEE ATTACHMENT

Collection Manager's Signature

7. *Christina Kudrina*

Collection Manager's Name

Christina Kudrina

Contact Information:

8. Phone: 909/442-4507 am, 909/442-6591 pm. E-mail CKUDI.

DPR 932 (Rev. 4/99)(Excel 4/23/1999)

Figure 26 — Sample DPR 932, Collection Manager's Transmittal



Loan Agreement

794 - OL - 7
 Activity Number
 Number of Attachments 1
OUTGOING

Borrowing Institution Heartland Historical Society	
Authorized Agent and Title Lacey J. Ferns, Director	Phone/FAX 559/304-3994
Address 5969 Peach Blossom Lane	City - State - Zip Code Tuleville, CA 95867
Purpose of Loan Exhibit: The Heartland's Pioneer Women, June 15 - October 15, 2000	Period of Loan May 28-Oct. 31, 2000
Description of Objects (with catalog numbers):	Owner's Valuation:

- | | | |
|---------------|--|---------|
| 1. 794-52-6 | Woman's dress, linen, lavender and rose, ca 1860. | \$50.00 |
| 2. 794-52-17 | Dress, green and red plaid taffeta, ca 1872. | 50.00 |
| 3. 794-52-35 | Pair, red fingerless gloves. | 15.00 |
| 4. 794-101-1 | Pair, gold-rimmed spectacles. | 130.00 |
| 5. 794-52-357 | Book - - Raids and Romance of Morgan and His Men by Sally Rochester Ford, 1864. | 75.00 |
| 6. 794-204-1 | Four-page letter written in French from Madam Bowdler to her daughter Cherie (Cherry) LaRue. | 300.00 |

Additional condition of the loan:
 No objects are to be exhibited in more than five foot candles.

I have read and agree to the conditions listed on the reverse of this document and any attachments to it.

Agent's Signature <i>Lacey J. Ferns</i>	Agent's Name Lacey J. Ferns	Date 5/4/2000
--	--------------------------------	------------------

Approval by California Department of Parks and Recreation

Museum Curator's Signature <i>Christina Kudrina</i>	Museum Curator's Name Christina Kudrina	Date 5/4/2000
Superintendent's Signature <i>Clayton R. Strong</i>	Superintendent's Name Clayton R. Strong	Date 5/10/2000
Deputy Director of Park Stewardship's or Designee's Signature <input type="checkbox"/> Not Applicable	Deputy Director of Park Stewardship's or Designee's Name	Date

DPR 928 (Rev. 4/99) (Front) (Excel 4/23/1999) Distribution: Park Files Statewide Records Borrower

Incoming Loans

Criteria for Accepting a Loan

A loan obligates the Department to expend state resources to care for property it does not own. A loan also obliges the Department to assume liability for damage beyond normal age and wear. Before accepting a loan, consider the following criteria:

1. Will the loan result in significant benefit to the public and/or the State Park System?
2. Is there a written plan for use of the loaned objects? (e.g., interpretive, exhibit, furnishing or event plans, project descriptions, research designs.)
3. Given the nature and condition of the objects, can they be safely transported and used?
4. Can your unit maintain the objects according to professional standards of care?
5. Can your park meet the lender's specified conditions for use?
6. Can the unit bear any additional staffing and funding burden that this loan may create?
7. Has the lender agreed to DPR's conditions for the loan? General conditions for all loans to the Department are printed on the back of the *DPR 926, Loan Agreement—Incoming*. If additional conditions are negotiated, they must be specified on the front of the loan document or in an attachment.
8. What is the loan's specified duration? (See next section "Term of a Loan.")

Term of a Loan

An incoming loan should not exceed two years in duration. Any exception to this requirement – a loan negotiated for a period of time longer than two years — requires the written approval of the Deputy Director for Park Operations.

Loans from Cooperating Associations

When one of DPR's cooperating associations loans a museum object to the Department, the loan is subject to the same requirements as a loan from any other organization. A loan agreement must be in place before the objects can be displayed or stored on State Park property. (For further information regarding museum objects owned by Cooperating Associations, see Chapter 3, page 3.4.)

Abandoned Loans

When museum objects on loan are abandoned, a good faith effort must be made to notify the lender according to applicable state laws regarding the disposition of abandoned property. This effort must be documented with copies maintained permanently in the unit's records. (For additional information regarding abandoned loans, see Chapter 3, Resolution of Old or Abandoned Loans, pages 3.61–3.62.)

Lender Requirements

When an incoming loan agreement is negotiated, the lending institution may expect your unit to meet additional requirements. The following are typical requests:

1. **To Use the Lending Institution's Loan Form.** This request is acceptable if the terms of the loan are consistent with those on DPR's loan agreement form.
2. **To Complete a Facility Report.** The completion of a facility report is usually only requested when the object to be loaned is extremely rare or valuable, has great historical significance, or requires special care.

The report itself may consist of a customized format or the standard report form published by the American Association of Museums. The report should demonstrate the Park Unit's ability to protect the loaned objects, but it should avoid giving more security information than is necessary. For instance, it is not necessary to give a complete description of security for the entire park when only one small exhibit room is involved.

You should be aware that the Revised Standard Facility Report published by the American Association of Museums Registrars Committee is a copyrighted document. The report, ISBN 0-931201-55-1, includes a companion disk and may be ordered from the American Association of Museums, Technical Information Service, 1575 Eye Street, NW, Suite 400, Washington, DC 20005; phone: (202) 289-1818.

If you have questions relating to the circumstances that require the use of a Facility Report or the content of such a report, contact Museum Services Section.

3. **To Provide Evidence of Insurance.** DPR is self-insured, like most state agencies, for most risks. Special insurance can be purchased if needed. For information and procedures, contact the Office of Risk Management in the Department of General Services.

Completion of a *DPR 926, Loan Agreement* — *Incoming, Step-by-Step*

The *DPR 926, Loan Agreement — Incoming* is the form used to document the loan of objects to DPR from an institution or individual. It is negotiated in advance of receiving the loaned objects and requires the Superintendent's approval. It has a stated duration of up to two years.

Prepare the form in triplicate (one original and two copies, all with original signatures) and follow the steps in Figure 27.

***DPR 926, LOAN AGREEMENT —
INCOMING***

(FIGURE 27)

Instructions for Figure 27 – DPR 926, Loan Agreement — Incoming

1. Enter the name of the owner or institution lending the object.
2. Enter the name of the authorized agent and his/her name, title, phone number, and/or fax number.
3. Enter owner or lender's address.
4. List the purpose and term of the loan.
5. Describe each object and include catalog numbers.
6. List the valuation of each object. The valuation should be provided by the owner or lender.
7. Specify any additional conditions not listed on the back of the form.
8. Obtain the signature of the owner or authorized agent along with the date.
9. Obtain the signature of the collection manager and print or type his/her name along with the date.
10. Obtain the signature of the Superintendent and print or type the Superintendent's name along with the date.
11. If the term of the incoming loan exceeds the standard two-year limit, obtain the signature of the Deputy Director for Park Operations or his/her designee. Otherwise, check the box indicating that this signature is not applicable to this transaction.
12. Indicate the number of attachments. Information acquired during the negotiation of a loan becomes part of the loan agreement. Copies of the following types of documents should be attached to each signed agreement form:
 - a) A list of the objects loaned, if there are too many objects to fit on the front of the form.
 - b) A Facility Report if requested by the lender (See this section, pages 6.14–6.15 for additional information about facility reports.)
 - c) Evidence of insurance.
13. Assign the next consecutive activity number in the park's registration system.
14. Indicate who receives the copy.



CALIFORNIA STATE PARKS

MUSEUM COLLECTIONS

State of California - The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

Loan Agreement

13. 794 - IL - 6
Activity Number

12. Number of Attachments 0

INCOMING

Owner or Lender

1. National Museum of Dentistry (NMD)		
Authorized Agent Name and Title		Phone/FAX
2. Winston Chang, Museum Director		617/859-0444
Address		City - State - Zip
3. 243 Paul Revere Drive		Boston, MA 63021
Purpose of Loan		Period of Loan
4. Henry Goodman Exhibit 5/1/99-10/31/99		April 10-Nov. 30, 1999
Description of Objects (with catalog numbers if applicable):		Owner's Valuation:

6. One set of dentures (upper and lower plates) The foundation of the plates is made of platinum. Set was manufactured in New Orleans during the mid-1850s. Catalog Number: 1984.32.A and B 6. \$2500.00

7. Credit line: It is agreed that the following credit line will appear in the exhibit catalog as well as on a label in the exhibit case: On loan courtesy of the National Museum of Dentistry.

I am (we are) the lawful owner(s) of the above described objects and / or have legal authority to loan them to the California Department of Parks and Recreation. I (we) have read and agree to the conditions listed on the reverse of this document.

8. Winston Chang Date 3/5/1999

Approval by California Department of Parks and Recreation

9. Christina Kudrina Date 3/16/1999

10. Clayton R. Strong Date 3/20/1999

11. Deputy Director of Park Stewardship's or Designee's Signature Not Applicable Deputy Director of Park Stewardship's or Designee's Name Date

DPR 926 (Rev. 4/96) (Front) (Excal 4/21/1999) 14. Distribution: Park Files Statewide Records Lender

Figure 27 — DPR 926, Loan Agreement – Incoming

LOAN AGREEMENT -- INCOMING

Conditions Governing the Loan of Objects to the California Department of Parks and Recreation

Description of Objects

Attributions, dates, valuations, or other information about the objects listed in this agreement are those given by the owner/lender unless otherwise specified. The absence of notations regarding the condition of the objects does not mean that the objects were free of defects at the time of the loan.

Removal of Objects

The owner/lender agrees to remove the objects from the custody of the California Department of Parks and Recreation (hereinafter referred to as DPR) at the conclusion of this loan at no expense to DPR. Title to the objects listed in this agreement may become vested in DPR if the objects remain unclaimed for an extended period of time and the owner fails to follow prescribed procedures to preserve the owner's interest in the property. *See California Civil Code Section 1899 et seq.*

Standard of Care

DPR will safeguard the objects itemized in this agreement in the same manner as its own property of similar nature.

Alterations and Hazards

DPR will not alter, repair, conserve, or dispose of the objects listed in this agreement without the permission of the owner/lender, unless a) immediate action is required to protect the objects or other property under DPR's custody, or b) the objects have become a health or safety hazard. *See California Civil Code Section 1899.6.*

Research and Photography

DPR and its agents are authorized to photograph and/or examine by non-destructive means any object listed in this agreement. DPR and its agents may reproduce, distribute, modify, display, publish or otherwise use and reuse the resulting images and/or documentation in any medium for archival, educational, research, exhibition, and/or publicity purposes, but are not obligated to do so. Resulting images and/or documentation will not be made available for other purposes without prior authorization of the owner/lender.

Release from Liability

The owner/lender releases DPR, its employees, agents, and contractors from and waives any claims against them for liability or claims arising out of or related to any loss of or damage to the objects listed in this agreement.

Change of Address or Owner

The owner/lender will notify DPR promptly in writing of any change in address, or change in ownership of the objects listed in this agreement (whether by reason of death, sale, insolvency, gift or otherwise). The terms of this agreement shall be binding upon the heirs, executors, administrators, representatives, successors, agents and assigns of the owner/lender.

Other Loan Agreement Forms

In case of any difference between this agreement and the loan agreement forms of the owner/lender, which DPR may complete upon request, the conditions of this document will control.

Distribution of Copies

1. Mail or present one copy to the owner and/or lender.
2. File the park unit's copy under its activity number, along with any supporting information, in its own numbered folder.
3. Send one copy to Statewide Museum Collections Records.
4. Record the activity in the unit's Accession Book and electronic records (TMS).

Companion Forms

The *DPR 926, Loan Agreement—Incoming* documents the formal terms and conditions of a loan. The physical transfer of objects is documented with a *DPR 927, Receipt of Objects—Incoming* that is completed at the time your unit takes custody of the object. Instructions and samples are found in this chapter, pages 6.25–6.34.

Complete a *DPR 929, Release of Objects—Outgoing* to document the return of objects to the owner/agent. Instructions for filling out a DPR 929 and a sample can be found on pages 6.47–6.56 in this chapter.

The Collection Manager may choose to complete a *DPR 932, Collection Manager's Transmittal* to convey information about the loan to the Superintendent whose authorization is required on the loan document. (See this chapter, pages 6.7–6.12 for further information regarding Collection Manager's Transmittals.)

Tracking Incoming Loans

It is important to keep track of incoming loans, so that you know the location of the objects and the due date for returning them to the lender. There are many ways to do this. One method is a tickler file where the loan files are filed separately in order of their expiration dates. Another method is the use of a Number Log, an especially useful tracking tool when there are large numbers of loans or objects involved, or when objects have been borrowed from several institutions. (See Figure 28, A Number Log for Tracking Incoming Loans.)

NUMBER LOG FOR TRACKING INCOMING LOANS

(FIGURE 28)

**NUMBER LOG FOR
TRACKING INCOMING LOANS**

Unit Name: Fabled Farm SHP Registration Location Number: 794

Lender	Date Received	Loan Activity No.	Object Name	Object Number	Location	Date Returned
Heartland Historical Soc.	3/6/98	794-IL-4	photo b/w	794-IL-4-79-1	Visitor Center Gallery	6/14/98
			photo b/w	794-IL-4-79-16		
			photo b/w	794-IL-4-92-3		
Cowboy Bob Museum	3/8/98	794-IL-21	Rifle	794-IL-21-1	B11. Rm 2. Case 6	1/24/99
			Shotgun	794-IL-21-2	B11. Rm 2. Case 6	
Marshall Gold Dis. SHP	4/4/99	794-IT-30	Anvil	794-IT-30-1	B14. East Wall	3/16/00
Centerville Municipal Museum	6/19/99	794-IL-62	stereoscope	794-IL-62-65.35	B2. Rm 4. Case 2	Donated to Park on 3/30/00 See Deed of Gift 794-179
			stereoviews	794-IL-62-65.36-48	B2. Rm 4. Case 2	
Heartland Historical Society	12/1/99	794-IL-89	woman's dress	794-IL-89-1	B16. Rm 5 moved to B5. Rm 1. East Wall	

Figure 28

Renewal of a Loan

To extend a loan that is due to expire, you must complete a new *DPR 926, Loan Agreement—Incoming* form and obtain all required signatures. Reference the previous loan by number and term, and list any new attachments or conditions. For instance attach a new certificate of insurance if the old one has expired.

When assigning a number, keep the original loan number. It is not permissible to extend a loan by using the same loan document and writing “Renew” with a new date on it.

When Incoming Loans Become Gifts

When converting a loan to a gift, a *DPR 925, Deed of Gift* must be completed in order to transfer title to the Department. Assign an accession number to the gift and write a cross-reference to the loan on the *Deed of Gift*.

“Loan” of Objects Between State Parks (Transfers)

The temporary transfer of objects between State Parks is always recorded on a *DPR 930, Park to Park Transfer*. For instance, if Marshall Gold Discovery SHP provided Old Sacramento SHP with a number of farming implements for an exhibit, a *DPR 930* would be used to document the transaction. When the exhibit ends and the implements are returned, another *DPR 930* would be prepared to record the movement of the objects back to the park of origin. (See also Park to Park Transfers, this chapter, pages 6.57–6.66.)

DPR 927, Receipt of Objects—Incoming

When to Use a *DPR 927*

The *DPR 927, Receipt of Objects—Incoming* documents the physical transfer of objects from the custody of others to the Department of Parks and Recreation. Specifically, the *DPR 927* covers these three distinct sets of circumstances:

1. **The objects received are owned by others and a previously authorized agreement is in place.** A “previously authorized agreement” is typically a loan agreement or deed of gift. The agreement could also be a contract for services, such as a paid study of archaeological specimens for a university.
2. **The objects received are owned by others but there is no authorized agreement in place** (i.e., deed of gift, loan agreement, or contract for services). Such objects may be held in temporary custody by the Department for 30 days or less, otherwise a loan agreement is required. A park unit might accept custody of objects without an authorized agreement under the following circumstances:
 - When objects are left at the park unit to be examined by curatorial staff for possible acquisition.
 - When objects offered for donation have been left at the park, but the donation has yet to be approved by the Superintendent.
 - When objects are left at the park unit for photocopy or study.
3. **The objects received are owned by DPR and are returned to the Department by others.** The *DPR 927* is used to document the file and provide a receipt for the other party when DPR-owned objects are received from others. The form is typically used when objects are returned from an outgoing loan or contract for services.

Superintendent's Authorization to Receive Objects

Only persons authorized in writing by the Superintendent may receive and release museum objects from and into the custody of others. These persons may not always have curatorial classifications, but they will have been trained and can ensure that museum objects coming into and leaving a park unit are properly documented and handled. (See sample authorization letter (Figure 3, Chapter 1, page 1.13.)

It is a good practice to schedule the time and place of delivery in advance. If the authorized staff person cannot be present, he/she may delegate responsibility to another individual (for example, a Guide I on duty at the time of the delivery). The alternate should be instructed in the proper procedures for receiving and releasing objects. After the delivery, the authorized staff member should follow up to make sure the paperwork was filled out correctly and all went well.

If you can't be present, arrange for a staff person who is familiar with the procedures for receiving objects to be in attendance to handle the transfer and sign the documentation.

Duration of Temporary Custody

The term limit for temporary custody is 30 days. If the objects are to be held for a longer period of time for any reason, a loan agreement should be completed. A loan agreement should always be completed if the purpose of the transaction is to provide objects for exhibit purposes even if the duration is less than 30 days.

Completion of a *DPR 927, Receipt of Objects* — *Incoming, Step-by-Step*

Prepare the *DPR 927* in triplicate (one original and two copies all with original signatures). Three samples follow (see Figures 29, 30, and 31). Note that the numbers on the instructions correspond with the numbers on the forms.

***DPR 927, RECEIPT OF OBJECTS —
INCOMING***

(Figure 29 – objects owned by others; no previous agreement)

(FIGURE 30 – objects owned by others; authorized agreement in place)

(FIGURE 31 – DPR-owned objects returned to the Department)

Instructions for Figures 29, 30, 31
DPR 927's, Receipts of Objects — Incoming

1. Enter the name of the organization or individual from whom the object was received along with their phone number.

Take into account these special circumstances when receiving objects owned by others where there is no previously authorized deed of gift or loan document:

- Determine ownership of the objects. If the person delivering the objects is not the owner, assess whether he or she has the authorization of the owner to leave the objects in the Department's custody. If so, he or she signs as both the delivery person and the agent.
 - Discuss the terms of the agreement printed on the back of the form and proposed date of removal. Be clear about when and how the objects will be returned.
2. Enter the address of the individual or organization from which the object was received.
 3. Indicate the date and place of delivery.
 4. Have the delivery person sign and print his/her name, and indicate the name of the delivery company (UPS, US Postal Service, etc.). The delivery person may have his or her own receipt requiring a DPR signature. It is permissible to sign the receipt, but the transaction must also be documented with a *DPR 927*. A copy of a delivery person's receipt should always be kept and attached to the *DPR 927*.
 5. The authorized staff person or a designee present at the time of delivery signs and prints his/her name. (See Superintendent's Authorization chapter 1, page 1.13).
 6. List the objects received. Include catalog numbers, if applicable. If the objects arrive packed in boxes that would be impractical to open at the time of delivery, identify the boxes on the form. As soon as possible, unpack the boxes and list the objects on a separate paper to attach to the form.

It is important to note any problems with the condition of the packing materials, as well as any obvious problems with the condition of the objects (e.g., tear lower-left, stain bottom half). Be aware that when the Department takes custody of objects owned by others, it is not responsible for pre-existing conditions.
 7. When you list the objects received on the form, a separate value should be determined for each object. If the current value is not known, add "fair market value at time of loss" in the "Owner's Valuation" column.
 8. Check this box if objects owned by the park are being returned to the unit.
 9. Check this box if the unit is receiving objects owned by others. Also indicate the purpose for depositing the objects along with the scheduled date of removal.
 10. If the owner deposits the objects, have the owner sign and print his/her name and indicate the date.
 11. If an agent of the owner delivers the objects, have the agent sign and print his/her name and indicate the date.
 12. Fill in the number of attachments and staple them to the document.
 13. If the receipt is not associated with a gift or loan, type in the next consecutive activity number. (For example: 794-IR-79.)
 14. If the receipt is associated with a gift or loan, type in the accession number assigned to the gift or the activity number assigned to the loan. (For example: 794-56 or 794-IL-20.)
 15. Indicate who receives the copy.



CALIFORNIA STATE PARKS
MUSEUM COLLECTIONS
 State of California - The Resources Agency
 DEPARTMENT OF PARKS AND RECREATION

Receipt of Objects

14. Activity Number 794 - IR - 231
 13. Number of Attachments _____
 12. _____

INCOMING

Received From 1. Louie G. Wells	Phone/FAX 707/567-1553
Address 2. 1698 Symphony Drive	City - State - Zip Centerville, CA 95895
Date of Delivery 3. August 16, 2000	Place of Delivery Fabled Farm SHP, Visitor Center
Delivery Person's Signature 4. <i>Russell Hanks</i>	Delivery Person's Name Russell Hanks
Receiving Staff's Signature 5. <i>Cece Stegan</i>	Receiving Staff's Name Cece Stegan

Description of Objects (with catalog numbers if applicable): _____ Owner's Valuation: _____

6. Four (4) scrap books of photos and advertisements from Valley Plum Cooperative processing and distribution plant. Scrapbooks span the period 1935-1960. 7. \$50.00 each

8. Receipt of Objects Owned by California State Parks
 California State Parks acknowledges the return of the objects described above.

9. Receipt of Objects Owned by Others
 I am (we are) the lawful owner(s) of the above described objects and/or have legal authority to deposit them into the custody of the California Department of Parks and Recreation for the following purpose:

Purpose: Evaluation for Possible Donation Scheduled date of removal: September 15, 2000

I (we) have read and agree to the conditions listed on the reverse of this document.

Owner's Signature 10. _____	Owner's Name	Date
Agent's Signature 11. <i>Russell Hanks</i>	Agent's Name Russell Hanks	Date 8/16/2000

DPR 927 (Rev. 4/99)(Form)(Excel 4/23/1999) 15 Distribution: Park Files Statewide Records Depositor

Figure 29 – use of a DPR 927: objects are owned by others and there is no previous agreement

RECEIPT OF OBJECTS -- INCOMING

Conditions Governing the Receipt of Objects Deposited with the California Department of Parks and Recreation

Description of Objects

Attributions, dates, valuations, or other information described on this receipt are those given by the owner/depositor unless otherwise specified. The absence of notations regarding the condition of the objects does not mean that the objects were free of defects at the time of receipt.

Removal of Objects

The owner/depositor agrees to remove the objects from the custody of the California Department of Parks and Recreation (hereinafter referred to as DPR) within thirty (30) days from the date of deposit, or upon DPR's request, and at no expense to DPR. Title to the objects listed on this receipt may become vested in DPR if the objects remain unclaimed for an extended period of time and the owner fails to follow prescribed procedures to preserve the owner's interest in the property. See *California Civil Code Section 1899 et seq.*

Standard of Care

DPR will safeguard the objects itemized on this receipt in the same manner as its own property of similar nature.

Alterations and Hazards

DPR will not alter, repair, conserve, or dispose of the objects listed on this receipt without the permission of the owner/depositor, unless a) immediate action is required to protect the objects or other property under DPR's custody, or b) the objects have become a health or safety hazard. See *California Civil Code Section 1899.6.*

Research and Photography

DPR and its agents are authorized to photograph and/or examine by non-destructive means any object listed on this receipt. DPR and its agents may reproduce, distribute, modify, display, publish or otherwise use and reuse the resulting images and/or documentation in any medium for archival, educational, research, exhibition, and/or publicity purposes, but are not obligated to do so. Resulting images and/or documentation will not be made available for other purposes without prior authorization of the owner/depositor.

Release from Liability

The owner/depositor releases DPR, its employees, agents, and contractors from and waives any claims against them for liability or claims arising out of or related to any loss of or damage to the objects listed on this receipt.

Change of Address or Owner

The owner/depositor will notify DPR promptly in writing of any change in address, or change in ownership of the objects listed on this receipt (whether by reason of death, sale, insolvency, gift or otherwise). The terms of this receipt shall be binding upon the heirs, executors, administrators, representatives, successors, agents and assigns of the owner/depositor.

Other Agreement Forms

In case of any difference between this receipt and the agreement forms of the owner/depositor, which DPR may complete upon request, the conditions of this document will control.



MUSEUM COLLECTIONS

State of California - The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

Receipt of Objects

14. 794-12
13. - IR -
Activity Number
12. Number of Attachments 0

INCOMING

Received From	Phone/FAX
1. John S. Bay and Jane M. Bay	818/380-1671
Address	City - State - Zip
2. 1234 Bradley Street	Los Angeles, CA 92313
Date of Delivery	Place of Delivery
3. December 20, 1999	Fabled Farm SHP, Visitor Center
Delivery Person's Signature	Delivery Person's Name
4. <i>John Bay</i>	John Bay
Receiving Staff's Signature	Receiving Staff's Name
5. <i>Prem Singh</i>	Prem Singh

Description of Objects (with catalog numbers if applicable): Owner's Valuation:

6. 1 Cherry Boudlier's journal bound in red leather with gold trim 7.
 1 Silver condiment tray
 1 Creamer with lid (painted blue, decorated with pink roses and green leaves)
 1 Sugar bowl with lid (painted blue, decorated with pink roses and green leaves)
 1 Linen tablecloth 6' x 4' with 6 matching napkins
 4 Crystal knife rests
 1 Crystal saltcellar with 1 silver spoon

(Owners John and Jane Bay delivered objects donated in Deed of Gift 794-12.)

Receipt of Objects Owned by California State Parks California State Parks acknowledges the return of the objects described above.

Receipt of Objects Owned by Others I am (we are) the lawful owner(s) of the above described objects and/or have legal authority to deposit them into the custody of the California Department of Parks and Recreation for the following purpose:

Purpose: Delivery of donated objects. Scheduled date of removal:

I (we) have read and agree to the conditions listed on the reverse of this document.

Owner's Signature	Owner's Name	Date
10. <i>John Bay</i>	John Bay	December 20, 1999
Agent's Signature	Agent's Name	Date
11. <i>Prem Singh</i>		

DPR 927 (Rev. 4/99)/(Front)(Excel 4/23/1999) 15. Distribution: Park Files Statewide Records Depositor

Figure 30 – use of DPR 927: objects are owned by other; authorized agreement in place



14. 794-OL-395
 13. - IR -
 Activity Number
 12. Number of Attachments

INCOMING

Receipt of Objects

Received From	Phone/FAX
1. Long Beach Museum of Art	213/320-2984
Address	City - State - Zip
2. 5101 E. Anaheim Street	Long Beach, CA 90804
Date of Delivery	Place of Delivery
3. April 23, 2000	Fabled Farm SHP - Visitor Center
Delivery Person's Signature	Delivery Person's Name
4. Abe Endres	Abe Endres/Fine Arts Movers
Receiving Staff's Signature	Receiving Staff's Name
5. Christina Kudrina	Christina Kudrina
Description of Objects (with catalog numbers if applicable):	
Owner's Valuation:	

6. Oil Painting: "Fertile Fields" by Jonathan Barclay 794-64-1

7.

Returned after loan to Long Beach Museum of Art.
 See Loan Agreement-Outgoing 794-OL-395.

8. Receipt of Objects Owned by California State Parks
 California State Parks acknowledges the return of the objects described above.

9. Receipt of Objects Owned by Others
 I am (we are) the lawful owner(s) of the above described objects and/or have legal authority to deposit them into the custody of the California Department of Parks and Recreation for the following purpose:

Purpose: _____ Scheduled date of removal: _____

I (we) have read and agree to the conditions listed on the reverse of this document.

Owner's Signature	Owner's Name	Date
10. _____	_____	_____
Agent's Signature	Agent's Name	Date
11. _____	_____	_____

DPR 927 (Rev. 4/99)(Front)(Excl 4/23/1999) 15. Distribution: Park Files Statewide Records Depositor

Figure 31 – use of DPR 927 when DPR-owned objects are returned to the Department

Distribution of Copies

1. Give a copy to the person depositing the object.
2. File the park's copy as follows:
 - a. With the gift or loan to which it relates, if the receipt is associated with a gift or loan, or
 - b. Under its own activity number, along with any supporting information, if the receipt is not associated with a gift or loan.
3. Send a copy to Statewide Museum Collections Records.
4. Record the activity in the park's Accession Book and in the electronic record (TMS).

Returning Objects after Temporary Custody

When returning the objects after temporary custody, the transaction should be documented with the *DPR 929, Release of Objects — Outgoing*. (See pages 6.48–6.56 this chapter for instructions on completing a *DPR 929*.)

Outgoing Loans

Who May Borrow DPR Objects?

As a means of serving the public outside of its own parks and programs, the Department of Parks and Recreation may loan objects to nonprofit museums or universities for the purposes of exhibition or research.

Loans may not be made to other organizations or agencies, to individuals, or to commercial enterprises, except in extraordinary circumstances. Exceptions require the written approval of the Deputy Director for Park Operations.

One of these exceptions is the loan of objects to concessionaires operating in State Parks under contract to the Department. In this case, the loan agreement still requires the approval of the Deputy Director for Park Operations.

Criteria for an Outgoing Loan

Your first obligation is to protect your park's collections for future generations. Before entering into a loan agreement, ensure that the following criteria are met:

1. The identified use for the loaned objects is consistent with the Department's mission, which will take precedence over the mission or goals of the borrowing entity.
2. There is a specific purpose for the loan.
3. The benefits to the public and the Department outweigh the risks to the objects to be loaned.
4. The objects will be used appropriately, cared for responsibly, and made secure.
5. There is a specified term for the loan.
6. The borrowing institution can ensure that the objects will be adequately insured.

The Loan Request

Prior to approval of a loan, you will need to request from the receiving institution the following information in writing, preferably on institutional letterhead:

1. A description of the intended use, including the following:
 - the interpretive themes or research goals
 - the duration of the loan
 - size and nature of the audience
 - benefits to the public or the State Park system.
2. A description of the borrowing institution's facilities and ability to transport, store, exhibit, and protect the objects according to DPR's standards of care or other specified conditions of care. This description can take the form of a Facility Report prepared by the institution, a completed Standard Facility Report published by the American Associations of Museums, or a statement in a letter outlining the circumstances under which the objects will be maintained. (For further information about facility reports, see this chapter, pages 6.14–6.15.)
3. A certificate of insurance showing coverage of the requested objects. The borrowing institution is responsible for returning objects to DPR in the condition in which they were received. A certificate of insurance is evidence that the institution is prepared to accept full responsibility for borrowed objects.

Some insurance only provides coverage up to the market value of an object that has been damaged or lost. This restriction places the Department at a disadvantage when the object has a low market value and high historic value. Consequently, it is desirable to obtain insurance that covers repair or conservation sufficient to restore the object to the condition in which it was loaned. For objects of high monetary value, a certificate of insurance should always be obtained. The Curator reviewing the loan request and the

Superintendent authorizing it must use their discretion in determining insurance requirements.

Preparation of Objects for Loan

Prior to release, make sure each object has the following:

1. A catalog number affixed to the object or the object's container if the object is small.
2. A current object record and accession information.
3. A photograph of the object for identification.
4. A current evaluation of the object's condition. (See also Chapter 8 Condition Reports, pages 8.1–8.14.)
5. A current appraisal of the object's market value, which is normally paid for by the borrowing institution. If it is impractical to obtain information about the value of the objects to be loaned, you may use an asterisk in the valuation column and indicate on the form “*Valuation subject to fair market value at time of loss.” (See also Chapter 8, Appraisals, pages 8.15–8.24.)

Approvals Required for an Outgoing Loan

Museum Curator – An outgoing loan must be reviewed by a Museum Curator who understands the risks involved to the objects. The Curator evaluates the request, object documentation, and appraisals, as well as the borrowing facility, and submits his/her recommendations to the Superintendent. If your park unit does not have a Museum Curator on staff, you should enlist a Curator to assist you. You can secure the help of a Curator from the District, a nearby State Park, the Northern Service Center, or Museum Services Section.

District or Park Superintendent – The Superintendent is responsible for the museum objects in his/her district or park. An outgoing loan request requires his/her approval.

Deputy Director for Park Operations – Loans to commercial entities or private individuals, or loans that will extend for a period longer than two years, require approval by the Deputy Director for Park Operations.

Term of Loan

An outgoing loan should not exceed two years in duration. A loan negotiated for a period of time longer than two years requires the written approval of the Deputy Director for Park Operations.

Renewal of an Outgoing Loan Agreement

To renew an outgoing loan agreement, complete a new *DPR 928, Loan Agreement – Outgoing* form and obtain all required approvals. Reference the previous loan by number and term, and list any new attachments or conditions. The approval process is the same as for a new loan, except the original loan number is kept.

Loan of Objects to DPR Concessionaires

Many park units have contracts with concessionaires, namely individuals or companies that conduct business on park property. When museum objects are loaned to a DPR concessionaire, the loan is subject to the same requirements as any outgoing loan to another institution. In addition, the loan agreement requires the approval of the Deputy Director for Park Operations or his/her designee.

“Loan” of Objects Between State Parks (Transfers)

The temporary or permanent transfer of objects between State Parks is recorded on a *DPR 930, Park to Park Transfer*. For instance, if Marshall Gold Discovery SHP provided Old Sacramento SHP with a number of farming implements for an exhibit, curatorial staff would prepare a *Park to Park Transfer*. When the exhibit ends and the implements are returned, collections staff at Old Sacramento SHP would prepare a *DPR 930* with which to record the return of the objects. (See this chapter, pages 6.57–6.66 for a complete discussion of Park to Park Transfers.)

Completion of a *DPR 928, Loan Agreement* — *Outgoing, Step-by-Step*

DPR 928, Loan Agreement—Outgoing documents the agreement to loan objects to another institution. Its terms are negotiated before objects are turned over to the borrower. A *DPR 928* requires review by a Museum Curator and approval by the Superintendent.

Prepare the *DPR 928* in triplicate (one original and two copies, all with original signatures). A sample form follows. Note that the numbered steps correspond with the numbers on the form (See Figure 32).

***DPR 928, LOAN AGREEMENT —
OUTGOING***
(FIGURE 32)

Instructions for Figure 32 – DPR 928, Loan Agreement — Outgoing

1. Enter the name of the institution borrowing the object.
2. Enter the name of the authorized agent and the agent's phone number and/or fax number.
3. Enter the address of the borrowing institution.
4. List the purpose and period of the loan.
5. Describe the object and include the catalog number.
6. List the owner's (DPR's) valuation of the object. (The borrowing institution normally pays for an appraisal, if one is required.) If it is impractical to obtain information about the value of the objects to be loaned, you may use an asterisk in the valuation column and indicate on the form "**Valuation subject to fair market value at time of loss."
7. Specify any additional conditions not listed on the back of the form.
8. Have the agent sign and print his/her name and indicate the date.
9. Have the Museum Curator reviewing the loan, sign, type or print his/her name, and indicate the date.
10. Obtain the signature of the Superintendent, print or type the Superintendent's name, and indicate the date.
11. In most instances, check the box indicating that the signature of the Deputy Director for Park Operations is not applicable to the transaction. However, you will need to obtain the signature of the Deputy Director for Park Operations or his/her designee if
 - the duration of the outgoing loan exceeds two years
 - the borrower is a commercial entity or private individual
 - the outgoing loan involves some other exception to Department Policy.
12. Indicate on the reverse side how the loaned objects are to be credited. The Department's name, California State Parks, should always appear in the credit line. Three examples are as follows:
 - California State Parks
 - California State Parks, Fabled Farm State Historic Park
 - California State Parks, LaRue Collection
13. Indicate the number of attachments. Information acquired during the negotiation of the loan, becomes part of the loan agreement. Copies should be attached to each signed agreement form.
14. Assign the next activity number in the park's registration system
15. Indicate who receives the copy.



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MUSEUM COLLECTIONS
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 DEPARTMENT OF PARKS AND RECREATION

Loan Agreement

14. 794 - OL - 7
 Activity Number

13. Number of Attachments _____

OUTGOING

Borrowing Institution
 1. Heartland Historical Society
 Authorized Agent and Title _____ Phone/FAX _____
 2. Lacey J. Ferns, Director _____ 559/304-3994
 Address _____ City - State - Zip Code _____
 3. 5969 Peach Blossom Lane _____ Tuleville, CA 95867
 Purpose of Loan _____ Period of Loan _____
 4. Exhibit: The Heartland's Pioneer Women, June 15 - October 15, 2000 _____ May 28-Oct. 31, 2000
 Description of Objects (with catalog numbers): _____ Owner's Valuation: _____

5.	1. 794-52-6 Woman's dress, linen, lavender and rose, ca 1860.	6. \$50.00
	2. 794-52-17 Dress, green and red plaid taffeta, ca 1872.	50.00
	3. 794-52-35 Pair, red fingerless gloves.	15.00
	4. 794-101-1 Pair, gold-rimmed spectacles.	130.00
	5. 794-52-357 Book - - Raids and Romance of Morgan and His Men by Sally Rochester Ford, 1864.	75.00
	6. 794-204-1 Four-page letter written in French from Madam Bowdler to her daughter Cherie (Cherry) LaRue.	300.00

7. Additional condition of the loan:
 No objects are to be exhibited in light measuring more than five foot candles.

I have read and agree to the conditions listed on the reverse of this document and any attachments to it.

8. Agent's Signature Lacey J. Ferns Agent's Name Lacey J. Ferns Date 5/4/2000

Approval by California Department of Parks and Recreation

9. Museum Curator's Signature Christina Kudrina Museum Curator's Name Christina Kudrina Date 5/4/2000
 Superintendent's Signature _____ Superintendent's Name _____ Date _____
 10. Deputy Director of Park Stewardship's or Designee's Signature Clayton R. Strong Deputy Director of Park Stewardship's or Designee's Name Clayton R. Strong Date 5/10/2000
 Not Applicable

11. Distribution: Park Files Statewide Records Borrower

Figure 32 – Sample DPR 928, Loan Agreement – Outgoing

LOAN AGREEMENT -- OUTGOING

Conditions Governing the Loan of Objects by the California Department of Parks and Recreation

Care of Loaned Objects

Borrower shall provide a safe and stable environment for the loaned objects and shall return them in the same condition as they were lent.

In the event of any damage, soiling, or inordinate wear resulting from this loan, the borrower agrees to pay all costs required to restore the objects to as good a condition as when they left the custody of the lender, the California Department of Parks and Recreation (hereinafter referred to as DPR).

Borrower shall not effect repairs, cleaning, or other conservation or restoration treatments without express written permission from DPR.

Borrower shall notify DPR within forty-eight (48) hours after discovery of loss of or damage to the loaned objects.

Borrower shall not remove or alter any registration numbers, museum labels, or specimen tags from the loaned objects, or make alterations of any kind to the objects without prior permission of DPR.

Use of Loaned Objects

Borrower may examine and/or display loaned objects. Any other use of the loaned objects and/or any intellectual property rights associated with them require prior written approval by DPR.

Borrower shall not transfer, license, assign, sell, pledge, mortgage, or part with the possession of the loaned objects or any intellectual property rights associated with the objects.

Borrower shall give credit for the loan as follows: California State Parks,
Fabled Farm State Historic Park

Release from Liability

Borrower waives all claims and recourses against DPR, its employees, agents, and contractors for loss or damage to persons or property arising from, growing out of, related to, or in any way connected with or incident to this agreement.

Borrower shall defend, indemnify and save harmless DPR, its employees, agents, and contractors from all liability, loss, cost, or obligation on account of or arising out of any injury to person or persons or property of any kind, from any cause or causes whatsoever in any way connected with the borrower's use of the loaned objects, including acceptance and re-delivery thereof.

Termination of Loan

Both the borrower and DPR may cancel this loan prior to the period stated in this agreement by providing thirty (30) days written notice to the other party.

Borrower shall coordinate with DPR to insure the safe return of the loaned objects at the conclusion of the loan, and to obtain approval of packing and transportation methods.

DPR reserves the right to inspect and audit loaned objects. The loaned objects may be withdrawn without prior written notice if DPR determines that the conditions of this agreement are not being met or the objects are otherwise in jeopardy.

Other Loan Agreement Forms

In case of any difference between this agreement and the loan agreement forms of the borrower, which DPR may complete upon request, the conditions of this document will control.

Distribution of Copies

1. Mail or present one copy to the representative of the borrowing institution.
2. File the park unit's copy under its activity number, along with any supporting information
3. Send one copy to Statewide Museum Collections Records.
4. Record the activity in the unit Accession Book and in the electronic record (TMS).

Special Terms

Special terms or conditions should be written on the form in the space provided for the listing of objects. Proceed cautiously in this area. The addition of special terms or conditions, or the deletion of those printed on the form, may result in a deviation from Department policy that would require the approval of the Deputy Director for Park Operations. All signing parties must initial any additions, deletions, or modifications.

Tracking Outgoing Loans

It is important to keep track of outgoing loans, to ensure that a loan does not exceed its due date. There are many ways of monitoring loans: one is simply to keep a list; another is to file active loan documents in a separate tickler file until the objects are returned.

Occasionally loans are not returned on time. Most overdue loans can be resolved by contacting the borrower. However, if you discover a long-overdue loan and encounter problems achieving the return of the objects in question, contact Museum Services Section for assistance.

Companion Forms

The *DPR 928, Loan Agreement—Outgoing* does not document the physical transfer of an object into the custody of others. The physical transfer of an object is documented with a *DPR 929, Release of Objects—Outgoing*. Instructions and sample are found in this chapter, pages 6.47–6.56.

Complete a *DPR 927, Receipt of Objects—Incoming* to document the return of objects to the Park. See instructions and samples this chapter, pages 6.25–6.34.

While the signature of a Museum Curator is required on the outgoing loan agreement, it is likely that the Collection Manager will participate in preparing the loan. The Collection Manager may choose to complete a *DPR 932, Collection Manager's Transmittal* to convey information about the loan to the Superintendent whose signed authorization is required on the loan document. See this chapter, pages 6.7–6.12 for further information on *Collection Manager's Transmittals*.

Other Loan Agreement Forms

The institution requesting the loan from DPR may want to use its own loan agreement form. This change is acceptable if the terms of the loan are consistent with those on DPR's loan agreement form. However, the Department controls approval of the loan. The DPR form is designed with the Department's interests in mind. It would be prudent to review the other institution's form with staff in Museum Services Section before proceeding.

Renewal of an Outgoing Loan Agreement

When a borrower wishes to extend a loan agreement, you will need to complete a new *DPR 928, Loan Agreement—Outgoing* form and obtain all approvals. Reference the previous loan by number and term and list any new attachments or conditions. When assigning a number, keep the original loan number. It is not acceptable to use the same loan document and write "Renewed" with a new date on it.

DPR 929, Release of Objects—Outgoing

When to Use a *DPR 929*

The *DPR 929 Release of Objects — Outgoing* is a multipurpose form that documents the physical transfer of objects in the following circumstances:

- Objects are returned to their owners at the conclusion of an incoming loan.
- DPR-owned objects are released to a contractor or vendor. For example, a historic photograph is left with a professional photographer to make a copy negative and print, or a saddle is left with a conservator for minor repairs in accordance with a written proposal for treatment.
- Objects held in temporary custody by DPR are returned to their owners at the conclusion of an incoming loan, review of a potential gift, or at the conclusion of a contract for services.

Superintendent's Authorization to Receive and Release Objects

Only persons authorized in writing by the Superintendent may receive and release museum objects into the custody of others. These persons may not always have curatorial classifications, but they will have been trained and can ensure that museum objects leaving a park unit are properly documented and handled. (See sample authorization letter, Figure 3, chapter 1, page 1.13.)

If an authorized person cannot be present, he/she may delegate responsibility to another individual (for example, a Guide I on duty at the time of the delivery). The alternate should be instructed in the proper procedures for receiving and releasing objects. After the delivery, the authorized staff member should follow up to make sure the paperwork was filled out correctly and all went well.

Completion of a *DPR 929, Release of Objects— Outgoing, Step-by-Step*

Prepare the *DPR 929* in triplicate (one original and two copies all with original signatures). Two samples follow (see Figures 33 and 34). Note that the numbered steps correspond with the numbers on the forms.

Remember to document the condition of the objects in writing before they leave DPR. Take photographs, if possible, for comparison, should the objects be returned to DPR with damage.

***DPR 929, RELEASE OF OBJECTS —
OUTGOING***

(FIGURE 33 – DPR-owned objects are released to others)

(FIGURE 34 – Objects held in temporary custody by DPR are returned to owners)

Instructions for Figure 33 – DPR 929, Release of Objects — Outgoing

1. Enter the name of the company or person to whom the objects are released along with the phone number of the firm or person.
2. Enter the complete address of the organization or individual to whom the objects are released.
3. Indicate the date and place of release.
4. Fill in the purpose for the release of the objects.
5. Specify the scheduled means and date of return if known.
6. The authorized staff person who is present at the time of release signs and prints his/her name on this line. (See Superintendent's Authorization to Receive and Release Objects Chapter 1, page 1.13, Figure 3)
7. Itemize the objects released on the form. If the objects are packed and sealed, list the boxes and include inventory lists for each of them. As a courtesy to the borrower or contractor, place an inventory list in each of the boxes before sealing them.
8. Check the box indicating that the objects owned by DPR are subject to the conditions on the reverse side of the form.
9. Check this box when objects are returned to their owner.
10. Have the person receiving the objects sign and print his/her name and indicate the date. A courier picking up objects on behalf of a borrower or contractor may be reluctant or lack the authority to sign the release statement, which reads:

"I hereby acknowledge the receipt of objects listed on this document from the California Department of Parks and Recreation subject to the terms listed on the reverse of this document."

If you are certain the provisions of the pre-existing agreements are satisfactory to both you and the borrower or vendor, draw a line through the phrase "subject to the terms listed on the reverse of this document." Have the courier initial the change. The statement would then read:

"I hereby acknowledge the receipt of objects listed on this document from the California Department of Parks and Recreation."
11. Check the identification of the person taking possession of the objects and note the source on the form (e.g., driver's license number, known to staff, etc.).
12. Fill in the number of attachments and staple them to the document. Remember, any release of DPR-owned objects must be accompanied by a written agreement—outgoing loan agreement or contract for services—outlining the terms under which the Department agrees to release the objects.
13. If the release of objects is associated with an outgoing loan, enter the activity number assigned to the loan in this space. (For example: 794-OL-7.)
14. If the release of objects is not associated with a loan, assign and type in the next consecutive activity number. (For example: 794-OR-99.)
15. Indicate who receives the copy.



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14. 794-OL-7
 13. - OR -
 Activity Number
 12. Number of Attachments 1

OUTGOING

Release of Objects

1.	Released to Joshua Brewster, Brewster Transport Co.	Phone/FAX (559) 770-9857
2.	Address 4598 Vintage Way	City - State - Zip Tuleville, CA 95867
3.	Date of Release May 28, 1999	Place of Release Fabled Farm SHP
4.	Purpose of Release For Exhibit at Heartland Historical Society	
5.	Schedule Means and Date of Return (if applicable) Brewster Transport Co., October 28, 1999	
6.	Releasing Staff's Signature <i>Prem Singh</i>	Releasing Staff's Name Prem Singh, Museum Technician
7.	Description of Objects (with catalog numbers if applicable): See attached sheet for list of objects.	

8.	<input checked="" type="checkbox"/> Release of Objects Owned by California State Parks	I hereby acknowledge the release of objects listed on this document from the California Department of Parks and Recreation subject to the terms listed on the reverse of this document.
9.	<input type="checkbox"/> Return of Objects to Owner	I acknowledge the return of the objects described above from the custody of the California Department of Parks and Recreation.
10.	Receiving Person's Signature <i>John H. Henry</i>	Receiving Person's Name John H. Henry
11.	Identification (e.g., driver's license) KO849530	Date 5/28/1999

DPR 929 (Rev. 4/99)(From)(Excl 4/23/1999) 15. Distribution: Park Files Statewide Records Owner or Other

Figure 33 – Use of DPR 929 when DPR owned objects are released to others

RELEASE OF OBJECTS -- OUTGOING

Conditions Governing the Release of Objects Owned by the California Department of Parks and Recreation into the Custody of Others

Care of Objects in Custody

Custodian shall provide a safe and stable environment for the objects belonging to the California Department of Parks and Recreation (hereinafter referred to as DPR), and shall return them in the same condition as they were when DPR released them.

In the event of any damage, soil, or inordinate wear occurring while in custody of the custodian, the custodian agrees to pay all costs required to restore the objects to as good a condition as when they left the custody of DPR.

Custodian shall not effect repairs, cleaning, or other conservation or restoration treatments without express written permission from DPR.

Custodian shall notify DPR within forty-eight (48) hours after discovery of loss or damage to the objects.

Custodian shall not remove or alter any registration numbers, museum labels, or specimen tags from DPR's objects or make alterations of any kind to the objects without express written permission from DPR.

Use of Objects in Custody

Custodian may examine and/or display objects. Any other use of the objects and/or any intellectual property rights associated with them that are not specified elsewhere in this agreement require prior written approval by DPR.

Custodian shall not transfer, license, assign, sell, pledge, mortgage, or part with the possession of the objects, or any intellectual property rights associated with the objects.

Release from Liability

Custodian waives all claims and recourses against DPR, its employees, agents, and contractors for loss or damage to persons or property arising from, growing out of, related to, or in any way connected with or incident to the custody of DPR's objects.

Custodian shall defend, indemnify and save harmless DPR, its employees, agents, and contractors from all liability, loss, cost, or obligation on account of or arising out of any injury to person or persons or property of any kind, from any cause or causes whatsoever in any way connected with the custodian's custody of the objects listed in this agreement, including acceptance and redelivery thereof.

Return of Objects

Custodian shall coordinate with DPR to insure the safe return of the objects and to obtain approval of packing and transportation methods.

DPR reserves the right to inspect and audit DPR-owned objects in the custody of others. The objects shall be returned to DPR immediately if DPR determines that the terms of this agreement are not being met or the objects are otherwise in jeopardy.

Other Agreement Forms

In case of any difference between this agreement and the agreement forms of the custodian, which DPR may complete upon request, the conditions of this document will control.

Attachment 1 -- Description of Objects with Catalog Numbers

BOX #1

1. Dress, linen, lavender and rose
794-52-6
2. Dress, green and red plaid taffeta
794-52-17
3. Pair, red fingerless gloves
794-52-35
4. Pair, gold-rimmed spectacles
794-101-1

BOX #2

1. Book -- Raids and Romance of Morgan and His Men
794-52-357
2. Original Letter from Madam Bowdler to Cherie LaRue
794-204-1

BOX #3

1. Silver condiment tray
794-34-2
2. Creamer with matching lid
794-10-8
3. Sugar bowl with matching lid
794-10-9
4. Tablecloth, linen
794-92-15
5. Six (6) napkins, linen
794-92-16 through 794-92-21
6. Four (4) knife rests, crystal
794-26-120 through 794-26-123
7. Set - crystal saltcellar with silver spoon
794-10-54 (saltcellar); 792-10-55 (silver spoon)

Instructions for Figure 34 – DPR 929, Release of Objects — Outgoing

1. Enter the name of the company or person to whom the objects are released along with the phone number of the firm or person.
2. Enter the complete address of the company or person to whom the objects are released.
3. Indicate the date and place of release.
4. Fill in the purpose for the release of the objects.
5. Indicate N/A for not applicable or leave line blank.
6. The authorized staff person or designee present at the time of release signs and prints his/her name on this line. (See Superintendent's authorization to receive and release objects, Chapter 1, page 1.13, Figure 3.)
7. Itemize the objects released on the form and include catalog numbers if applicable. If the objects are packed and sealed, itemize the boxes and include inventory lists for each of them. As a courtesy to the owner, place an inventory list in each of the boxes before sealing them.
8. This box is checked when DPR objects are released to others.
9. Check the box on the DPR 929 indicating return of objects to the owner. (The conditions on the back of the form do not apply.)
10. Have the person receiving the objects sign and print his/her name and indicate the date.
11. Check the identification of the person taking possession of the objects and note the source on the form (e.g., driver's license number, known to staff).

Obtain the owner's written permission if the objects are to be released to a person other than the owner. For example: signed instructions from the owner.

Obtain confirmation in writing if ownership of the objects has changed while in DPR's custody. For example: a letter from the executor of an estate on behalf of the heir.
12. Fill in the number of attachments and staple them to the document.
13. If the release of objects is not associated with a loan, type in the next consecutive activity number. For example: 794-OR-277.
14. If the release of objects is associated with an incoming loan, type in the activity number assigned to the loan. For example: 794-IL-20.
15. Indicate who receives the copy.



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Release of Objects

14. _____
15. 794 - OR - 277
Activity Number
12. Number of Attachments 0

OUTGOING

1.	Released to Gregory G. Greene	Phone/FAX 559/218-1679
2.	Address 4242 Birdsong Way	City - State - Zip Fresno, CA 94850
3.	Date of Release 10/12/00	Place of Release Fabled Farm SHP Visitor Center
4.	Purpose of Release Return of object to owner, following review as potential gift.	
5.	Schedule Means and Date of Return (if applicable)	
6.	Releasing Staff's Signature <i>Roberta Storey</i>	Releasing Staff's Name Roberta Storey, Guide I
7.	Description of Objects (with catalog numbers if applicable): Mano, granite 11cm x 9 cm x 5 cm	

8.	<input type="checkbox"/> Release of Objects Owned by California State Parks	I hereby acknowledge the release of objects listed on this document from the California Department of Parks and Recreation subject to the terms listed on the reverse of this document.
9.	<input checked="" type="checkbox"/> Return of Objects to Owner	I acknowledge the return of the objects described above from the custody of the California Department of Parks and Recreation.
10.	Receiving Person's Signature <i>Greg G. Greene</i>	Receiving Person's Name Gregory G. Greene
11.	Identification (e.g., driver's license) Known to staff	Date 10/12/2000

DPR 929 (Rev. 4/99)(Front)(Excel 4/23/1999) 15 Distribution: Park Files Statewide Records Owner or Other

Figure 34 – Use of DPR 929 when objects held in temporary custody by DPR are returned to owners

Distribution of Copies

1. Give a copy to the person receiving the objects.
2. You can file the park's copy in one of two ways:
 - a. If the receipt is associated with a loan, file with the documentation for that loan.
 - b. If the receipt is not associated with a loan, file the park's copy under its own activity number, along with any supporting information.
3. Send a copy to Statewide Museum Collections Records.
4. Record the activity in the park's Accession Book and in electronic records (TMS).

Park to Park Transfers

What Is a Park to Park Transfer?

A park to park transfer is the change in location of objects from one State Park to another, and the transfer of responsibility for those objects from one Superintendent to another.

Procedures for the Permanent Transfer of Objects between State Parks

The two most common reasons for the permanent transfer of an object from one park to another are these:

- A park has an object with a provenance that makes it better suited to another park. For example, staff at a park where the principal feature is a Spanish Colonial Mission have a Victorian chair they would like to transfer to a park that interprets the appropriate historic period.
- A park has a surplus of a particular type of object and can fill the need at another park for that type of object. For example, staff at a park with three examples of gold mining picks, decides to transfer one to a site in need of a pick.

These are the basic steps for permanent transfers:

1. Be sure that all objects are properly cataloged and marked prior to transfer.
2. Complete a *DPR 930* in triplicate. (See Completion of a *Park to Park Transfer Step-by-Step* this section, pages 6.59–6.66.)

3. Locate the buff copy of the *DPR 444B, Catalog Card*, and the object folder for each item. The *Catalog Card* (buff copy) and object folder accompany the object to the new site. The white copy of the *Catalog Card* as well as the accession document (deed of gift, purchase document, etc.) remain at the park of origin as a permanent record of the accession.

There may not be a catalog card if the object was cataloged on TMS. In that case, a printout of the complete object record should accompany the object to the new site.

4. Note the new location on the buff card and in the Accession Book and the electronic record (TMS).

Procedures for the Temporary Transfer of Objects between State Parks

Occasionally, there is need to transfer objects on a short-term basis from one park to another for exhibits, demonstrations, study, or other purposes. These are the basic steps for such short-term transfers:

1. Prepare a statement or *DPR 932, Collection Manager's Transmittal* (see Figure 26, page 6.11) describing the purpose and time period of the transfer. Correspondence between the Superintendents of the participating parks explaining the expected duration and reasons for the temporary transfer will also serve this purpose.
2. Ensure that all objects are properly cataloged and numbered prior to transfer.
3. Complete a *DPR 930* in triplicate. (See *Completion of a Park to Park Transfer Step-by-Step* this section, pages 6.59–6.66.)
4. Locate the buff copy of the *DPR 444B, Catalog Card* and make a copy of the card to accompany each object to the receiving park.

There may not be a catalog card if the object was cataloged on TMS. In that case, a printout of the complete object record should accompany the object to the new site.

5. Note on the object's buff card, in the Accession Book, and in the electronic record (TMS) that the object has been temporarily transferred to another park.

If the transfer takes place between two parks in the same Sector or District, sometimes the releasing and receiving Superintendents are the same person. In that situation the Superintendent signs in both places.

6. When the time comes to return the object to the park of origin, staff in the receiving park must prepare a *DPR 930, Park to Park Transfer* to reverse the process.

Completion of a *DPR 930, Park to Park Transfer* Step-by-Step

Prepare the *DPR 930* in triplicate (one original and two copies all with original signatures). Two samples follow (see Figures 35 and 36). Note that the numbered steps correspond with the numbers on the forms.

DPR 930, PARK TO PARK TRANSFER

(FIGURE 35 – for the permanent transfer of objects from one park unit to another)

(FIGURE 36 – for the temporary transfer of objects to another park unit; accompanied by a *DPR 932, Collection Manager's Transmittal*)

Instructions for Figures 35 & 36 – DPR 930s, Park to Park Transfers

1. Enter the name of the park releasing the objects.
2. Enter the name of the park receiving the objects.
3. Describe the purpose for the transfer. If the transfer is temporary, indicate that in the description (e.g., for temporary use in an exhibit until June 1998).
4. List the catalog number and object name for each object in the transfer.
5. Obtain the signatures of the releasing and receiving Superintendents. Normally transfers are negotiated and approved in advance. If this is not possible, acquire the Superintendents' signatures as soon as it is practical.
6. At the time of transfer, the DPR staff releasing the objects and the staff receiving the objects sign and print their names and date the *DPR 930*.
7. Indicate the number of attachments.
8. Note: the *DPR 930 Park to Park Transfer* is given different numbers at the sending and receiving parks. On this line, place the next consecutive activity number from your park (the sending park's) registration system. For example, 794-0T-14.
9. On this line, the receiving park places on its copy, the next consecutive activity number. For example: 062-IT-31.
10. Indicate who receives the copy.



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9. 542-IT-24
8. 794 - OT - 8
Activity Number
7. Number of Attachments 1

Park to Park Transfer

1. **From** Park Releasing Objects
Fabled Farm SHP

2. **To** Park Receiving Objects
Stately Mansion SHP

The objects listed below are transferred for the purpose of:

3. Object is surplus to Fabled Farm collection. Will be used as part of kitchen furnishings at Stately Mansion SHP

Description of Objects (with catalog numbers):

4. Upright Refrigerator on rollers. Wood exterior. Lined with zinc and galvanized iron.
Size 57" long x 30" wide x 63" high. Manufactured by L. H. Mace & Co. 1883.
Catalog no. 794-52-203.

5.	From	Releasing Superintendent's Signature	Releasing Superintendent's Name	Date
		<i>Clayton R. Strong</i>	Clayton R. Strong	5/2/1999
6.		Releasing Staff's Signature	Releasing Staff's Name	Date
		<i>Christina Kudrina</i>	Christina Kudrina	5/2/1999
5.	To	Receiving Superintendent's Signature	Receiving Superintendent's Name	Date
		<i>Omar L. Sadat</i>	Omar L. Sadat	5/6/1999
6.		Receiving Staff's Signature	Receiving Staff's Name	Date
		<i>Grace Nieto</i>	Grace Nieto	5/4/1999

DPR 930 (Rev. 4/99)(Excel 4/5/1999)

Distribution: Park From Park To Statewide Records

Figure 35 – for the permanent transfer of objects from one park unit to another



CALIFORNIA STATE PARKS
MUSEUM COLLECTIONS

State of California - The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

9. _____
8. 657 - OT - 196
Activity Number
7. Number of Attachments 1

Park to Park Transfer

1. **From** Park Releasing Objects
Lost Valley SHP

2. **To** Park Receiving Objects
Fabled Farm SHP

The objects listed below are transferred for the purpose of:

3. Fabled Farm SHP exhibit April 30 - September 30, 2000 entitled "Life on the Farm: Then and Now"

Description of Objects (with catalog numbers):

4. Oil Painting: "The Fruit Stand" by Rodrigo Montantes 296 - 8 - 3
Oil Painting "Raisins in the Sun" by Rodrigo Montantes 296 - 8 - 5
Oil Painting "Rhythmic Scythes" by Rodrigo Montantes 296 - 8 - 6

5.	From	Releasing Superintendent's Signature	Releasing Superintendent's Name	Date
		<i>Gilbert Hu</i>	Gilbert Hu	4/2/2000
6.	To	Releasing Staff's Signature	Releasing Staff's Name	Date
		<i>Melissa Steinmeier</i>	Melissa Steinmeier	4/8/2000
5.	To	Receiving Superintendent's Signature	Receiving Superintendent's Name	Date
		<i>Clayton R. Strong</i>	Clayton R. Strong	4/15/2000
6.	To	Receiving Staff's Signature	Receiving Staff's Name	Date
		<i>Prem Singh</i>	Prem Singh	4/8/2000

DPR 930 (Rev. 4/99)(Excel 4/23/1999)

Distribution: Park From Park To Statewide Records

Figure 36 -- for temporary transfer of objects to another park unit; accompanied by a DPR 932, Collection Manager's Transmittal



CALIFORNIA STATE PARKS

Collection Manager's Transmittal

MUSEUM COLLECTIONS

Date: 2/14/2000

State of California - The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

Superintendent's Signature Required on Attached Documents:

- | | | |
|--|---|---|
| <input type="checkbox"/> Deed of Gift | <input checked="" type="checkbox"/> Park-to-Park Transfer | <input type="checkbox"/> Authorization of Extended Hands-On Use |
| <input type="checkbox"/> Loan-Incoming | <input type="checkbox"/> Objects Found On-Site | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Loan-Outgoing | <input type="checkbox"/> Deaccession Nomination | |

Recommended Action:

Fabled Farm SHP is planning an exhibit to complement its summer living history program. One of the highlights of the exhibit will be artwork depicting farming scenes by renowned California artists. The park has asked to borrow three oil paintings from our Rodrigo Montantes collection. Fabled Farm will need the paintings from April 15-October 5,

Argument in Support of Recommended Action:

I recommend that we grant this request. We have transferred objects to Fabled Farm on a temporary basis on two other occasions and had positive experiences both times. The Visitor Center has excellent security and climate control systems in place. In addition, Christina Kudrina, the park's curator, worked for 12 years at the Thornton Art Museum and is highly knowledgeable in the care and handling of works of art. They agreed to limit the light exposure to 5 foot candles in the area where the paintings will be exhibited.

Fabled Farm is located in a community with a large Hispanic population. The inclusion of the Montantes paintings will no doubt serve to attract this segment of the population to visit the exhibit.

Value of the Objects (if applicable):

Based On:

Oil Paintings by Rodrigo Montantes

"The Fruit Stand" \$10,000

"Raisins in the Sun" \$7,000

"Rhythmic Scythes" \$15,000

All figures based on a appraisal by Susan Lawson Appraisers in 1999.

Reservations:

No reservations.

Collection Manager's Signature

Collection Manager's Name

Melissa Steinmeier

Contact Information:

Phone: 695-3943 E-mail melstein@lostvalley.gov

DPR 932 (Rev. 4/99)(Excl 4/23/1999)

Distribution of Copies

1. The sending park's copy of the *DPR 930* is filed under its activity number, along with any supporting documents.
2. The sending park forwards a copy to Statewide Museum Collections Records.
3. The receiving park's copy is filed under its activity number, along with any supporting documents.
4. Each park records the activity in the unit's Accession Book and electronically in the TMS database.

Authorizations for Extended Hands-On Use

Introduction

Museum objects are at the greatest risk of harm when they are handled. The Superintendent, in consultation with a Museum Curator, is responsible for ensuring that museum objects within his/her jurisdiction are used appropriately. Such use should not be determined by how the objects have been used in the past at the park or by the wishes of a donor or lender, but through careful research and thoughtful consideration of the factors described in the list that follows.

Evaluating Proposed Uses of Museum Objects

To evaluate any proposed use of a museum object, you should take these steps:

1. Review the museum object's records for information about its acquisition, past uses, and past repairs or conservation treatments.
2. Identify any legal impediments to the use of the object, including intellectual properties such as copyrights not owned by DPR.
3. Physically examine the object, noting both the nature of its materials and its current condition. In some cases, this examination will require a full condition report by a conservator.
4. Fully identify the object. Determine, as applicable, its kind, type, design or species; its associations with people, places, events, or natural phenomena; its provenance; its rarity; its completeness; its function in its original context or environment; its current religious or cultural associations; and its market value.
5. Identify the circumstances of the proposed use, including environmental conditions, security risks, and duration of use.

6. Determine safety risks involved in the use or operation of the object. For instance, belt guards, modern brakes, and other modifications may be required to use machinery and horse drawn vehicles and equipment in order to meet current OSHA and other regulations.
7. Consider the risks of wear and breakage to the object along with the availability of replacement parts.
8. Determine potential mitigations and their effectiveness for both the short and long term.
9. Determine the availability of similar objects from within your park or from other sources.

Approvals

Museum Curator – *DPR 934, Authorizations for Extended Hands-On Use* must be reviewed by a Museum Curator who understands the risks to the objects and possible mitigations. If your park unit does not have a Museum Curator on staff, you should enlist a Curator to assist you. You can secure the help of a Curator from the District, a nearby State Park, the Northern Service Center, or Museum Services Section.

District or Park Superintendent – The Superintendent, who is responsible for the museum objects in his/her district or park, must approve a request for extended hands-on use of an object.

Conditions for Designating Objects for Extended Hands-On Use

Whenever possible modern replicas should be used instead of museum objects. When this is not possible, the Superintendent, in consultation with a Museum Curator, may designate specific objects from the park's museum collections for extended hands-on use by interpretive staff. In such cases, one or more of the following conditions must be met:

1. The object's provenance does not have special significance.
2. The object is well represented in DPR collections and/or is easily replaced.

3. The object is durable enough for the intended use and/or requires routine operation and maintenance to preserve it. (Some vehicles and equipment fall into this category.)

Objects may not be designated for extended hands-on use under any one of these conditions:

1. The object is an artifact that is original to the site or original to a person or event interpreted at your park.
2. The object is a significant example of its kind or type.
3. The object is rare or irreplaceable.
4. The use of the object is objectionable to the cultural group it represents.
5. The use of the object violates an environmental or professional ethic.

Responsible Interpretation

Museum objects authorized for extended hands-on use should never be handled recklessly or in a way that would encourage staff or visitors to misuse other artifacts or exercise unethical collection practices (e.g., souvenir collecting on site). Staff who present hands-on interpretation of museum objects should convey as part of their interpretation the responsible care and handling of museum objects and the loss that results from removing an object from its context.

Completion of a *DPR 934, Authorization for Extended Hands-On Use, Step-by-Step*

The *DPR 934* documents museum objects designated for use in hands-on interpretation on a routine basis. The form is reviewed by a Museum Curator and signed by the Superintendent.

Prepare the *DPR 934* in triplicate (one original and two copies all with original signatures). A sample form follows (see Figure 37). Note that the numbered steps correspond with the numbers on the forms.

Duration

The maximum duration for an *Authorization for Extended Hands-On Use* is two years. A new term for all or some of the objects may be authorized, using a new *DPR 934* with all required signatures obtained. Copies of any previous authorizations should be attached to the new form.

***DPR 934, AUTHORIZATION FOR
EXTENDED HANDS-ON USE***

(FIGURE 37)

**Instructions for Figure 37 –
*DPR 934, Authorization for Extended Hands-On Use***

1. Enter name of the park and the facility where the hands-on use of the object is to take place.
2. Enter name of the program in which object is to be used.
3. List name of the staff person responsible for the program.
4. Indicate the length of time the object is expected to be used in the program. Remember the maximum term for the authorization is two years. A new term for all or some of the objects may be authorized, using a new *DPR 934*. Copies of any previous authorizations should be attached to the new form.
5. List the objects to be authorized for hands-on use along with their catalog numbers.
6. Describe the mitigations that will be put in place to protect the objects together with any special instructions.
7. After reviewing and approving the proposed use of the objects, the Museum Curator signs, prints his/her name and indicates the date on this line.
8. Have the Superintendent sign, type or print his/her name and indicate the date.
9. Assign the next consecutive activity number in the park's registration system.
10. Indicate who receives the copy.



CALIFORNIA STATE PARKS
MUSEUM COLLECTIONS
 State of California - The Resources Agency
 DEPARTMENT OF PARKS AND RECREATION

9. 794 - HO - 15
 Activity Number

**Authorization for
 Extended Hands-On Use**

- | | | | |
|----------------|--|----------|----------------|
| 1. Park | Fabled Farm SHP | Facility | Visitor Center |
| 2. Program | "A Sheep's Clothing" Handicraft Demonstration | | |
| | Park staff with oversight of the program | | |
| 3. Interpreter | John Ringmaster, Interpreter II | | |
| | Duration of extended hands-on use in the program | | |
| 4. Duration | June 15, 2000 - December 15, 2000 | | |

Description of Objects (with catalog numbers):

5. 794 - 15 - 545 Loom
 794 - 15 - 549 Spinning Wheel
 794 - 15 - 552 Large wicker basket
 794 - 15 - 551 Carding implement
 794 - 15 - 553 Knitting needles, wooden

Mitigations to be in place/special instructions:

6. The objects listed above are for a living history program at Fabled Farm. Volunteers will interpret the way garments were made on Fabled Farm from sheep's wool to the final product. These volunteers have been trained in the handling of artifacts and are aware of the precautions they will have to take to protect the objects.
- The demonstration area will be roped off to create a barrier between visitors and the artifacts. When not in use, a designated area has been set aside for the smaller artifacts in the Visitor Center's locked storage area. The loom is too large to move back and forth, but has a protective cover when not in use.

Approval		
7. Museum Curator's Signature	Museum Curator's Name	Date
<i>Christina Kudrina</i>	Christina Kudrina	9/22/1999
8. Superintendent's Signature	Superintendent's Name	Date
<i>Clayton R. Strong</i>	Clayton R. Strong	9/24/1999
DPR 934 (Rev. 4/99)(Excel 4/5/1999)	10. Distribution: <input checked="" type="checkbox"/> Park Files <input type="checkbox"/> Statewide Records <input type="checkbox"/> Interpretive Staff	

Figure 37 – Sample DPR 934, Authorization for Extended Hands-On Use

Distribution of Copies

1. File the park's copy, along with any related documentation, in its own numbered folder. You may want to flag the folder to call attention to the expiration date.
2. Forward a copy to Statewide Museum Collections Records.
3. Additional copies can be given to interpretive staff or others.
4. Note the hands-on use of the object in the Accession Book and in the electronic record (TMS). Note any resulting changes in location on the *DPR 444B*, *Catalog Cards*, in the Accession Book, or on the TMS record.

Deaccessions

“Stewardship means being entrusted with the management of another’s property and preserving that inheritance. It does not mean keeping everything in a collection for all time.”

Patricia Ainslie, author of *Deaccessioning Strategy at Glenbow, 1992-1997*

Deaccessioning, or the Removal of Objects from Collections

Deaccessioning is the process of permanently removing accessioned objects from a museum collection. It is a useful tool in collections management, allowing for the continual refinement of a museum’s holdings. Deaccessioning does not apply to transfers of museum objects between units within State Parks, or to the disposal of objects or equipment that are not part of a museum’s collection. The deaccessioning and disposal of museum objects from State Parks collections is governed by the Departmental Operations Manual (DOM), Sections 2010.4-2010.4.7, as well as the Code of Ethics of the American Association of Museums.

Why Deaccession?

Almost every park unit with museum collections has on its shelves or in its drawers certain objects, which, if offered today, might not be accepted and accessioned. Sometimes a donor offers objects that the museum already possesses, and acquisition would result in duplication. In other cases the objects may not relate to an institution’s scope of collections, are not representative of a particular genre or historic era or event, have no foreseeable exhibit, research or interpretive value to the institution, or are deteriorated beyond salvage or use. If such objects might not be accepted now, should they be permitted to occupy valuable storage space? Should limited staff time and resources be expended to maintain them?

State Parks employees with responsibilities for caring for museum collections are encouraged to consult their unit’s Scope of Collections Statement, which defines and limits what museum objects a unit collects, the unit’s General Plan and the Mission Statement of State Parks to determine what is truly significant and needs to be maintained for exhibit, interpretation or research, and what should be removed. Objects may be historic or unique, but if they do not relate to the history

or exhibit needs of a park unit or district, they ought to be considered for transfer to another unit in State Parks or deaccessioning. Even objects that have been, “around forever,” ought not to be immune from scrutiny.

Deaccessioning Without Fear

Deaccessioning can be sensitive and controversial. Because its objective is the refinement of DPR’s museum collection through the permanent removal of artifacts, it should not be approached casually. At the same time, deaccessioning should not be avoided because of an apprehension that it is too long and complicated, or possibly bad for the Department’s public image. When carried out according to guidelines presented in this chapter, and with proper documentation, the process can be smooth and relatively painless. It is a standard museum practice, with reviews and checks along the way to ensure that objects necessary to California State Parks’ mission and museum purposes are kept.

Deaccessioning consists of eight basic steps:

1. Determining that the objects are not needed for exhibit, research or interpretive purposes
2. Determining that State Parks has clear title to the objects.
3. Ensuring that the objects are not needed or wanted by another park unit and documenting that effort.
4. Determining the criteria for deaccessioning.
5. Preparing the deaccession proposal for submission to the Museum Services Section of the Archaeology, History and Museums Division.
6. Evaluation of the proposal by a Deaccession Review Committee.
7. Disposing of the objects if the deaccession is approved by the Deputy Director for Park Operations (or designee).
8. Documenting the deaccession and disposal processes.

Deaccession Criteria

The removal of an object from DPR collections may be considered if the unit has an approved Scope of Collections Statement and one or more of the following circumstances apply:

1. The object no longer retains its physical integrity, identity, or authenticity.
2. The object is not relevant to DPR's mission, or is outside of a park's Scope of Collections, or is in excess of DPR's needs for interpretation, research and exhibit.
3. DPR is not able to maintain the object according to prevailing professional standards of care.
4. The public good is better served by the permanent transfer of the object to another custodian.
5. Sacred and funerary object and/or human remains are repatriated to a culturally-affiliated group (see DOM Section 2010.4.5).
6. The object is more significant for the information it could yield if submitted to destructive analysis than it is in fulfilling other DPR purposes.
7. The object poses a threat to the health and safety of staff, the public or to the welfare of other collections.

The decision to deaccession an object should never be influenced by the potential financial benefits that may be accrued by the Department from the object's disposal.

Proposal of Objects for Deaccession

Curators and Collections Managers should review their holdings regularly to assess their condition and evaluate the relevancy of the artifacts to their park's scope of collections and museum purposes. Objects meeting one or more of the deaccession criteria should be recommended to the District Superintendent for deaccessioning. Evaluating of groups of similar objects instead of single examples, or larger rather than smaller groups of objects, can accelerate the deaccessioning process. Curators and Collections Managers also should make sure that DPR has clear title to the objects, there are no restrictions on

deaccessioning contained in the Deeds of Gift or other documentation, and that the objects have been properly accessioned into State Parks collections.

In a system as large as California State Parks, it is quite possible that one park's discards may be another's treasure. Materials approved by the District Superintendent for removal, therefore, should be offered for transfer to other State Parks units prior to proposing a deaccession. Other parks can be contacted by posting a notice on "Calcollections," the Curators and Collections Managers listserv or by consulting the *Park to Park Index* and *California State Parks Museum Directory*. If a park agrees to accept the objects, the procedures contained in the section on Park to Park Transfers in this *Handbook* should be consulted. Once all alternatives for disposition of the objects within State Parks have been exhausted, the District Superintendent should submit the deaccession proposal to the Museum Services Section.

Groups of duplicate or like objects may be proposed together. Printed materials (books, magazines, pamphlets, forms, etc.) often are accessioned as artifacts, resulting in accumulations of duplicate items that take up large amounts of space and resources. Archival materials also may contain duplicate materials and records of little historical value that do not warrant permanent retention. Deaccessioning of printed and archival materials does not require separate justifications for each item or group of items. They can be proposed, described, and disposed of in bulk, e.g. by the box or even the pallet load, if necessary. In such cases, however, the deaccession process still must be followed and documented.

Deaccession proposals should include the following documentation for each object or group of objects:

1. The letter from the District Superintendent to the Museum Services Section proposing the deaccession. (See Figure 38 for sample letter).
2. A copy of the accession document and/or any supporting information (e.g. deed of gift, correspondence describing original intent of the acquisition, appraisal, etc.).
3. A copy of the catalog record (library materials may not have a catalog record).
4. A photo or digital image of the object (if available).
5. Deaccession Proposal Worksheet, prepared by the Collection Manager and containing the justification for requesting deaccession. This may be recorded on a separate page, if necessary. A single justification may be sufficient for duplicates or groups of similar objects (See Figure 39).

Collections Managers may wish to track the deaccession process by a Deaccession Procedure Checklist (See Figure 39a).

Deaccession Review Committee

Upon receipt of the deaccession proposal, the Museum Services Section will convene a Deaccession Review Committee consisting of at least three members representing two or more districts or divisions to evaluate it. At least one member must have the classification of Museum Curator. Depending on the types of objects being considered, interpreters, archivists, archaeologists, historians, or maintenance personnel may serve. Subject matter experts may also be asked to advise the Committee in its evaluation. Staff from a district or headquarters division proposing objects for deaccession may not serve on the Committee, but they may participate in the review process, and may be asked to provide additional information regarding the objects being considered.

At the conclusion of its evaluation, the Deaccession Review Committee will submit its recommendations to the Deputy Director for Park Operations for review and approval. The District Superintendent will be provided with written approval or denial of the deaccession and the proposed method for disposal of the objects.

Alternatives for Disposal

After approving the deaccession, the Deaccession Review Committee recommends the manner of disposal of the objects, although staff proposing the deaccession are encouraged to make recommendations. Disposal should be carried out in a timely manner. Deaccessioned objects should not be allowed to remain on State Parks property indefinitely.

The method of disposing of deaccessioned objects must serve the best interests of the public. The means for disposal could include the following alternatives:

1. Gift (permanent transfer) to a public museum, library, archives or government agency that has a mission and collections related to the deaccessioned object.
2. Sale at public auction or by competitive bid. (Archaeological materials may not be sold.)
3. Survey for scrap value. (An example would be a large piece of deteriorated metal equipment.)

4. Destruction (i.e. burning), transfer to a landfill, transfer to a licensed toxic materials disposal company, or destructive analysis.
5. Exchange between DPR and another institution. However, this exchange is to be considered as two separate activities that must be justifiable in themselves: a deaccession and an acquisition.

Transfer of a deaccessioned firearm to a new owner, even to a museum or public agency outside of State Parks, must be processed through a Federal Firearms Licensee.

If the Deaccession Review Committee recommends auction or other sale of the deaccessioned objects, the Museum Services Section will coordinate the auction or sale, and will administer the proceeds. In conformance with DOM Section 2010.4.4 and the Code of Ethics of the American Association of Museums, proceeds from the sale of deaccessioned objects shall be used only for the development or direct care of DPR's museum collections.

DPR employees involved in the deaccession process or associated with the collections from which the objects came, may not purchase, or cause to be purchased, deaccessioned objects. As state-owned property, a museum object may not be disposed of through gift to an individual. In cases where the donor of a deaccessioned object wishes to re-acquire it, he/she may pursue his or her interests on an equal basis with other members of the public.

The Department is under no obligation to notify donors of deaccession activities, and usually does not do so. Notification is a matter of courtesy. The District Superintendent may recommend notifying a donor if he or she believes notification to be in the best interest of the Department.

Documentation

Since the deaccessioning and disposal of museum objects can be controversial, thorough record keeping is essential. Records of deaccessions are kept in two locations: the originating park unit, and headquarters. Consequently, collections managers should make sure that copies of all documents are filed in the park unit, and in Statewide Museum Collections Records located in the Museum Services Section.

Original documentation filed in the unit and copies filed with the Statewide Museum Collections Records should include as many of following materials as possible:

1. Correspondence from the District Superintendent proposing objects for deaccession.
2. Supporting information (e.g., deed(s) of gift, accession document(s) correspondence describing original intent of the gift(s), appraisals, etc.)
3. Copies of the catalog records.
4. Photograph or digital image of the object(s), as appropriate.
5. "Deaccession Proposal Worksheet," containing justification for the deaccession (this may be on a separate page).
6. "Deaccession Procedure Checklist."
7. Approval for the deaccession, signed by the Deputy Director for Park Operations (or designee).
8. Record of the disposal of the objects, including correspondence, sales records and documentation from a Federal Firearms Licensee, if appropriate.

Once the deaccession has been approved, "Deaccessioned," and the date should be noted on all records relating to the object, including the following records:

- Accession book
- Accession file
- Title document (deed of gift, will, etc.)
- Object file
- Catalog cards (white and buff copies at unit; pink copy at SMCR)
- TMS record. Steps for updating TMS records can be found in the "Deaccessioning" section of the Department's TMS User Manual.

Since headquarters staff is responsible for coordinating deaccessions, each deaccession is assigned the next deaccession activity number in the Museum Services Section's registration system. For example:

091[SMRC registration location number-D[for deaccession]-
52[activity number]

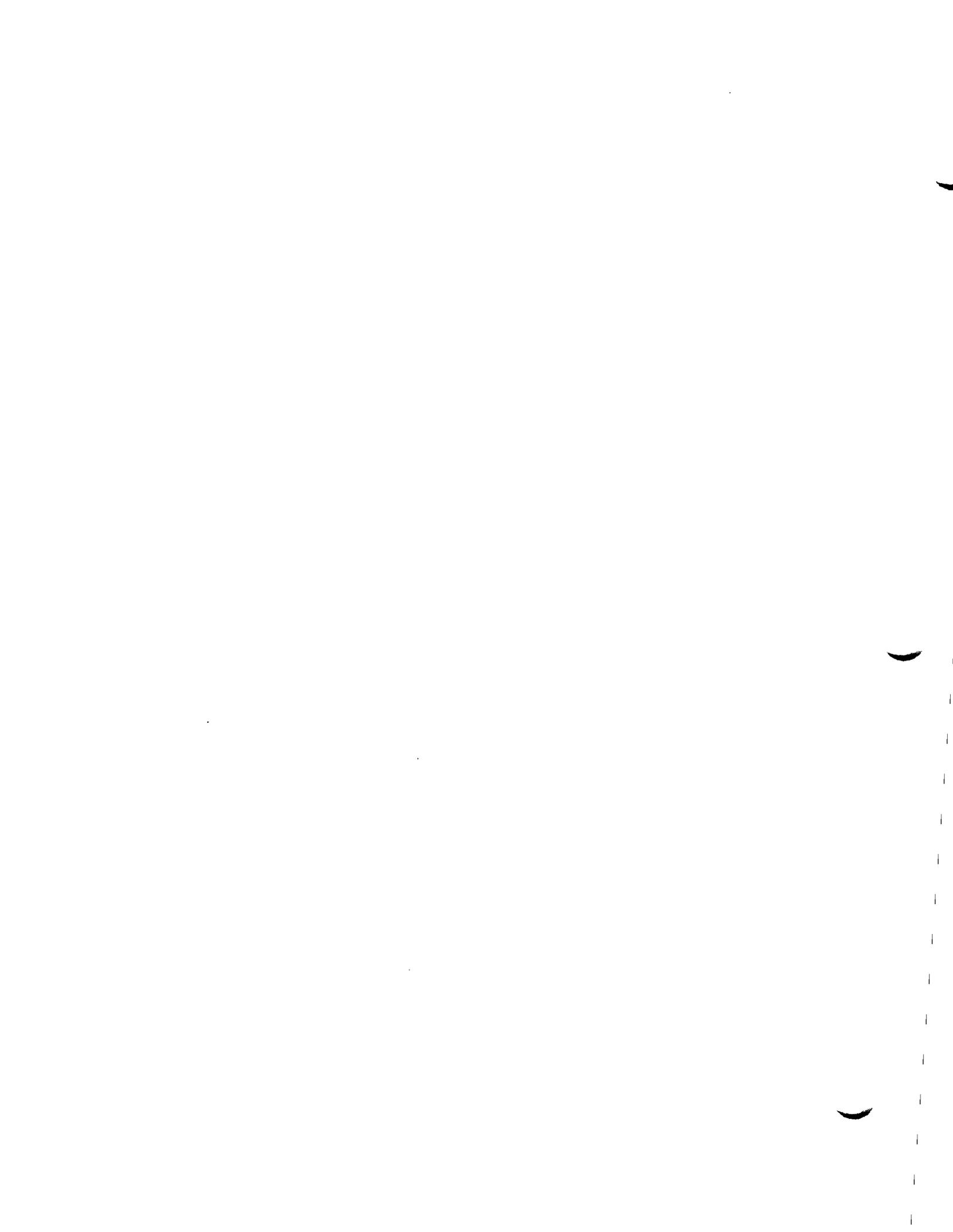
The Museum Services Section retains a set of deaccession documents for filing with the State Museum Collections Records

When in Doubt

Questions may arise throughout the deaccession process regarding the appropriateness of an object for disposal, writing the justification or proposal, Deaccession Review Committee actions, documentation, etc. Park unit and district staffs are encouraged to seek advice through the Curators and Collections Managers listserv or contact the Museum Services Section at (916) 651-6954.

***DEACCESSION PROPOSAL
LETTER***

(FIGURE 38)



State of California – The Resources Agency

Memorandum

Date : September 17, 2007

To : Clio D'muse, Manager, Museum Services Section
Archaeology, History and Museums Division

From : **Department of Parks and Recreation**
Salinas Valley District, Fabled Farm State Historic Park

Subject : Deaccession Proposal

Salinas Valley District proposes for deaccessioning the following museum object held by the Fabled Farm State Historic Park, based on criteria listed on the attached Deaccession Proposal Worksheet:

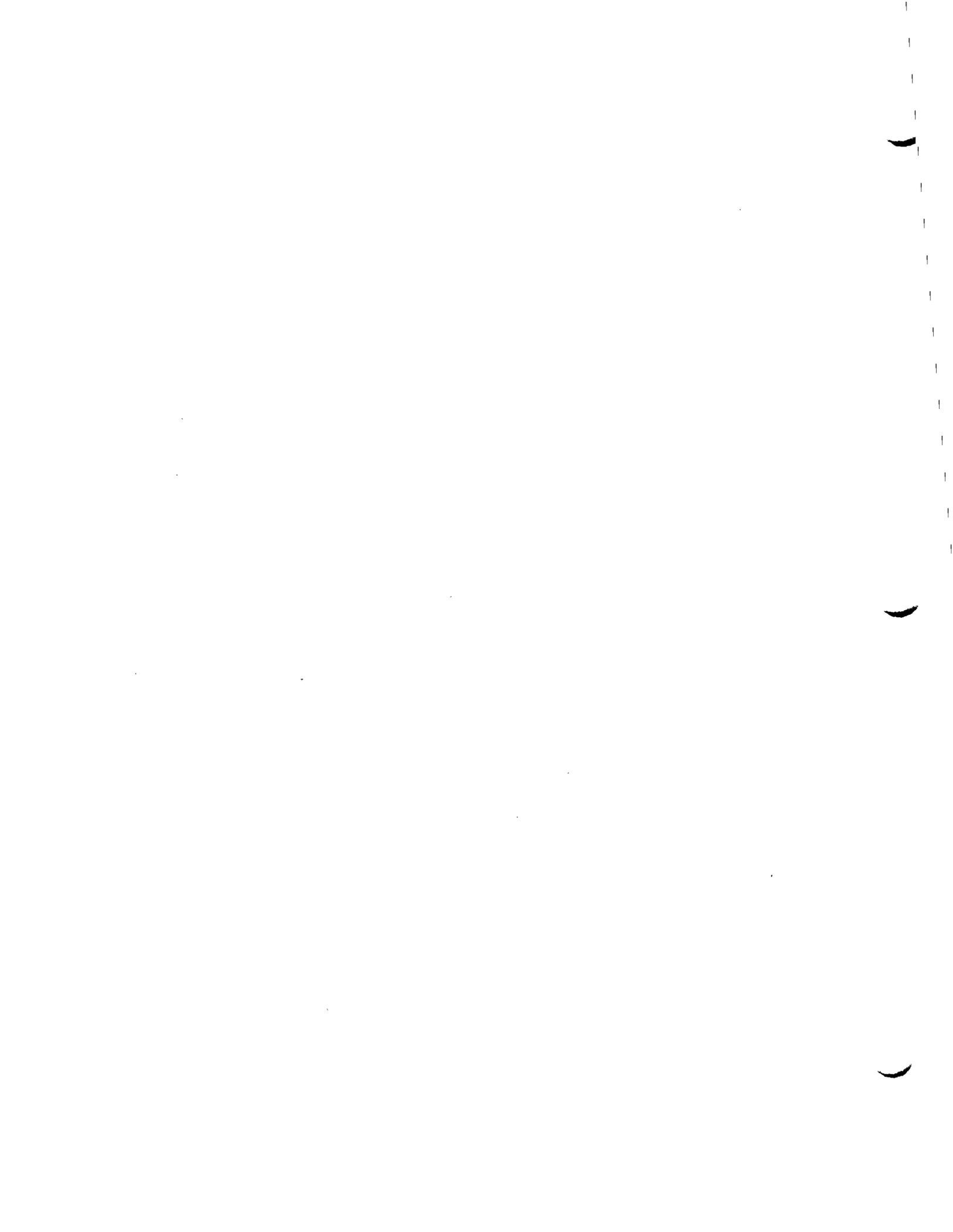
John Deere Mobile Mechanical Peanut Sheller, ca. 1929.

Fabled Farm is currently evaluating its collection of agricultural equipment to identify priorities for restoration, display and long-term preservation. Part of that process includes analyzing the potential use of each object vis-à-vis our interpretive needs, funding and space availability. After this review, we may have additional recommendations for deaccessions.

Please let me, or Museum Curator I Christina Kudrina, know if you have any questions or concerns relating to this proposal.

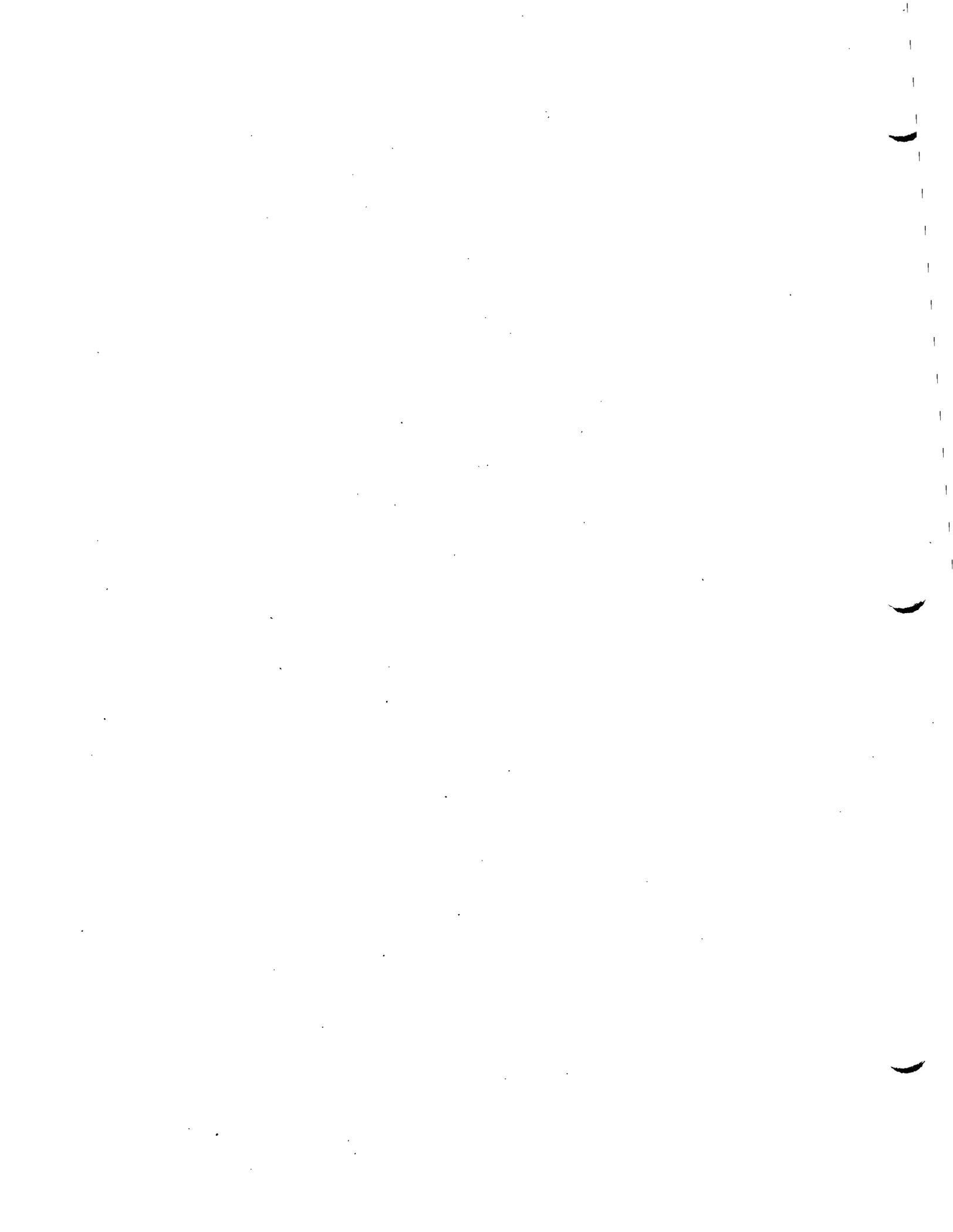
Clayton R. Strong
Salinas Valley District Superintendent

Figure 38 – Deaccession Proposal Letter



***DEACCESSION PROPOSAL
WORKSHEET***

(FIGURE 39)



CALIFORNIA STATE PARKS

DEACCESSION PROPOSAL WORKSHEET

To be completed by Collections Manager

Catalog # _____

Activity # 091-D-

Approved Scope of Collections Statement: () yes () no

Description: (attach an additional sheet if necessary)

Source:

- () Gift
- () Bequest
- () Purchase
- () Found On-Site
- () Unknown
- () Other (please specify)

Title Information:

- () Deed of Gift
- () Will
- () Purchase documents
- () DPR Form 931 (found on-site)
- () None
- () Other (please specify)

Deaccession criteria: (check all that apply)

- () The objects no longer retain their physical integrity, identity, or authenticity.
- () The objects are not relevant to DPR's mission, are outside of a park's scope of collections, or are in excess of DPR's needs for interpretation, research or exhibit.
- () DPR is unable to maintain the objects according to prevailing professional standards of care.
- () The permanent transfer of the objects to another museum or government agency would better serve the public good.
- () The park has in its possession sacred, funerary objects, and/or human remains that require repatriation to a culturally affiliated group (e.g.) Native American materials which fall under NAGPRA),
- () The objects are more significant for the information they could yield if submitted to destructive analysis, than they are in fulfilling other unit or departmental purposes.

Disposition: (attach sheet if necessary, see *MCMH Vol.II*, pp. 6.79-6.80 for disposal options)

Park(s) contacted for transfer _____

Museums/other agencies contacted _____

Suggested disposition _____

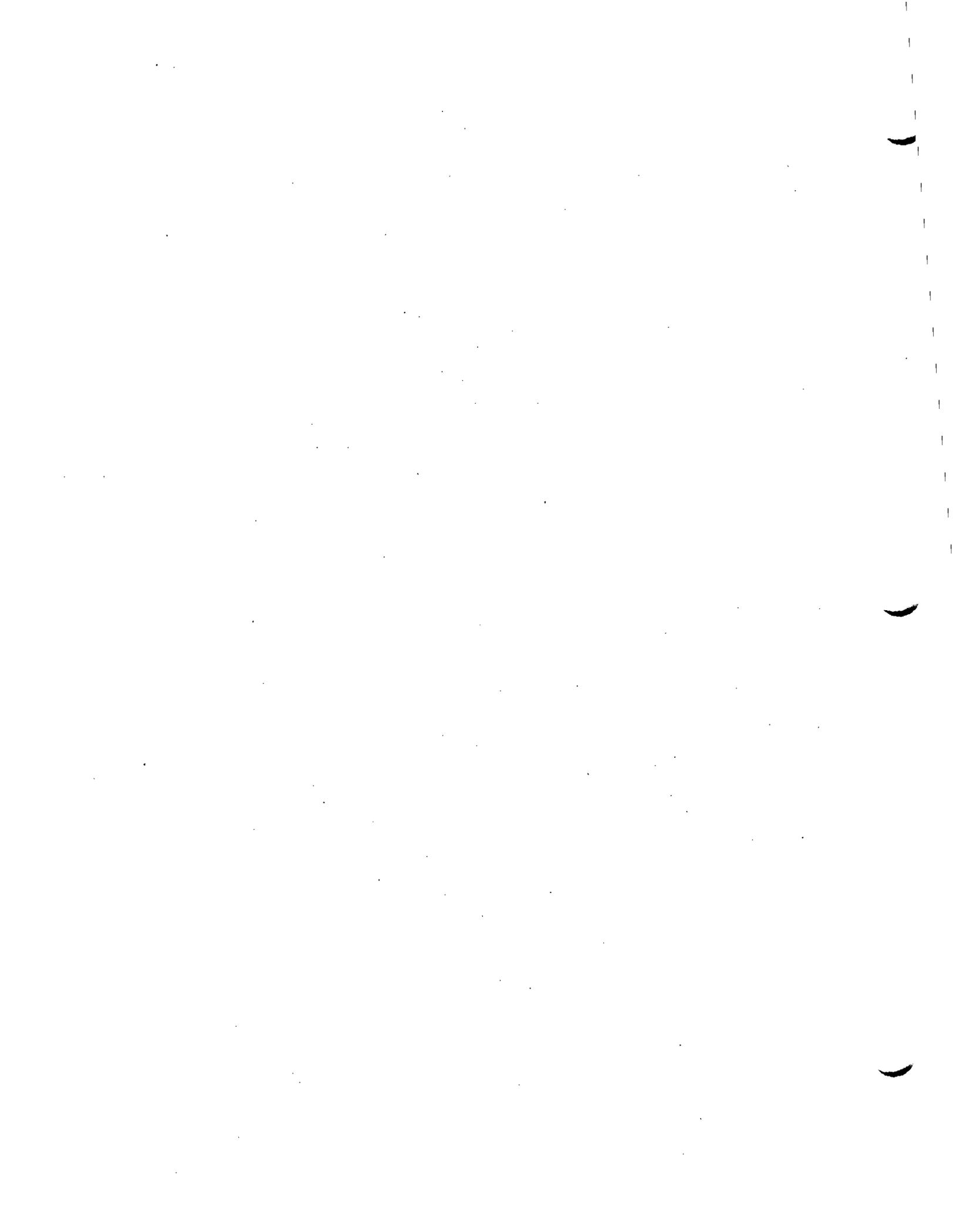
Superintendent's approval _____

(name, title, date)

This form completed by _____

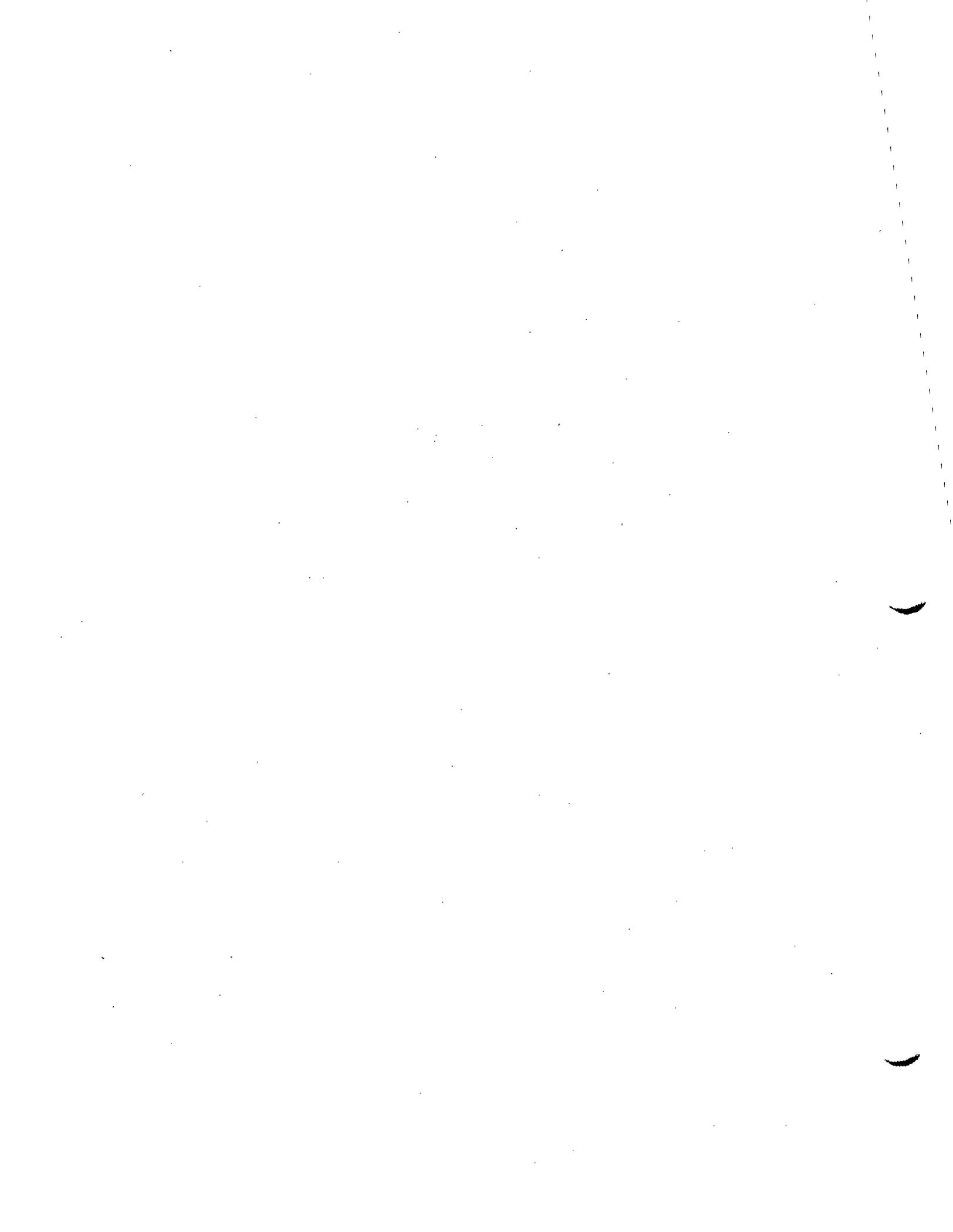
(name, title date)

Figure 39 – Deaccession Proposal Worksheet



***DEACCESSION PROCEDURE
CHECKLIST***

(FIGURE 39a)



CALIFORNIA STATE PARKS

DEACCESSION PROCEDURE CHECKLIST

Catalog # _____
Activity# _____

Deaccession Process:

Deaccession proposal completed by Collection Manager.

District Superintendent's letter proposing deaccession.

Date: _____

Deaccession Review Committee approval of proposal.

Date: _____

Approval by the Deputy Director for Park Operations (or designee).

Date: _____

Records Annotated:

Accession File

Object File

Catalog Card

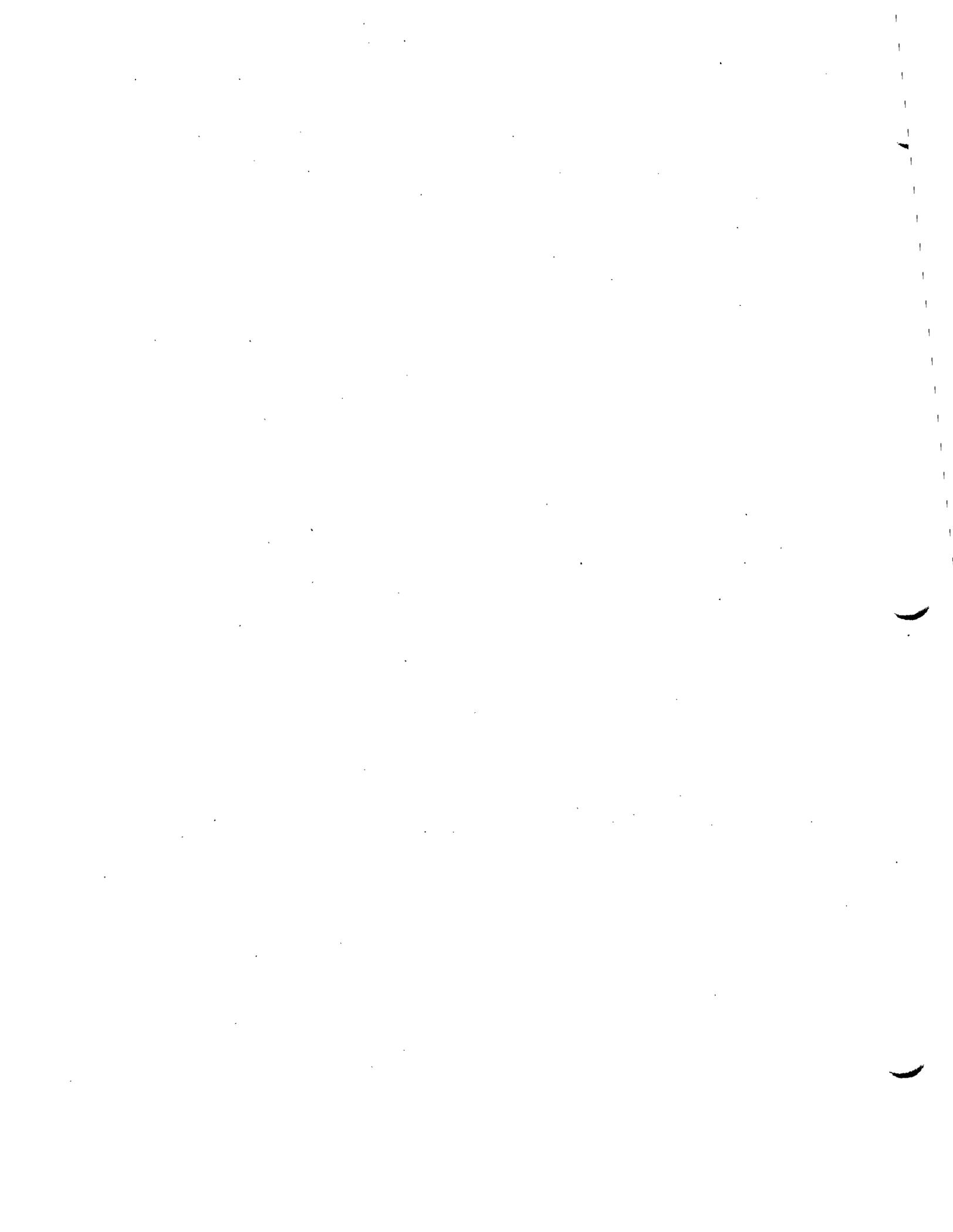
Title Document (deed of gift, will, etc.)

TMS Record

Disposition:

Disposition Date: _____

Figure 39a – Deaccession Procedure Checklist



CATALOGING

Cataloging is discussed in Chapter 5 of this Handbook from the perspective of a museum's overall registration system. This chapter expands on that discussion and describes in detail how three-dimensional objects are cataloged in California State Parks.

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CHAPTER 7

Cataloging General Collections

What Is Cataloging?

Cataloging is the creation of a list of all objects in a park unit's permanent collection. The list is arranged systematically, with each object assigned a unique, sequential number. Individual catalog records document physical and historical information about objects in the collection. These records often include details that go beyond those contained in accession documents. A typical catalog card includes an object's source, materials, color, dimensions, condition, location, and provenance, as well as a photograph for identification.

In the cataloging process, it is essential to follow consistent standards for recording information. Once created, catalog records enable park staff to know what objects are in their unit's collections and where to find them. The catalog list is indispensable for collection accountability.

What Types of Objects Are Covered in This Chapter?

This chapter covers three-dimensional museum objects only. A different process is used to catalog archival materials (also called documentary collections), such as business papers, letters, meeting minutes, photographs, and scrapbooks, etc. The cataloging of both published and unpublished archival materials will be covered in Chapter 9 Special Collections when that section is completed.

Archeological and paleontological collections are also cataloged differently than a museum's general collections. For further information on the cataloging of archaeological collections see "Numbering Archaeological Sites and Collections," Chapter 4, page 4.12. For information about cataloging paleontological collections, see Chapter 4, page 4.16.

When Should Museum Objects Be Cataloged?

Ideally, you should catalog an object as soon after it is accessioned as possible. You may catalog objects in a gift, for example, as soon as the owner and the District Superintendent have signed the *DPR 925, Deed of Gift*, and the Department has clear title to the gift. However, cataloging can take place anytime once the object is in the Department's ownership. Cataloging is frequently done when a collection is inventoried and items are discovered without numbers on them.

For the protection of the objects and accountability, it is especially important to catalog them before they are loaned out, displayed in an exhibit, or used in hands-on demonstrations.

What Are the Traditional DPR Classifications of Museum Objects?

California State Park's museum collections have traditionally been classified under the nine broad categories listed below. Prior to the advent of computers, these classifications provided a way of organizing records of like items. They remain a useful tool in cataloging DPR collections.

Archaeology Specimens. Objects or samples collected as part of an archaeological project. These include objects from DPR properties that for some reason were not accessioned according to DPR's archaeological registration system, and objects collected by others and donated to DPR.

Architectural Specimens. Architectural features separated from a structure (e.g., door, light fixture) that are sufficiently important to be retained with museum collections. This category does not include all remnant materials from building restorations.

Art Objects. Paintings, sculptures, drawings, prints, tapestry, and other objects that are created primarily for aesthetic purposes.

Documentary (Archival) Material. Published and unpublished materials, including books, manuscripts, letters, maps, newspapers, and photographs.

Ethnographic Material. Objects relating to indigenous cultures, primarily Native American.

General Artifacts. All objects not included in other classifications like furniture, textiles, and tools.

Natural History Specimens. Animal, plant, or mineral specimens.

State Park Memorabilia. Objects relating to the history of the State Park System (e.g., documents, oral histories, uniforms, badges.)

Vehicles and Machinery. Transportation vehicles (e.g., wagons, locomotives), industrial or agricultural machinery (e.g., pelton waterwheels, hay balers), or large military pieces (e.g., cannons), or parts associated with them.

Levels of Cataloging

The Three Levels of Cataloging

To have proper accountability, every object in the permanent collection must have a catalog record. How complete each record is depends on many factors—the available resources in terms of workload, time, and staff; the nature of the objects; the historical or interpretive significance of the objects; the amount of research needed to catalog the objects; the backlog of total items requiring cataloging; the expertise of the person doing the cataloging.

Taking these factors into consideration, you will need to exercise your best judgment in deciding how complete to make the catalog record for each object. You may find the following guidelines for minimal, basic and full-level cataloging helpful in making that decision:

Minimal Level

Sufficient information should appear in a catalog record to distinguish one object from all others and to identify what the object is and where it came from. If you can do nothing else, record this information:

- Unique catalog number
- Name of object
- Location

When curatorial staff conduct inventories involving large numbers of objects, they will frequently opt to do “inventory cataloging” and record this minimal level of information.

Basic Level

This is the level of information that should be recorded on a catalog record under normal conditions. However, the fields that are essential to complete will vary according to the type of object. The information that needs to be captured for a wagon will be different from the information that needs to be captured for an Indian basket, a set of china, a mounted seagull, or a painting, etc.

One thing to keep in mind is that you won't always have enough information, even with extensive research, to complete all the recommended fields even at the basic level.

Full Level

There will nearly always be items in a collection that deserve full cataloging due to their historical significance, their significance to the collection, or their popularity with park visitors.

In addition to all the information you would collect and record for an object at the basic level, full level cataloging involves in-depth research to learn as much about the object as possible. Here are some of the questions you might ask in researching the background of the object:

- What can we tell about the object from its physical appearance?
- How was the object used and by whom?
- How would the object have been valued in its time?
- How common or how rare was it?
- Is it possible to trace relationships of people associated with the artifact?
- Are there histories, journals, diaries, business documents, letters and articles that might shed light on the origins or manufacture of the object?
- Is it possible to interview the original owners or descendants of the owners, or park personnel to learn more about it?

The Concord coach at Marshall Gold Discovery State Historic Park is an example of a museum object that merits a full catalog record. Concord coaches, in their day, were widely admired for their superb construction and durability. They were used extensively on stagecoach routes to California's towns and mining camps during the Gold Rush era. The coach at the park is a mail stage and is prominently displayed in the visitor center. It is so well liked by visitors that according to one Marshall Gold Superintendent, "The coach has its own constituency."

Updating Catalog Records

Cataloging is an open-ended task. Anytime something is done to an object, it should be recorded on the catalog card. It is essential to update a catalog record when an object changes location or condition (change in physical state), or when an object is damaged, missing or deaccessioned, or when an object has been conserved. In addition, historical information can be added to a catalog record at any point in time.

Assigning Catalog (Object) Numbers

The Three-part Catalog Number

Every DPR museum object should have a unique catalog number to associate it with its documentation and differentiate it from other objects. DPR catalog numbers have three parts (e.g., 794-74-3). Although the first two parts of a number are shared with other objects from the same accession, the third part of the number makes the catalog number unique.

Catalog Numbers for Objects from a Documented Accession

The catalog numbers for all objects in the same accession start with the same two-part accession number. The third part of the catalog number is assigned to each object in sequence. For example, if you have an accession containing three objects with the accession number “794-53,” the catalog numbers would be as follows:

794-53-1
794-53-2
794-53-3

Catalog Numbers for Objects Whose Source Is Unknown

When you find objects in your collection without a number and without any apparent documentation, you should assign them an “X” number to track them until they can be associated with an accession or otherwise identified. All catalog numbers for unidentified objects start with the same two parts: the registration location number, followed by an “X.” The third part of the catalog number is assigned to each object in sequence. For example, the first two unidentified objects found and numbered at a park with the registration location of “794” would be as follows:

794-X-1
794-X-2

When a third unknown object is found, you would assign it this number:

794-X-3

If you are successful in finding documentation after the “X” object is cataloged, you can still associate the new information with the “X” object.

Moreover, if you are able to identify an accession or object number, that number should be noted on the *DPR 444B, Catalog Card*, and in the accession file. Recataloging the object is not necessary, but if the item is recataloged, the old “X” number should be noted and the Catalog Cards should be cross-referenced.

Do not remove any old numbers from the objects themselves. If you are cataloging electronically, change the accession number on the Object Record using the Super Field Object Screen. Add the old number into the Old Number Field.

Alternative Way to Number a Group of Objects Whose Source Is Unknown.

An alternative way to number a group of objects whose source is unknown is to give them a special number for the project you are working on by taking the next available accession number for your park unit. When the staff locates the source for one of the objects, they can then give the object a new accession number. You do not have to change the number on the object, because you can find it either by its original “special” number or by its new accession number. The advantage of this method is to associate objects from an inventory or other special project, and to avoid the negative connotation of the “X” accession. Another advantage is to avoid the unfortunate likelihood that future handlers of the object will assume it is an “X” and not take the time to check the records for the possibility of the addition of information after the object was marked with its X number.

“Z” Numbers Assigned for Tracking Purposes

“Z” Numbers are used to track transient or ephemeral objects such as interpretive program aids. These objects are not part of the permanent collection. A tin cup purchased for a display in an unprotected house museum is an example of an object that might assigned a “Z” number. A “Z” number consists of the registration location number, the letter “Z,” and the next number in sequence. For example:

794-Z-16

For an expanded explanation relating to tracking numbers see Chapter 5 Registration, pages 5.15–5.16.

Distinguishing Objects with Duplicate Numbers

Occasionally you will come across objects that have been assigned the same number. In such cases, the typical practice has been to add “.D” to the end of one of the numbers. If there are several objects assigned the same number, then a sequence such as “.D,” “.D2,” “.D3” may be used.

What to Do with Old Numbers

It is common to find objects that have been assigned numbers that are different in format from the current numbering system. These “old” numbers may relate to an early registration system used in State Parks or to a numbering system used by the donor or previous collector. Whenever possible, old numbers should be retained and should not be removed from objects.

If you decide to renumber an object because the old number series is ambiguous, cross-reference each catalog record so that relationships are not lost. This situation may occur if you have an object from an unknown source marked with an “X” number. Let’s say the object has the number 794-X-90 and you wish to associate the object with its accession number which you have learned is 794-53. In this situation, cross-reference the numbers on their respective catalog cards and in TMS, use the Accession ID and Old Number fields. You do not need to mark the new number on the object itself.

Numbering Pairs, Sets, and Objects with Multiple Parts

Museums vary in their numbering systems, particularly when it comes to the troublesome area of numbering pairs, sets, and objects with multiple parts. The Department of Parks and Recreation follows these basic principles when numbering such objects:

- The most important thing about an object number is that it is unique.
- The object number is the link between the object and its documentation.
- It is essential to be consistent in the way objects are numbered.
- Giving unique numbers to each object allows for the records to reflect that objects in a pair or set have been placed in separate locations. (For instance, the records can show that one shoe of a pair is on exhibit and the other is in storage.)
- It is essential to link such objects through cross-referencing on catalog cards or electronically through TMS.

Pairs

When assigning catalog numbers to a pair of shoes, a pair of cuff links, a pair of mittens, a pair of pillow cases, give each item in the pair its own unique number. If cataloging manually, cross-reference the related objects on each *DPR 444B Catalog Card*. If cataloging electronically, link the objects in TMS.

Sets

When assigning catalog numbers to a table and matching chairs, a salt and pepper shaker set, twelve place settings of dinnerware, give each item in the set its own unique number. If cataloging manually, cross-reference the related objects on each *DPR 444B Catalog Card*. If cataloging electronically, link the records in TMS.

Objects with Multiple Parts

When assigning catalog numbers to a cup and saucer, a teapot and its lid, a sword and its sheath, or several bones of a seabird, give each item its own unique number. If cataloging manually, cross-reference the related objects on each *DPR 444B Catalog Card*. If cataloging electronically, link the objects in TMS.

Pieces of an Object Once Whole

Suppose you must catalog the remains of a wagon now reduced to three wheels and a seat, or a serving platter broken into four large pieces. Since in all cases, the pieces were once part of a whole object, you will assign a single number to all the parts. Carefully describe which parts exist and which do not in the catalog record, along with the date.

If you have several pieces that are probably part of one object, but you are not sure, give each piece a separate catalog number and cross-reference the catalog cards if cataloging manually. If cataloging electronically, give each of the pieces a separate number and link the pieces in TMS.

Numbering Documentary, Archaeology, and Paleontology Collections

Numbering Documentary Collections

Published and unpublished documentary collections are assigned catalog numbers differently than three dimensional museum objects. If you are cataloging documentary-type collections such as a scrapbook filled with photographs and postcards, a box of letters, several account books and bills of sale from a business, or a shelf of books, call Museum Services Section and ask to be referred to an archivist who can assist you.

Numbering Archaeology and Paleontology Collections

Both archaeology and paleontology collections are numbered differently from other museum collections. (See Chapter 4, page 4.12 for information on numbering archaeological sites and collections. See Chapter 4, page 4.16 for information on cataloging and numbering paleontology collections.)

Manual and Electronic Cataloging

Transition from Paper to Electronic Cataloging

Since 1989, California State Parks has gradually been converting from manual to electronic cataloging. Many State Parks with museum collections are now maintaining their collection management records on TMS, the Department's collections management database. The remaining park units are continuing to catalog manually until they are able to convert to electronic cataloging.

In this period of transition, traditional procedures for manual cataloging are described in this handbook with references made to electronic cataloging where needed

Where to Get Help with Electronic Cataloging

If you have questions relating to the procedures for cataloging on TMS, call or e-mail Museum Services Section. Museum Services is responsible for coordinating the collections management database. In addition to help over the phone, the section offers training and materials on electronic cataloging.

Manual Cataloging—Six Essential Steps

- 1) Locate copies of the two forms used to catalog museum objects manually. They are *DPR 444A Catalog Card Worksheet* and *DPR 444B Catalog Card*. (See this chapter, pages 7.14–7.22 for samples.)
- 2) Gather the information needed to complete these forms. The amount of information you include on the worksheet and catalog card will often be dictated by workload and the availability of time and staff. Take a look at the section in this chapter entitled “Levels of Cataloging” for guidance on how much information to record. As you gather information, consider the following sources:

- Accession Book.
 - Acquisition documents (e.g., *DPR 925 Deed of Gift*, *DPR 931 Objects and Specimens Found On-Site* form, purchase document, correspondence with donor, etc.).
 - Accession file.
 - Physical study of the object.
 - The source or donor.
 - Knowledgeable DPR staff.
 - Library references.
 - Appraisal and conservation documents.
 - Subject experts.
- 3) Assign a catalog number to the object and mark the catalog number on the object (See *Marking Objects*, this chapter, pages 7.27–7.46.)
 - 4) Photograph and measure the object.
 - 5) Complete and file catalog card forms *DPR 444A* and *DPR 444B*. (See the step-by-step instructions that follow.)
 - 6) Store object in assigned location.

Completion of Catalog Forms *DPR 444A* and *DPR 444B* Step-by-Step

DPR 444A Catalog Card Worksheet

Prior to typing the *DPR444B Catalog Card* in final form, catalogers often find it helpful to fill out a *DPR444A Catalog Card Worksheet* first. This form is used to compile and organize information and is usually handwritten.

To be consistent in placing information on the cards, try to use the same format for cataloging similar objects. For instance, if your park has dozens of gold pans, you would want to organize the information in the same way on each of their catalog cards.

You may wish to bracket information that you do not intend to include on the finished *DPR 444B Catalog Card*. Some details may not be necessary to include on the *444B*, but they may be worth retaining. *Catalog Card Worksheets* are filed in Object Folders (also called Catalog Folders).

DPR 444B Catalog Card

For every object cataloged, a *DPR444B Catalog Card* must be completed, unless the information is recorded electronically. This form is used to capture the basic facts about each museum object accepted into the Department's permanent collection. Such information includes name, size, color, material, maker, condition, and history, etc. The form must be typed; accuracy is essential.

DPR 444A
Catalog Card Worksheet

(FIGURE 40)

&

DPR 444B
Catalog Cards

(FIGURES 41, 42, 43 Showing minimal,
basic, and full levels of cataloging)

**Instructions for Completion of
Figure 40, *DPR444A Catalog Card Worksheet* and
Figures 41, 42, 43, *DPR 444B Catalog Cards***

Block 1. Classification

Determine the appropriate classification and record it here. The nine classifications currently used in California State Parks are listed in this chapter on pages 7.2–7.3.

Block 2. Source

Record the name and address of the donor or seller. If the object is found on site, state “found on site.” If the source is unknown, record “unknown” in this block.

Block 3. Catalog No.

Enter the three-part catalog number in this block. For a full discussion on assigning catalog numbers see this chapter, pages 7.7–7.11.

Block 4. Description and Condition

This list describes the kind of information that has been traditionally included on catalog cards in State Parks. In filling out this portion of the card, you will need to consider the amount of information you are going to record. See Levels of Cataloging, this chapter pages 7.5–7.6.

1. Object Name. (lamp, milk bottle, rocking chair, pen, carriage)
2. Old Number. (Former catalog numbers)
3. Maker (Author, artist, manufacturer)
4. Date (When made)
5. Size (Two or three measurements in metric measure)
6. Material/Color (Wood, metal, linen cloth/primary color black)
7. Identification Numbers (Serial number or series number)
8. Description (Outstanding features, designs)
9. Function (How or where object was used)
10. History (Specific information on object’s history)
11. Condition (Specific remarks noting scratches, tears, fading, missing pieces, stains; avoid terms such as excellent, good, super. Note when conservation has been done)
12. Related Objects. (References to related material – a pair of matching chairs, a set, a frame, a series)
13. References (Specific information on object in reference material)
14. Other (Information specific to object types should be included. Number of pages in a book and its subject for example)

Block 5. Date Received. Record the date that the object was acquired. Use the date on the accession document.

Block 6. How Acquired. Record the manner of acquisition. (i. e., gift, bequest, property survey, purchase, or on-site find)

Block 7. Value. When the value is known, it should be noted here.

Block 8. Determined by/Date. If a formal appraisal is done, record the name of the person and/or company making the appraisal and the date that the appraisal was made.

Block 9. Cataloger/Date. Record the first and last name of the person that cataloged the object.

Block 10. Deaccession Information/Date. This block is filled in if an object is permanently removed from the department's collection. Note the reason for removal such as theft or deaccession and the date.

Block 11. Location/Date–Unit/Location. In this block, note the location of the object along with the date it was placed there. Further changes in location should be recorded in this block as they occur.

FRONT]

1. Classification General Artifact		2. Source John & Jane Bay 1234 Bradley St. Los Angeles, CA 92313		3. Catalogue No. 794-9-3	
4. Description and Condition Name: Sugar bowl Related Object: see 794-9-4 for matching lid. Material: porcelain; body painted light blue; handles and base trimmed in gold-color paint. Maker: manufactured by Tarnison Manufacture, Tours, France. Date: 1859 Size: 10.6 cm tall, 9.5 cm diameter at base - see drawing on back. Condition: One small chip near base. History: from best set of chinaware owned by Jacque & Cherry Larue					
5. Date Received 1/5/1999	6. How Acquired gift	7. Value \$175.00	8. Determined by/Date Henry Appleby Apprs 12/20/1998	11. Location Date 2/2/2001	
9. Cataloguer/Date Mary Morris 2/6/2001		10. Disposition/Date		Unit/Location 794.7.Cab	
DPR 444A (Rev. 3/95) State of California -- The Resources Agency DEPARTMENT OF PARKS AND RECREATION CATALOGUE CARD WORKSHEET					

[Back]

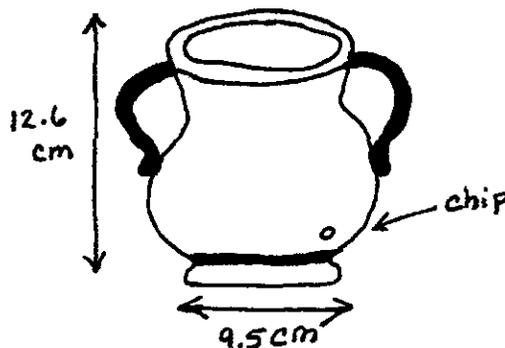


Figure 40 – Sample DPR 444A Catalog Card Worksheet

1. Classification		2. Source		3. Catalogue No. 794-9-3	
4. Description and Condition sugar bowl					
5. Date Received	6. How Acquired	7. Value	8. Determined by/Date	11. Location Date	Unit/Location
				2/2/2000	794.7 cab4
9. Cataloguer/Date Mary Morris 2/2/2000		10. Deaccession Information/Date			
State of California – The Resources Agency DEPARTMENT OF PARKS AND RECREATION					
DPR 444 B (Rev. 10/88)		CATALOGUE CARD		96 87282	

**Figure 41 – DPR 444B Catalog Card
Completed at the Minimal Level**

1. Classification General Artifact		2. Source John and Jane Bay 1234 Bradley Street Los Angeles, CA 92313		3. Catalogue No. 794-9-3	
4. Description and Condition <u>Name:</u> sugar bowl <u>Related object:</u> See 794-9-4 for matching lid. <u>Material:</u> bone china; body painted light blue; handles and base trimmed in gold-color paint. <u>Maker:</u> manufactured by Taxiscon Manufacture, Tours, France in 1859. <u>Size:</u> 12.6 cm high, 9.5 cm diameter at base. <u>Condition:</u> one small chip near base. <u>Remarks:</u> sugar bowl was part of a chinaware set used by Jacques and Cherry LaRue at Fabled Farm					
5. Date Received 1/5/1999	6. How Acquired Gift	7. Value \$175.00	8. Determined by/Date Henry Appleby Appraisers	11. Location Date Unit/Location 2/2/2000 794.7 Cab4	
9. Cataloguer/Date Mary Morris 2/2/2000		10. Deaccession Information/Date			
State of California – The Resources Agency DEPARTMENT OF PARKS AND RECREATION					
DPR 444 B (Rev. 10/88)		CATALOGUE CARD		35 67262	

**Figure 42 – DPR 444B Catalog Card
Completed at the Basic Level**

1. Classification General Artifact		2. Source John and Jane Bay 1234 Bradley Street Los Angeles, CA 92313		3. Catalogue No. 794-9-3	
4. Description and Condition <u>Name:</u> sugar bowl <u>Related object:</u> See 794-9-4 for matching lid. <u>Material:</u> bone china; body painted light blue; handles and base trimmed in gold-color paint. <u>Maker:</u> manufactured by Tariscon Manufacture, Tours, France in 1859. <u>Size:</u> 12.6 cm high, 9.5 cm diameter at base. <u>Condition:</u> one small chip near base. <u>Remarks:</u> sugar bowl belonged to Jacques and Cherry LaRue who owned Fabled Farm from 1852-1882. They both emigrated from France. Cherry's aunt Matilee Longet, who lived in Descartes, France, gave the couple 24 place-settings of fine bone china in 1862, which included this sugar bowl. Distinguished guests such as Brete Hart, Adolph Sutro and W. T. Sherman are known to have been served on these dishes.					
5. Date Received	6. How Acquired	7. Value	8. Determined by/Date	11. Location	
1/5/1999	Gift	\$175.00	Henry Appleby Appraisers 12/20/1998	Date	Unit/Location
9. Cataloguer/Date			10. Deaccession Information/Date		2/2/2000 794.7 Cab4
Mary Morris 2/2/2000					
State of California – The Resources Agency DEPARTMENT OF PARKS AND RECREATION					
DPR 444 B (Rev. 10/88)		CATALOGUE CARD		95 87292	

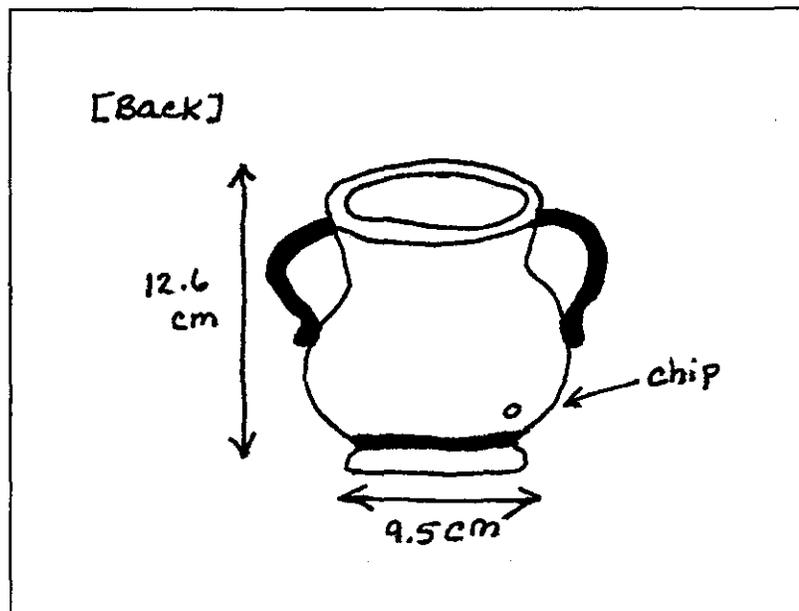


Figure 43 – DPR 444B Catalog Card Completed at the Full Level

Distribution of *DPR444B Catalog Cards*

White Copy – This is the top sheet of the form with original typing on it. It remains with the park that accessioned the object. It is filed numerically with other white copies in your park's registration records.

Pink Copy – Send this copy to Statewide Museum Collections Records in Sacramento for filing.

Buff Copy – File this copy numerically with other buff catalog cards. The buffs are typically grouped alphabetically by subject (i.e., ethnographic, documentary, vehicle, etc.) The buff copy accompanies the object if it is transferred to other locations within the Department.

Object Folders (also called catalog folders)

An accession may consist of one, a few, or hundreds of objects. Some objects, because of their historical or interpretive significance, may merit their own object folder. An object folder should be labeled with the object's catalog number and object name. Example:

794-27-10 birdcage

Remember that information relating to the accession as a whole remains in the accession folder. Information that pertains only to the object goes in the object folder. Such information may include the following:

- 1) Correspondence specifically related to the object.
- 2) Research material relating to the object, including oral histories, newspaper clippings, field notes, and working notes.
- 3) Photographs and negatives taken for identification purposes.

If your park unit is using TMS, make an entry in the artifact's object record to record the existence and location of the photograph.

- 4) Condition reports, conservation proposals, conservation treatment reports. (You may need to place a notation in the file if the report must be filed elsewhere due to its size.)
- 5) DPR 444A Catalog Card Worksheet after the DPR 444B Catalog Card has been typed.

If you have a series of related objects — a set of china, bowling pins, a carpenter's tool case — it is often more practical to create one object folder for the series of objects than to create folders for each of them.

File object folders sequentially by catalog number behind the accession folder.

Electronic Cataloging—Six Essential Steps

- 1) Determine the amount of information you will be able to enter given the workload and availability of time and staff. For guidance on how much information to record, take a look at the section in this chapter entitled “Levels of Cataloging,” pages 7.5–7.6
- 2) Gather the information needed to complete the fields in the object screen. Consider the following sources:
 - Accession Book.
 - Acquisition documents (e.g., *DPR 925 Deed of Gift*, *DPR 931 Objects and Specimens Found On-Site* form, purchase document, correspondence with donor, etc.).
 - Accession file.
 - Physical study of the object.
 - The source or donor.
 - Knowledgeable DPR staff members.
 - Library references.
 - Appraisal and conservation documents.
 - Subject experts.
- 3) Assign a catalog number to the object and mark the catalog number on the object (See Marking Objects, this chapter, pages 7.27–7.45.)
- 4) Photograph the object for identification purposes.
- 5) Measure the object.
- 6) Store object in its assigned location.

Photographing Objects for Identification

Ideally, each object accessioned should be photographed as an integral part of its documentation. A photograph should include the date of the photograph, a scale (e.g., a ruler or similar device), the catalog number and a gray scale or color scale. Detail shots should be included to show particular characteristics such as inscription, markings, and any damage or repairs. Three-dimensional objects should be photographed to show different views (e.g., rear view and sides). Depending on the nature of the object being photographed and the purpose of its photograph, it may be appropriate to shoot a group of objects together.

Photographs of collection items are useful for the following purposes:

- Identification
- Condition recording
- Insurance claims
- Study or research
- Education
- Exhibition planning
- Publication
- Publicity
- Object retrieval
- Proving ownership
- Theft recovery

Whether to shoot in black and white or color – or both depends on the purpose of the photograph. If you are planning to take on a large photography project to document your collection, you should consult the Photo Archives and/or Museum Services Section staff to ensure that the medium you choose is cost-effective and compatible with statewide documentation projects.

If necessary, a detailed drawing may be substituted for a photograph.

Marking Catalog Numbers On Objects

Basic Principles

Each object in the Department's permanent collection has its own individual catalog number which should be affixed to the object. Marking a catalog number on an object makes it possible to identify the object, account for it within a larger collection, and link it to its paper records. There are a number of basic principles to follow when marking objects:

- Catalog numbers should not detract from the appearance of objects or diminish their historic or intrinsic value.
- Catalog numbers should not interfere with the study or display of objects.
- Numbers should be applied in such a way that they are easily found yet unobtrusive.
- To avoid unnecessary handling, catalog numbers should be applied in standard locations on objects of the same type.
- Numbers should be durable.
- They should be legible.
- Materials and methods should be used that will allow numbering to be reversed, meaning that the numbering can be removed without damage to objects.
- Numbers should be applied where they will not be worn off from friction or handling.
- The size of numbers should be proportionate to the size of the objects they are applied to.

In short, when marking objects the essential ideas to remember are that numbers must be easily found, clearly legible, and must not alter the object or interfere with study or display. They should be placed in the same location on similar types of objects, and the methods used to apply numbers must be reversible. See the section on Standard Locations of Catalog Numbers, page 7.40–7.43 this chapter, for guidance on where to place catalog numbers on different types of objects.

Avoiding Loss or Damage—Things Not to Do

Techniques and materials used for marking objects have evolved over time. The following list draws upon lessons from the past. It lists methods that should not be used when marking objects.

- Never do anything to a museum object that cannot be undone.
- Do not remove an old number as it may relate to an earlier registration system.
- Do not write a number directly on a loaned object unless permission has been obtained from the owner. Usually, a number can be written on a tag and attached to the object.
- Do not use pressure-sensitive tape or labels on museum objects (e.g., scotch tape, magic tape, DYMO labels, adhesive tape, or masking tape).
- Do not use gummed labels, gummed tape, or gummed paper on museum objects.
- Never experiment on an artifact or specimen. To become familiar with a technique, try it out on a similar surface before applying it to the museum object itself.
- Do not use glue, paste, cement, or epoxy on objects.
- Do not use staples, paper clips, straight pins, or wire to affix numbers or information to objects.
- Do not write on an object or specimen with a ballpoint pen, crayon, felt marking pen, or grease pencil.
- Do not use paint or ink on paper objects or documentary materials.

- Do not use inked stamps to imprint numbers or information on objects.
- Never mark on the front or back of an oil painting canvas.
- Never affix catalog numbers on coins.
- Do not affix a catalog number to the underside of a heavy object or back of heavy furniture.
- Do not use Whiteout, fingernail polish, lacquer, etc. to substitute for prescribed cataloging materials or equipment.

Setting Up the Work Area

Under the best conditions, you will have available to you a room or space designated for museum collection work. But if you must work in less than ideal circumstances, for example in an unlighted building or in an outdoor storage yard, these are steps you can take to prepare your work area:

- Look for a place that is well lighted, properly ventilated for working with cataloging materials, and undisturbed by other park staff or activities.
- Set up a clean working surface.
- Do not allow food, beverages, or smoking around objects.
- Make sure supplies such as ink or PVA are placed where they will not spill on the objects.
- Use pencils in lieu of ballpoint or other types of pens for making notes to avoid even inadvertently transferring ink to objects.
- Organize your marking project by object types or shelves to limit and keep track of the items with which you will be working.
- Ensure that equipment and objects are secure from theft and other hazards.

Protecting Your Clothing and Yourself

Basic Measures

The following are basic precautions to take when marking artifacts:

- Wear a smock or lab coat to protect your clothing from soil and to protect objects from catching on buttons or jewelry.
- Wear nitrile or latex gloves to protect your hands from potentially harmful substances on objects such as solvents, pesticides, and preservatives. In turn, wearing gloves protects objects from exposure to the natural acids and salts on your hands.
- Wear a dust mask:

If the area you are working in is exceptionally dusty or moldy.

If you are handling feathers, mounted animals, baskets or other items that may have been treated with arsenic.

If you will be exposed to the dusts or pollens found on archaeological materials.

If there are rodent droppings present.

If the artifacts you are handling have flaking or powdery paint, especially if the paint is likely to contain lead.

- Use a respirator and eye protection or a fume hood when you are working with substances or artifacts that emit hazardous fumes. Such precautions should be taken, for example, when working for extended periods of time with solvents, nitrate negatives, old newspapers, decomposing celluloid, or fumigated objects. Materials Safety Data Sheets (MSDS) should be posted or available on file for hazardous substances. (See the section in this chapter on Material Safety Data Sheets, page 7.39–7.40.)
- To protect your back, do not bend over to pick up heavy objects. Do not pick up heavy objects at an angle. Get as close to an object as possible before picking it up. As you lift the object, bend your knees and let your legs bear most of the weight. Use a back brace when needed. Do not hesitate to get help to lift or move heavy objects.

- Plan ahead before moving an object. Decide the route you will take and where you will set the object. Ask for help if you need it. Check the route for hazards. Be aware of both the space and conditions around you. Danger is increased by low ceilings, narrow doorways, changes in floor surfaces, projections from exhibits or walls, as well as by low light levels.

When Handling an Object Presents a Health Risk

Do not handle an object if you suspect that it presents a personal health risk.

Before you proceed, ask for advice from the park or district curator on the precautions, safety equipment, or handling methods you should use. If help is unavailable locally, you can ask for recommendations from curators at the Northern Service Center or the Museum Services Section of Cultural Resources Division. For additional information on health and safety practices see Chapter 2 The Work Environment in this manual.

Techniques for Marking Objects

Three methods of marking objects are outlined in this section. They cover objects made of hard smooth materials, made of fabric, and made of paper. All three methods share in common the basic principles that catalog numbers should be placed and applied so that they are durable, legible, unobtrusive, and reversible.

Numbering with Barrier Coats and Inks

The following method is best used for objects with smooth, hard, nonporous surfaces such as wood, porcelain, glass, or metal. Examples of such objects might include carriages, flatware, dolls, furniture, and guns.

1. Be sure the area you are marking is clean and free from dust.
2. Apply a rectangular strip—a clear basecoat or clear barrier coat—using an artist's brush or a brush attached to the lid of a .5/14 ml ounce bottle. The size of the strip should be in proportion to the size of the object.
3. Allow the basecoat or barrier coat to dry.
4. Select a basecoat that will contrast with the color of the object. If you are using a clear basecoat, select an ink that will contrast with the color of the object.

For instance, if the object is dark in color, you may wish to apply a strip of titanium white over the clear basecoat and then write in black ink on the titanium white. Alternatively, you may wish to apply the lettering directly on the basecoat in white ink.

5. Allow the whitecoat or ink to dry.
6. Write the number on the basecoat or whitecoat using a Rapidograph drafting pen or India ink and a Crow Quill pen or Micron pen (whatever ink works best with the base or whitecoat).
7. Allow the ink to dry.
8. Apply a clear topcoat and allow the topcoat to dry thoroughly. (Note: PVA can be used as a bottom coat, topcoat, or sealant.)

It is important that the basecoats, topcoats, inks, and solvents used for marking will not damage the objects you are numbering. If you are in doubt about how a particular chemical will react with an object, try it out on a similar surface first and/or seek the advice of a conservator. It is also important that all marking is reversible.

Numbering Textiles

This method may be used for clothing, linens, rugs, tapestries, costumes, draperies, and other objects made of cloth or soft leather.

1. Cut a small piece of twill tape or polyester ribbon.
2. Print the catalog number on the cut tape with a permanent laundry marker. It is important to use ink that will not fade in ultraviolet light or bleed if the fabric gets damp. Name Maker Laundry Pen™ is a brand used widely by State Parks curatorial staff.
3. Stitch the tape to the article in the proper location. For guidance on where to place a tape label, see the section on Standard Locations of Catalog Numbers. The basting stitch is recommended for securing the label to the object.
4. If a textile is fragile or lacy, you must use your judgment about the best method to employ. It may be possible to write a number on an acid-free tag and secure it to the object. If the object is so fragile that either sewing a tape label on it or looping a paper tag on it, could cause it to tear, then it may be best to mark the number on the container holding the object rather than mark the object itself.
5. This is an alternative method if you do not have a laundry marker in your catalog kit. Apply a strip of PVA (polyvinyl acetate) to cloth tape and allow it to dry. Write the catalog number on the strip using a Rapidograph or other cataloging pen. Cover the writing with a topcoat of PVA and after it has dried, baste label to textile.

Numbering Paper Objects and Photographs

The technique described here is used for artifacts made of paper, including books, ledgers, albums, prints, maps, photographs, certificates, etc.

1. Print the number directly on the document with a No. 1 pencil.
2. Make sure the point is not too sharp and apply pressure lightly. Bearing down too hard will leave an impression on the paper.
3. Never use ink or indelible pencil on paper or photographs, as these media are not reversible.

Removing Numbers

Do not remove an old number. It should be left in place, as it may be a clue to an object's history, previous owners, and/or documentation. While a basic principle in marking objects is that the number be applied in a medium that is reversible, it is rarely necessary to remove a number. Most often numbers are removed when mistakes are made in applying them, namely the number is incorrect, the ink smears, or the basecoat fails to dry on a particular material.

When it is necessary to take off a number, use a cotton swab dipped in a small amount of solvent so that the dissolved material is carried into the swab rather than diluted and absorbed into the object. For information on matching solvents with base and topcoats, refer to the section on Materials and Tools for Marking Objects.

Materials and Tools for Marking Objects

Cataloging tools and materials are always evolving. New products come on the market, and staff gains new ideas and techniques, as they acquire more experience and training. The items listed here are recommended, but not mandatory. They have been selected for inclusion in this list because they have been used successfully by California State Parks' staff over time. In addition, they are easily obtainable from hardware stores and companies that sell office, art, or archival supplies either directly or through catalogs.

If you learn about and use a medium or implement that works well for you, you should call or write the Museum Services Section of Cultural Resources Division for possible future inclusion in updates to this section.

1) Pencils and Erasers

No. 1 Lead Pencils are recommended for marking paper objects, as these soft-leaded pencils are less likely to make a deep impression.

Staedtler Mars Plastic Eraser removes pencil marks cleanly without abrasion. Can be used on all types of paper, including drawing or tracing papers, and drafting films. It does not smudge, smear, or mar the working surface.

ArtGum® is used for paper, fabrics, and leather. Erases and cleans surface without scratching or smudging.

2) Pens, Markers, and Inks

Pens

Pens used for marking catalog numbers on objects must be suitable for writing on a barrier coat and not smear when covered by a topcoat. They are never used to write directly on an object. The ink in the pen should be acid free, permanent, quick drying, waterproof, and should not discolor or fade when exposed to light. The following are recommended types and sizes of cataloging pens:

Koh-I-Noor® Rapidograph® is a refillable technical pen that can be filled with white or black permanent ink. The .30 or .50 are recommended sizes.

Micron Pigma Pens are usually only available in black. The .03 size is preferred.

Sanford® Sharpie® - permanent ink pens in a variety of sizes.

Crow Quill pens and nibs. One advantage of this type of pen is that nibs in various sizes can be used interchangeably. Black India ink or white ink can be purchased in art supply stores. #12 is a standard size for cataloging.

Name Maker Laundry Marker is a brand of laundry marker that has been used widely in State Parks. It is a non-refillable, permanent ink marker used to write numbers directly on polyester ribbon or cotton twill tape to create textile labels. Caution should be taken to allow the ink to dry several hours or overnight before attaching the label to the object. It is manufactured by Name Maker, Inc. and can usually be purchased from fabric stores.

Inks

Inks for writing catalog numbers should be acid free, permanent, quick drying, waterproof, and should not discolor or fade when exposed to light. Permanent black India ink or white ink such as Koh-I-Noor® or Pelican can be used to fill the Rapidograph® pens or used with Crow Quill pens for marking objects.

3) Barrier Coats and Top Coats

PVA (polyvinyl acetate) serves as both a barrier and a topcoat. California State Parks' museum staff has used it for many years with good results. It can be purchased premixed or made by mixing of polyvinyl chloride (PVC) beads and acetone. Changing the proportion of beads to acetone makes it possible to adjust thickness according to surface type. PVA is reversible with acetone or by reapplying a small amount of PVA and then wiping the surface clean. Material Safety Data Sheet (MSDS) required.

PVA Varnish serves as both barrier and topcoat. It is available in a pre-mixed solution or it can be made by dissolving PVC beads in alcohol. PVA Varnish reverses in denatured alcohol. PVA Varnish tends to soak into porous materials and should not be used on unfinished wood, ivory, or bone. It is flammable and must be used in a well-ventilated area. Can be purchased from conservation suppliers. MSDS required.

Fluid Acrylic provides a white barrier coat for numbering dark objects. A recommended brand is Golden Fluid Acrylic "Titanium White". It is suggested as an alternative to white Liquitex when a white background is needed. It is sold premixed. Reverses with denatured alcohol or acetone. One caution: do not use on porous materials such as unfinished wood, ivory, or bone unless a protective coat of another barrier material is applied first. Available from art supply stores.

Acrylic gloss provides an alternative topcoat when PVA or PVA Varnish is used as a bottom coat. It is reversible, when dry, with ethyl alcohol or acetone. Golden Medium is a recommended brand. MSDS required.

Liquitex (acrylic polymer emulsion) is most often used as a white barrier coat for numbering dark objects. It is sold in tubes or jars in black and white. Reverses with acetone.

4) Solvents

Acetone may be mixed with PVC (polyvinyl chloride beads) to form PVA. May be used to reverse PVA, fluid acrylic, acrylic gloss, and Liquitex. The two grades of acetone recommended for collections work are in order of preference: 1) Chemically pure - the purest and most expensive grade; 2) Reagent grade, also called "industrial," or "technical" grade. It is better to purchase acetone from a chemical or conservation supply company where you can get a purer grade of the solvent than you can from a hardware store.

Acetone reacts with many substances and should not be used on plastic, nylon, and some wood finishes, such as lacquer and varnish.

Denatured Alcohol (also called ethyl alcohol and ethanol) is used as a solvent for PVA varnish, fluid acrylic, and acrylic gloss. May be purchased from a hardware store or a chemical supply store.

5) Cloth Tapes and Thread

Polyester twill tape, 100% cotton twill tape, or silk tape. Catalog numbers may be written directly on these cloth tapes to create labels that can be stitched onto fabric objects.

Polyester Ribbon is suggested as an alternative to cotton twill tape when the object to be labeled is a lightweight textile. Can write catalog number directly on ribbon.

Polyester, 100 % Cotton, or Silk Thread. Any of these types of threads is suitable for sewing cloth tape labels onto fabric objects.

These items may be purchased from fabric or craft supply stores. Natural color is preferred for both tapes and thread, and tapes should be without sizing.

6) Paper Tags

Paper Tags can be used to attach catalog numbers to objects when numbers cannot be applied directly. Tags should be in proportion to the size of objects they label. Sizes range from tiny jewelry tags to large shipping tags that are attached with string or thread. Paper tags should be acid-free and lignin-free with strong strings for attachment.

Avoid colored strings that may "bleed" when wet and wire fasteners that may rust and cause corrosion at the point of contact.

Tyvek™, made of polyethylene olefin fibers, comes in sheets. It can be marked with pencil, pen, typewriter, or embossed. Its many uses include washable labels for textiles and shelf lining.

Paper labels with adhesive backs may be used to label the outside of containers holding objects.

7) Plastic Baggies and Containers

Clear plastic bags or boxes can be used to store small or fragile objects. Use polypropylene or polyethylene containers and bags. Do not use containers and bags made from polyvinyl chloride.

8) Cleaning Materials

Brushes. Natural bristle brushes are preferred for cleaning objects. The size of the brush should be in proportion to the size of the object. Less expensive brushes with synthetic bristles are useful for cleaning storage areas such as shelves and drawers.

Cotton cloth is recommended for dusting instead of feather dusters that tend to redistribute dirt and catch on things. Fabric should be soft and close woven so that it will not catch on objects. Diapers make good dusting cloths.

Distilled Water lightly sprayed on cotton cloth can be used to gently wipe off dirt on most museum objects. Purchase distilled water from grocery or hardware store.

Screens for vacuuming textiles.

Steel Wool 0000 grade- extra fine is a useful tool for cleaning rust and dirt from metal objects, so basecoats for cataloging will adhere.

Vacuum Cleaners. Vacuum cleaners with HEPA (High Efficiency Particulate Air) filters are capable of capturing more minute particles than other types of vacuums.

9) Measuring Equipment

Cloth Tape Measures are adequate for measuring most objects. They may be marked in either inches or centimeters.

Metal Retractable Tape Measures with metric markings may be necessary for measuring very large objects or for measuring spaces. Care should be taken not to scratch objects with metal tape measures.

The Catalog Kit

A catalog kit is a means of keeping together all the materials and equipment needed to mark catalog numbers on objects. These items are typically stored in a box or container that can be easily carried to any space where there are objects. The materials you include in a catalog kit depend on the nature of the collection. The equipment and supplies are listed here in alphabetical order. For an expanded discussion of the items in this suggested Catalog Kit see the section that follows, "Materials and Tools for Marking Objects."

Acetone (MSDS required). Chemically pure grade recommended.

Acrylic gloss (MSDS required). Used to create a clear topcoat.

Ammonia (MSDS required). For cleaning pen nibs.

Bottles, 1 oz., glass. Several, all with tight screw caps; some with brushes attached to lids.

Brushes. A sample set:

- Sable bristle flat paint brush - No. 4
- Sable bristle oval artist brush - No. 000
- Sable bristle oval artist brush - No. 2
- Sable bristle oval paint brush - No. 3

Caliper (optional)

Cloth tape - cotton, polyester, or silk

Cotton swabs on wooden sticks

Dust mask (air filter type)

Eraser(s), vinyl

Ethyl alcohol (also called denatured alcohol and ethanol) (MSDS required)

Flashlight

Fluid acrylic (A recommended brand is Golden fluid acrylic "Titanium White")

Gloves — cotton, latex, and/or nitrile

Ink — white or black "drawing" ink and/or black India ink.

Laundry Marker (Name Maker Laundry Marker recommended)

Liquitex — acrylic polymer emulsion

Magnifying glass

Needles, embroidery: a variety of sizes for use on different types of fabric

Needle threader

Pencils #1 or #2 lead

Pencil sharpener

Pens: a sample set:

- Crow Quill pens and nibs, #12
- Size #30 Koh-I-Noor® Rapidograph® pen
- Micron Pigma Pen

Plastic containers. Small, clear plastic polypropylene or polyethylene boxes or vials.

PVA beads (polyvinyl acetate) (MSDS required)

PVA Varnish (This product comes premixed, or it can be made by mixing PVC beads and alcohol (MSDS required)

PVC (polyvinyl chloride beads)(MSDS required)

Rags — small, clean, cotton

Ribbon, polyester

Ruler

Scissors

Smock or lab coat

Steel wool (0000 grade-extra fine)

String for tying on labels

Tags, acid-free paper in various sizes

Tape measures (2):

- Cloth tape measure marked in centimeters and/or inches.
- Metal, retractable tape measure marked in centimeters and/or inches.

Thimble

Thread — polyester, cotton, or silk, one spool each of black and white

Threader

Tyvek™

Ziploc bags — small, medium, large (without powder coating inside)

Material Safety Data Sheets (MSDS)

“MSDS required” is noted in parentheses beside some items listed in The Catalog Kit, items that may be hazardous if not handled properly.

Manufacturers or vendors are required to furnish an MSDS automatically upon purchase. MSDS include the substance's chemical ingredients by name; possible symptoms of overexposure and effects on health; emergency phone numbers; emergency treatment procedures; spill or leak procedures; safety handling procedures; and guidelines for personal protective equipment.

You will find a sample Material Safety Data Sheet in Chapter 2 The Work Environment on pages 2.37–2.44. Be aware that these are samples. You will need to obtain your own sheets for these substances directly from the vendor or manufacturer, since the products themselves may vary from manufacturer to manufacturer.

For additional information refer to DAM, Chapter 1200 Employee Safety, Sections 1240.4 and 1240.5. Park unit Maintenance Chiefs or HAZMAT (Hazardous Materials) Coordinators may also be able to provide information.

Standard Locations for Catalog Numbers

As a rule, catalog numbers are placed in the same location on objects of the same type. This practice makes it easier to find numbers and reduces the need for handling objects. Standard locations for numbering specific types of museum objects are

Type of Object	Location of Number
Albums, scrapbooks	On lower right corner of the inside front cover near the spine. Remember there may be items in the album or scrapbook (photographs, letters, postcards, etc.) that need to be cataloged and marked individually according to object type and material
Armor	On inside of each element.
Basketry	On the outside base of the basket. But do not place on the center or start of the basket.
Beads	Beads from a single collection may be placed in a small, clear glass or plastic container that is numbered appropriately. Beads may also be placed in a plastic Ziploc bag with the number written on a stringed acid-free tag. (The string allows the tag to be suspended in the bag in such a way that it is visible and won't be lost in the beads.)
Blades, daggers, knives, scabbards, swords, other cutting implements	On the reverse side of the blade just below the counter guard or at the base of the butt on the handle.

Bone, ivory	Proceed according to type of object in an inconspicuous location. Use caution. Bone and ivory are not only porous but can exhibit capillary action when some substances are coated on them.
Books, diaries, ledgers, manuscripts, magazines, newspapers, sheet music	Inside front cover on lower right corner near spine. Loose pages should be numbered individually with the same catalog number.
Buttons	A single large button may be numbered on its reverse side. If the button is small, subject to damage from numbering directly on it, or if it is in a set of two or more, they may be placed in a labeled clear glass or plastic container. A set of buttons may also be placed in plastic Ziploc bags with the numbers written on stringed, acid-free tags.
Ceramics, including earthenware, porcelain, stoneware; pottery, glass, chinaware	On underside or at the base of the object depending on size, shape, and, in the case of glass, transparency. The number should not obscure any maker's marks or inscriptions. Unglazed pottery may be porous and require thick consistency in the basecoat.
Clothing, costumes	For shirts, dresses, jackets, and vests, affix a numbered cloth tape to the inside of the neckband; place at the rear, just right of center. For skirts and trousers, the tape should be attached at mid-back on waistband.
Coins	Do not affix a catalog number to the coin itself. Mark number on container holding the coin, or place in a Ziploc bag with the number written on a stringed, acid-free tag.
Dolls	On back of neck below costume or on bottom of foot.

Furniture	On inside top of right rear leg near seat. For pieces without legs, on right side near base, as is most convenient. Heavy objects are numbered on the right leg or right side at the base. Objects that are square or rectangular without an apparent front side, should be numbered on the least likely side to show when the piece is exhibited.
Guns, including, pistols, revolvers, rifles, shotguns	On lower right corner of the butt.
Jewelry	On right lower corner of object on the reverse side. On a necklace or bracelet, the number may be affixed to a cloth tape and sewn to form a loose ring with the necklace inside.
Letters	On lower right corner on the reverse side of the envelope and in the same position on the reverse side of each page of the letter itself.
Machinery	On the right lower rear of the object and in close proximity to a manufacturer's plate if practical.
Paintings (on canvas)	On the bottom right-hand corner on the reverse side of the stretcher. The frame should receive a separate catalog number in the same corner as on the painting. Scroll paintings are numbered on the knob.
Photographs	On lower right corner of the reverse side.
Postcards	On lower right corner of the address side.
Prints, watercolors, broadsides, posters, maps, charts, certificates, receipts, business cards	On lower right corner of reverse side.
Sculpture, statues	On underside or at the base of the reverse side of the object depending on its size and shape.
Textiles, including blankets, drapes, rugs, table cloths, tapestries	Attach numbered, fabric tape tags to reverse side of the article at opposite corners. By affixing numbers at opposite corners, the numbers can be easily located when textile is rolled or when on exhibit, without excessive handling.

Vehicles, including automobiles, buggies, carriages, tractors, wagons	On right side on the rear axle, or affix number to the lower right rear corner of the body. If a manufacturer's plate is present, place catalog number in close proximity to it. If the number may be difficult to locate later due to the size of the vehicle, the location of the number should be noted on the catalog card or entered into the TMS object record.
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Placing Catalog Numbers in Unusual Locations

If you must place a number in an unusual position due to the object's shape, size, or other irregularities, you should note the location on the back of the catalog card (DPR 444B) and enter a notation in the object record on TMS, the Department's electronic registration system.

Locating and Marking Catalog Numbers on Large Objects

If the object falls into one of the categories in the section on Standard Locations for Catalog Numbers, follow the guidelines for that particular type of object. In some instances, larger pieces of equipment, such as donkey engines, ore carts, arrastras, automobiles, wagons, etc. have manufacturer's plates or labels. If possible, locate the catalog number close to this plate in an inconspicuous place. If neither of these options will work for you, then exercise your best judgment about where to place the catalog number.

To aid in finding the number at a later time, note the location on the back of the object's catalog card and enter a notation in the object record on TMS, the Department's electronic registration system.

One way to make the numbering big enough to be seen on a large object is to write the number using Liquitex and a brush and then seal the number with a topcoat of PVA.

Marking Very Small Objects

If an object is too small to number directly, place it in a vial, small box, Ziploc bag, or acid-free envelope, and label the container.

Numbering Fragments, Parts, Pairs, and Sets

Numbering Pairs or Sets Assigned a Single Catalog Number

If the components are large enough, mark the catalog number on each item in the pair (shoes, gloves, skis) or set (game pieces, drill bits, horseshoes). Otherwise mark the catalog number on the container holding the objects.

Numbering Broken Pieces of a Single Object

If an object is broken and the pieces are large enough, the catalog number should be written on each of the pieces. An example is a china plate that has been dropped and is now in three pieces.

If the fragments are too small to number individually, place them in a Ziploc bag, archival-quality box, or vial and label the container.

If some of the pieces are large enough to number, mark them, then place all the pieces in a container and mark the container.

Numbering a Group of Objects

When a group of objects has been assigned a single catalog number, place the catalog number on the container. Examples of groups of objects are a sewing box with a variety of small objects in it — pins, needles, buttons, hooks and eyes; a workroom box filled with nails of various size; a small bag filled with marbles; archaeological items such as flakes, glass, or ceramic shards.

Where to Go for Help

Uncertain about the best method to use for marking leather? Need suggestions on where to buy supplies for a catalog kit? Want a recommendation about how to number an unusual object? Listed below are sources that you can go to for help with these and other curatorial questions.

- The park or district curator.
- The curator at the Northern Service Center.
- The curatorial and archival staff in Museum Services Section.
- Staff in charge of similar collections in other State Parks.
- Other museums.
- A private conservator.
- Conservation products vendors.

Cataloging Checklist

You may find the following checklist helpful when cataloging objects in your park unit's collection:

Manual Cataloging

- Prepare the work area so that it is as clean, well lighted, well ventilated, and as free from disturbances as possible.
- Assemble cataloging supplies and tools — forms, pencils, pens, tape measures, gloves, smocks, camera, brushes, plastic baggies, cloth and paper tags, etc.
- Determine the amount of information you will be able to record given the workload and availability of time and staff. For guidance, refer to Chapter 7, Levels of Cataloging, pages 7.5–7.6.
- Gather information needed to catalog each object from sources such as the accession file, accession book, donors, park personnel, reference books, etc.
- Clean objects, if they require it, using the appropriate technique for their type and condition.
- Complete a *DPR 444A Worksheet*, if needed. When cataloging many objects of the same type — rocks, projectile points, baskets, dinnerware, etc. — use worksheets to create formats for them.
- Assign a catalog number to each object.
- Mark assigned catalog number on each object using the appropriate technique for its type and condition.
- Measure the object(s) using a metric tape measure.
- Photograph each object with scale for identification purposes.
- Store or place objects on exhibit according to the location indicated on their catalog cards.
- Prepare a *DPR 444B Catalog Card*. File and Distribute Copies.

- Create catalog folders for those objects that have special historical or interpretive significance and file *Catalog Card Worksheet (DPR 444A)*, as well as other research materials in them.

Electronic Cataloging

- Prepare the work area so that it is as clean, well lighted, well ventilated, and free from disturbances as possible. Make sure you have a power outlet nearby.
- Assemble the cataloging supplies and tools — forms, pencils, pens, tape measures, gloves, smocks, camera, brushes, plastic baggies, cloth and paper tags, etc. Be certain you have extra batteries if using a laptop.
- Determine the amount of information you will be able to enter given the workload and availability of time and staff. For guidance, refer to Chapter 7, *Levels of Cataloging*, page 7.5–7.6.
- Gather information needed to catalog each object from sources such as the accession file, accession book, donors, park personnel, reference books, etc.
- Clean objects, if they require it, using the appropriate technique for their type and condition.
- Optional: Use a worksheet to organize information before entering it into TMS. You may wish to contact Museum Services Section to obtain a copy of an “unofficial” worksheet the section has created for cataloging in TMS.
- Assign an object (catalog) number to each item.
- Measure the object(s) using a metric tape measure.
- Fill in the appropriate data entry screens.
- Mark object (catalog) number on each object using the appropriate technique for its type and condition.
- Photograph each object with scale for identification purposes.
- Store object(s) or place them on exhibit according to the location indicated in the Location field.
- Create object (catalog) folders for those objects that have special historical or interpretive significance and place research materials in them.

CONDITION REPORTS, APPRAISALS, & INVENTORIES

Chapter 8 provides guidance in these three important aspects of collections management.

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CHAPTER 8

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Condition Reports

What Is a Condition Report?

A condition report (also known as “condition notes”) is an assessment of an object’s physical state at a given moment in time. Condition reports can be done in a variety of formats including text (checklist or narrative formats), photographs (annotated to document condition problems), sketches, videotapes or computer images. They often include a combination of these. To be useful, a condition report must be accurate and understandable.

When Is a Condition Report Needed?

Condition reports should be completed under the following circumstances:

- When an object enters a unit’s custody for consideration as a gift, on loan, or upon accession. A condition report prepared at these times provides a benchmark against which future examinations can be compared.
- When preparing an object for exhibition.
- When removing an object from display.
- When preparing an object for loan.
- When receiving an object upon return from a loan.
- When objects are released for conservation treatment.
- When there has been a disaster (i.e., fire, earthquake, flood, etc.).
- When monitoring the status of a particularly fragile object.
- When helping collection managers make informed decisions relating to storage, exhibition methods, transportation, and handling.

Who Prepares Condition Reports?

Curators are normally responsible for preparing condition reports, or may assign the task to a museum technician. Occasionally, there is a need to contract with a conservator to obtain a condition report. A conservator's report is more technical and more detailed and is usually used to plan and prioritize treatment proposals. If you need assistance locating a conservator or preparing a contract to have a conservator do a condition report, contact Museum Services Section.

Essential Components of a Condition Report

At a minimum, a condition report should be a concise overall assessment of the object's physical condition (i.e., poor, fair, stable, excellent), including any obvious defects (i.e., tears, stains, missing pieces). The location of the defect should be clearly noted (e.g., stain in middle of map, chip at base of bowl). The report should also include any identifying numbers (accession, loan, field, catalog). A more thorough report should include the following information as well:

- A description of the object, including the materials it is made of
- The object's dimensions
- Type of damage
- Extent of damage
- Location of damage
- Previous repairs
- Dates of and/or reason for damage, if known
- Examiner's name
- Date of examination
- Recommendations

Sample Condition Reports

Condition reports vary greatly in format depending on the purpose and the nature of the object. DPR does not have an official condition report form. The following four sample condition reports were designed to meet specific needs (see Figures 44, 45, 46, 47). You may find the information requested in these forms helpful when you must do condition reports under similar circumstances.

SAMPLE CONDITION REPORT

free text format

This condition report is reprinted here courtesy of the Museum Management Program, National Park Service.

(FIGURE 44)

SAMPLE CONDITION REPORT

checklist format

**This object examination/condition report is reprinted courtesy of
the Arizona State Museum.**

(FIGURE 45)

ARIZONA STATE MUSEUM
CONDITION REPORT

Cat. # _____ Object: _____ Recorder: _____ Date: _____

Materials (General): _____

Damage (If Known) Due to:

- ___ Fire/Smoke/Water*
- ___ Display/Interpretive Programs*
- ___ Handling/Shipping*
- ___ Storage
- ___ Other

Evidence of:

- ___ Prehistoric/Ethnographic Deposits*
- ___ Prehistoric/Ethnographic Usewear*
- ___ Prehistoric/Ethnographic Repairs*
- ___ Minor/Major Restoration *
- ___ Minor/Major Repair*
- ___ Other
- ___ Modern Use

Parts are:

- ___ Detached
- ___ Missing
- ___ Moving
- ___ Loose

Deposits

- ___ Corrosion/Tarnish*
- ___ Crystalline
- ___ Encrustations
- ___ Marks
- ___ Dusty
- ___ Greasy/Waxy*
- ___ Soiled
- ___ Finger Marks
- ___ Other Deposits

Physical:

- ___ Abraded/Worn*
- ___ Brittle/Dry*
- ___ Broken
- ___ Burned/Charred*
- ___ Cracked
- ___ Cut/Split/Tear*
- ___ Folded/Creased*
- ___ Hole
- ___ Discolored
- ___ Darkened
- ___ Dye Bleeding
- ___ Faded
- ___ Stained
- ___ Distorted
- ___ Bent
- ___ Crushed
- ___ Warped
- ___ Frayed/Shredded*
- ___ Shedding
- ___ Weave Breakage/Loss*
- ___ Selvage Breakage/Loss*
- ___ Warp Breakage /Loss*
- ___ Weft Breakage/Loss*
- ___ Wrinkled
- ___ Surface Damaged
- ___ Buckled/Lifted Areas*
- ___ Chipped/Flaked*
- ___ Cracked/Crazed*
- ___ Powdered
- ___ Scratched
- ___ Spalled
- ___ Other

Biological:

- ___ Past/Present Insect Damage or Infestation*
- ___ Past/Present Mold*
- ___ Other
- ___ Pesticide Use

Smell

- ___ Chemical
- ___ Moldy
- ___ Other

___ Photo on back

Stability:

- ___ Stable
- ___ Unstable
- ___ Uncertain

General Condition:

- ___ Excellent (Perfect)
- ___ Good (Minimal, minor defects)
- ___ Fair (Many defects, but stable)
- ___ Poor (Might need stabilization)

Actions Completed-Date

- ___ Frozen
- ___ Vacuumed

Action Recommendation:

- ___ None
- ___ Monitor
- ___ To Conservation-

Comments: _____

Check conditions if they apply, use space at end of condition to clarify "where" and "what." *If used, cross out term that does not apply.

11/20/96

REH

Figure 45 – Sample Condition Report: Checklist Format

SAMPLE CONDITION REPORT

for natural history specimens

**The form is reprinted here courtesy of the Virginia Museum of
Natural History.**

(Figure 46)



CONDITION REPORT - MOUNTED SPECIMENS

Reported by: _____ Date: _____

1001 Douglas Avenue • Martinsville, Virginia 24112
 540•666•8600 Fax: 540•632•6487 Tdd: 540•666•8638 www.vznmh.org

CATALOG NO.: _____ COMMON NAME: _____

PREPARATOR: _____ GENUS/SPECIES: _____

PREP. NO.: _____ FAMILY: _____

NATURE OF SPECIMEN: Full Mount Head & Shoulders Cast Other: _____

NATURE OF BASE / SUPPORT: _____

CONDITION of specimen: Excellent Good Fair Poor
 CONDITION of base: Excellent Good Fair Poor Steady Wobbles

IDENTIFYING MARKS/LABELS (list initials, numbers; sketch; note location on specimen)

- Tag
- Tattoo
- Other
- None

PREPARATION REPORTS:

- Prior to mounting
- Mounting/taxidermy records date: _____
- source: _____

EVIDENCE OF PREVIOUS REPAIRS/TREATMENTS:

- None
- Re-attached parts
- Other: _____

BIOLOGICAL DAMAGE:

- None
- Mold/mildew
- Insects active inactive
- type of insects: _____

CHEMICAL DAMAGE:

- None Powdery deposits
- Stains Crystalline deposits
- Faded (foxed) Odorous
- Other: _____

PHYSICAL DAMAGE:

	Broken/ torn	Cracked	Loose	Detached	Grease	Dirty/ Dusty	Dry	Holes	Water Damage	Worn Spots	Dis- colored	Other
Ears	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Antlers/horns	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Eye openings	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Beaks/bills	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Nose region	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Mouth	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Wings	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Legs	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Fins	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Feet	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Tail	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Body	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Feathers	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Hair	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Base/Support	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____

LOCATION OF SPECIMEN: _____

COMMENTS:



An Agency of the Secretary of Natural Resources, Commonwealth of Virginia

VMNH-24July2001

Figure 46 – Sample Condition Report for Natural History Specimens

SAMPLE CONDITION REPORT

for an object on loan

Note that this form accommodates condition reporting at different stages in the loan. It is reprinted here courtesy of Honolulu Academy of Arts.

(FIGURE 47)



HONOLULU ACADEMY OF ARTS

Min Chiu Society's 40th Anniversary Exhibition

Exhibit No.: _____

Accession No.: _____ Artist Name: _____

Condition upon un-packing at Hong Kong Museum of Art
July 6, 2001 to August 26, 2001

conditioned unchanged

condition changed:

Examined by: _____ Date: _____
Honolulu Academy of Arts Representative

Examined by: _____ Date: _____
Borrower Representative

Condition upon packing at Hong Kong Museum of Art

conditioned unchanged

condition changed:

Examined by: _____ Date: _____
Honolulu Academy of Arts Representative

Examined by: _____ Date: _____
Borrower Representative

Figure 47 – Sample Condition Report for Object on Loan (3 pages)



HONOLULU ACADEMY OF ARTS
CONDITION REPORT

Min Chiu Society's 40th Anniversary Exhibition

Exhibit No.: _____

Crate No.: _____

Hong Kong Museum of Art • July 6, 2001 to August 26, 2001

Title: _____

Accession No.: _____ Artist: _____

Culture/Period/Century: _____

Medium: _____

Sheet Dimensions: _____ (h) _____ (w) _____ (d) _____ (l) *in*

_____ (h) _____ (w) _____ (d) _____ (l) *cm*

SUMMARY OF CONDITION

Outgoing:

Examined By: _____ Date: _____
Pauline Sugino, Assistant Registrar



HONOLULU ACADEMY OF ARTS

Min Chiu Society's 40th Anniversary Exhibition _____ Exhibit No.: _____

Accession No.: _____ Artist Name: _____

Condition upon un-packing at Honolulu Academy of Arts on _____

conditioned unchanged

condition changed:

Examined by: _____ Date: _____
Honolulu Academy of Arts Representative

Filing and Distributing Copies

Copies of condition reports should be filed in the object (catalog) folders. If the object is loaned out to another institution, a copy of the condition report that is prepared for the loan should accompany the object.

Useful References

For further information, you may wish to consult these references:

- *Basic Condition Reporting: A Handbook*, Priscilla O'Reilly and Allyn Lord, eds. Southeastern Registrars Association, 2nd ed., 1988.
- "Guidelines for Selecting a Conservator," published by the American Institute for Conservation of Historic and Artistic Works (AIC), 1717 K Street, NW, Suite 200, Washington, D.C. 20006. e-mail: info@aic-faic.org. Website: <http://aic.stanford.edu>.

This brochure provides information on how to locate a conservator if you need one to prepare a condition report. It includes a section on the Foundation of the American Institute for Conservation (FAIC) Conservation Services Referral System. The FAIC Referral System offers a means of identifying and locating professional conservation services for large and small jobs, for specific types of objects, and for particular locations.

- *The New Museum Registration Methods*. Rebecca A. Buck and Jean Allman Gilmore eds. American Association of Museums, 1998. Washington, DC. Pp. 53-62.

This book contains a section entitled "Condition Reporting" by Marie Demeroukas. In addition to the basic information presented, there is an excellent glossary of condition reporting terms in this section.

Appraisals

What Is an Appraisal?

An appraisal is an estimate of the worth of a given object. It is based on the informed, professional opinion of an appraiser. While DPR staff may be able to determine the **historical and/or interpretive value** of an object, a qualified, independent appraiser is generally needed to determine the **monetary value** of a given object.

There are several types of appraisals. The appraisals DPR curatorial staff are most commonly concerned with are Fair Market Value and Replacement Cost.

Fair Market Value (FMV) is defined by the Internal Revenue Service in Regulation Section 1.170A-1(c)(2) as follows: “The price at which a property would change hands between a willing buyer and a willing seller, neither being under compulsion to buy or to sell and both having reasonable knowledge of relevant facts.” FMV is the value that should be used for most DPR purposes.

Replacement Cost involves the researching of retail replacement for items either through purchase, reproduction, or production for insurance coverage, damage claims, or loss of an item. Replacement Cost is most commonly higher than Fair Market Value due to the involvement of the retail market. But if an item is commonly purchased in the auction market, the Fair Market Value and Replacement Cost could in fact be the same monetary amount.

It is important to remember that appraised values are subjective. Conditions such as an appraiser’s experience and physical location may influence how a value is determined. For example, a painting by a painter well known on the West Coast may be appraised at a higher value by an appraiser in Los Angeles than an appraiser in Boston.

When Is an Appraisal Needed?

While it may be interesting to know the monetary value of collections, it is generally not necessary or practical to obtain and/or maintain current values. Appraisals may be needed under various circumstances, however, including the following:

- To determine for insurance purposes the value of an object for an outgoing loan. (Note that fees associated with such loans, including the cost of an appraisal, are often paid for by the borrowing institution.)
- To quantify a loss due to theft or damage.
- To support a grant or funding application.
- To provide a donor with information for tax purposes, namely to complete an IRS form 8283.
- To meet a documentation need in conjunction with a deaccession proposal.

Who May Appraise Museum Objects?

Curators may estimate insurance values for loans and internal use, and with the permission of their museum for other nonprofit institutions, but they must not prepare appraisals for gifts, objects to be deaccessioned, private purchase and sale, or any other reason.

from American Association of Museums'
(AAM) *Curators' Code of Ethics*, 1996

Appraisals often involve legal and, as indicated in this quotation from AAM's *Curators' Code of Ethics*, ethical considerations. It is important for DPR curatorial staff to be aware of when it is appropriate to appraise museum objects internally and when outside appraisals are needed. The list that follows describes the circumstances that dictate who may appraise museum collections.

Gifts

DPR employees should not place a monetary value on a gift document, or offer a monetary value verbally. While all gifts to the Department of Parks and Recreation are tax deductible and donors may need to establish value for tax purposes, they must obtain such appraisals from outside sources. It is against state policy for employees to provide appraisals of personal property for others. The restriction on DPR appraisals of gifts extends to an item that is purchased for a museum by a private individual. Such a purchase will ultimately be processed as a gift to the Department.

Deaccessions

DPR employees should not place a monetary value on museum objects that are disposed of in a deaccession through the following means:

- Gift/transfer to a public museum or other agency.
- Sale at public auction or by competitive bid.

DPR staff should obtain appraisals from professional appraisers in advance of the disposal of museum objects in these instances.

Incoming Loans

The lender should provide the valuation on the loan document. If the lender is unable (or unwilling) to provide a value, standard practice is to ask the lender to agree (in writing) to accept a value set by DPR. This value, however, is not to be considered an appraisal.

Outgoing Loans

Typically the borrowing institution will pay for an appraisal, if one is required. Otherwise DPR staff should list a valuation of the object on the DPR 928 Loan Agreement. If it is not possible to obtain information about the value of the objects to be loaned, staff may indicate on the form that "Valuation will be subject to fair market value at time of loss."

Completion of Loss or Damage Reports

When museum objects are stolen, missing, vandalized, destroyed by accident or damaged in some other way, the circumstances are reported on a *DPR 888, Museum Collections Loss or Damage Report*. The report calls for an appraised value of all lost or damaged museum objects. In such instances, DPR staff must either make use of figures from recent appraisals, if they have been done, or make a determination of the current market value of the objects.

Requests for Appraisals by Other Nonprofit Institutions

With permission from a superintendent or supervisor, DPR curatorial staff may respond to requests for appraisals from other nonprofit institutions.

Internal Purposes

DPR curatorial staff may provide informed collection appraisals for budget justifications, conservation planning, and other internal purposes.

How to Find an Appraiser

Appraisers are not licensed or regulated by any form of government oversight, so selecting a competent appraiser must be done carefully. Appraisals can be obtained from a variety of sources including the following:

- Professional associations that can provide referrals. Two such organizations are the Appraisers Association of America (AAA) and the International Society of Appraisers (ISA). They can be contacted at the addresses listed below:

Appraisers Association of America
386 Park Avenue South, Suite 2000
New York, NY 10016
Phone: (212) 889-5404
Fax: (212) 889-5603
E-mail: aaa1@rcn.com

International Society of Appraisers (ISA)
16040 Christensen Road, Suite 102
Seattle, WA 98188-2965
Phone: (888) 472-4732
Fax: (206) 241-0436
E-mail: ISAHQ@isa-appraisers.org

- Auction houses (For assistance in locating appropriate auction houses, contact Museum Services Section).
- Independent appraisers. Be aware that many independent appraisers are also commercial dealers, so care must be taken to avoid potential conflicts of interest.
- From other nonprofit museums.
- Published references such as auction sales reports, price guides, and catalogs and trade publications. (These sources may be helpful in determining a value for in-house use.)

Appraisals for Collections with Special Considerations

Certain types of collections, such as natural history or archaeological collections, may be more challenging than others in terms of establishing a current, fair value. One approach is to calculate the cost of fieldwork to collect similar materials again or the cost of purchasing similar materials. This figure might also include the costs of preparing, cataloging, and long-term storage for specimens or artifacts.

Contracting for an Appraisal

Ideally, appraisals should be based upon the physical examination of the object and any related documentation (accession file, donor records, etc.) If this is not possible, photographs showing various views of the piece along with a detailed written description can be used.

Until 1984, the cost of an appraisal was often based on a percentage of the value of the appraised object. The current practice is for appraisers to charge a set hourly or daily rate. It is wise to obtain an estimate before contracting for an appraisal.

Some appraisers or organizations occasionally offer to provide free “courtesy” evaluations. While such assessments may be useful for internal purposes, under most circumstances, it is best to contract for (and pay for) a formal appraisal.

Recommending Appraisers to Others

For a variety of reasons, you may be asked from time to time to recommend appraisers. In keeping with professional ethics and practices, you should provide the names of several individuals to avoid the appearance of favoritism.

What Should an Appraisal Include?

A copy of the “Elements of a Correctly Prepared Appraisal” appears at the end of this section with the permission of the Appraisers Association of America, Inc. (See Figure 48.) Produced by the AAA, it contains the basic information that should be included in an appraisal.

Filing an Appraisal

Formal appraisals and/or other documents, such as entries from auction catalogs or price guides, which could be used to determine the monetary value of an object, are usually filed in the unit's object folders. When appraisal reports are done for objects whose values need to remain confidential, those reports should be filed separately in a secure cabinet.

Elements of a Correctly Prepared Appraisal

Formulated by the

Appraisers Association of America, Inc

(Reprinted with the permission of the Appraisers Association of America, Inc.)

(FIGURE 48)



**Appraisers
Association of
America, Inc.**

386 Park Avenue South New York, NY 10016

Tel. (212) 889-5404
Fax (212) 889-5503
E-mail aaa1@rcn.com
www.appraisersassoc.org

Elements of a Correctly Prepared Appraisal

Formulated by the Appraisers Association of America, Inc.

Name and Address of Client

Purpose of the Appraisal. Intended use: Donation, Estate, Equitable Distribution, Insurance, Etc.

Type of Valuation Used. Replacement Value, Fair Market Value, Marketable Cash Value, etc. and Definition.

Valuation Approach used: Cost Estimate Approach, Income Approach, Market Data Comparison Approach, etc

Market in which valuation is applied; most common market (place).

Market Analysis: Generic market History and possible projections for future activity.

How objects were acquired – especially for IRS purposes.

Statement of Professional Qualifications of Appraisers. Curriculum Vitae.

Date of Preparation of Appraisal and date on which objects were viewed. Effective date of Appraisal.

Statement of physical inspection or method used in determining value. Any qualifications?

Statement of "disinterest" on the part of the Appraiser.

Statement that the Appraiser has not been "disqualified" by the IRS (for IRS Appraisals).

Statement of Assumptions and Limiting Conditions.

Statement of Fee Structure. (Statement that the Appraisers fee is not contingent on appraised value of objects.)

Statement of belief in authenticity; that the appraised object(s) correspond to description(s) listed in the Appraisal.

Clear division of appraisal when one or more than one appraiser is involved. Who did what? Inclusion of Curriculum Vitae of consulting appraiser.

Thorough description of appraised objects. Measurements and weights when applicable.

Brief biography of the artist when necessary.

Provenance (if available).

Exhibition and Publication History (if any).

Statement of condition of appraised objects.

Comparables and related analysis When necessary.

Firm statement of Value -- not estimates, except when followed by detailed explanations of qualifications.

Signature of Appraiser(s) and Tax ID number(s) when appraisal is prepared for IRS purposes.

Statement of number of pages in appraisal.

(Copyright AAA 2001, 1999, 1998, 1996, 1995, 1994, 1993,1992, 1991)

Inventories

What Is an Inventory?

An inventory is the process and the product of verifying the existence, location, and sometimes condition of objects in a museum collection. An inventory can be of an exhibit case, a single room, or an entire collection. Inventories always involve checking the physical location of objects against recorded locations.

A distinction should be made between an inventory and a catalog. The definitions of these terms are similar, but not the same:

A catalog is a systematized list that includes descriptions of all the items in a museum collection. Cataloging is the process of creating such a list.

An inventory is a survey or examination of all or part of a collection. Inventorying is the process of surveying a collection or portion of a collection.

Methods of Conducting a Physical Inventory

There are two basic methods for taking a physical inventory:

1. For a manual inventory, write each object down and later compile a completed list of objects in numerical order.

For an electronic inventory, locate each object by object number and update the location and date. Enter those objects that are not in the database.

This method is normally used for an initial inventory of a collection.

2. For a manual inventory, locate and check objects off a previous inventory.

For an electronic inventory, locate the objects from a previous inventory by object number in TMS. Update location and date for each object.

What Types of Objects Are Covered in This Section?

This section covers inventories of three-dimensional museum objects only. Archival, archaeological, and paleontological collections have special considerations that will be addressed in Chapter 9 Special Collections, when that section is completed.

When Are Inventories Needed?

There are many reasons for conducting inventories:

- To account for the objects in the collection. (According to DOM 2010.9.1, appropriate collections care includes regularly scheduled inventories.)
- To assess the objects in a newly acquired park.
- To deal with a backlog of uncataloged objects in storage and/or on exhibit.
- To respond to a public inquiry.
- To identify objects that need conservation.
- To establish a basis for planning and funding any collection-related project.
- To determine security needs for a collection.
- To update object locations.
- To determine the collection content for a park where an inventory has never been done.
- To determine what's missing when a theft is suspected.
- To reconcile a gift, a loan, or a list of objects, and verify that the listed objects are present.
- To plan for collections development, deaccession, or conservation.

Types of Inventories

The different types of inventories depend on the goals of the project.

Complete Inventory – Every object of an entire park or entire collection is viewed and its status and location are recorded.

Section Inventory – The scope of a section inventory is narrower than that of a complete inventory. It involves one area, one collection, one category (e.g., military equipment, or one aspect of a collection, such as high-value objects).

Spot Inventory – A spot inventory is very limited in scope and encompasses only a small portion of the collection. It could include one exhibit case or all items of one type, gold pans for instance, or all items donated from one source.

Planning an Inventory

Planning for an inventory project is important. There are many details to consider. Good planning will save you time. Moreover, inventories often require additional staffing and funding that must be secured well in advance of the project.

1) Define the Scope of the Inventory

In determining the scope or extent of your inventory, the following variables should be considered:

- The size of the collection
- The variety within the collection in terms of materials and categories of objects
- The degree to which the collection has been organized
- The state of the collection records, including how complete, thorough, and reliable they are, and if they have been entered electronically
- The number of people who are available to carry out the inventory or who need to be hired
- The background and training of the people carrying out the inventory
- The amount of movement going on within the collection for research, exhibition, conservation, or other activities

2) Define the Goals of the Inventory

These are some of the typical goals achieved through an inventory:

- To determine the contents of a collection
- To determine the location of a collection
- To determine if objects listed in prior records are physically present
- To determine the accuracy of registration records
- To determine conservation needs
- To record and/or verify storage and exhibit locations
- To organize the collection
- To improve storage or exhibition conditions
- To update catalog descriptions
- To improve collection security

3) Decide Whether the Inventory Should Be Conducted Manually or Electronically

For many park units the prospect of conducting a large inventory has provided the impetus to convert to computerized records management. A computerized inventory enables staff to sort and search for objects with speed and accuracy not possible with a manual inventory. Since all existing museum records should be entered into the database prior to the physical inventory, the team can pull up objects by catalog number and thereby determine which objects have not been cataloged. Many times more than one object has been assigned the same number. Individuals conducting an inventory electronically can quickly determine if there are objects with duplicate numbers and then assign each a separate number (794-2-100 and 794-2-100.d on the second object). When an object is unnumbered or has lost its number, the computer gives the inventory team the ability to search the park's database by object name, description, or any other outstanding feature such as inscriptions or serial numbers.

If you have questions about the use of computers in conducting inventories or about converting from manual records management to electronic records management, call or e-mail Museum Services Section, which is responsible for coordinating the Department's collections management database.

4) Estimate the Number of Objects to Be Inventoried

In order to determine the time and staff needed to complete an inventory, you will need to estimate the number of objects to be inventoried and/or cataloged. To do this, consult existing catalog records and inventories. Take into account the proportion of objects that have not already been cataloged, as this is a time-consuming aspect of an inventory. In coming up with your estimate, it is often helpful to group objects according to location (room, cabinet) or kind of object.

5) Determine Who Will Be on the Inventory Team and Their Roles

Estimate the number and type (classifications) of staff needed to complete the inventory. You may need the assistance of some or all of the following staff members:

The Park or District Superintendent who is responsible for the appropriate care of museum collections under his/her jurisdiction. You will need to have the support and approval of your superintendent to implement an inventory.

Museum Curator. An inventory project requires a trained collection manager or a curator to lead it. If there is no collections manager on staff, you can request help from the curator at the Northern Service Center.

Team Members. Possible staffing classifications may include museum technicians, museum custodians, student interns, student assistants, or retired annuitants. If you draw upon staff from your unit, consider how the additional workload will impact their regular assignments.

Sometimes you will need to hire extra workers for a specific length of time. Take into account the labor pool available to you such as students on summer break, or park volunteers who would like to have paid work for a while. You might also draw upon California Conservation Corps workers to move objects or clean a building, etc.

If you bring in staff from outside the district, you will need to take into account per diem and housing needs.

Resource People

There are often staff members at a park unit who do not have curatorial classifications, but who have a special interest and knowledge of the collections. They may be rangers, seasonals, or volunteers. It is well worthwhile identifying such persons for the information they can provide relating to the collection.

6) Take into Account Other Tasks To Be Accomplished During the Inventory

Consider other tasks you may want to accomplish at the same time as your inventory. For example, you may want to re-package objects or re-drape furnishings. You may want to move the collection. You may have specific items that you want to have conserved. You may want to include photography in the project, which would require additional time, as well as additional costs for staff and materials to organize the photographs after they are developed.

7) Determine If Training Will Be Needed

You will need to determine training needs for project staff. The training may consist of a review of cataloging, inventory, and cleaning techniques. Training may also involve teaching staff how to use an electronic cataloging program, if the inventory is computerized. A review of safety precautions should be included on such topics as lifting, avoiding exposure to pesticides on objects and pathogens where objects may be stored and other potential health hazards.

8) Plan When and How Long the Inventory Will Take

Past experience by DPR staff has shown that it is best to plan and complete inventory work in a block of time. Inventories that are planned “as you have time” don’t get done. An estimate of the time it will take to complete the inventory will be important to you in gaining funding and staff for the project.

Method I. Calculate how much time it will take to catalog and/or inventory each group of objects. Some objects may take longer than others to count or catalog. For example, an object removed by two persons using a ladder may take longer than 15 identical china plates on a shelf, which can be done best by one person. Establish a rate of objects per-hour, which includes the number of persons to achieve that rate. For example: Two objects per hour by two persons; 15 objects per hour by one person. It is important that your estimates are realistic. If you have not done this type of work before, you may want to ask for assistance from someone who has had experience with it.

Use the estimated number of objects and the rate to calculate the number of person-hours needed to do each group. For example: 300 objects cataloged at a rate of 12 objects per hour by a team of two people would require 50 person-hours. The same number of objects cataloged at a rate of 10 objects per hour by one person would require 30 person-hours. Add up all the groups to get the total “hands-on” hours for the project.

Method II. Another method of determining the time and staff needed for an inventory is to do a trial run with a limited but representative part of the collection. You can then estimate the time it will take to do the inventory per object factoring in other tasks that are to be completed.

9) Develop a Schedule for Your Inventory

After you have calculated the time and staff it will take to do the inventory, develop a schedule that you can share with your Superintendent and all others who are affected by this project.

Conducting an Inventory

Once your plans are in place, the following steps are typically involved in doing the inventory:

1) Prepare the Area Before Starting

It will save you time and frustration if the work area is prepared before the work begins:

- Ensure that there is sufficient space to do the work.
- Check to see that there is adequate lighting.
- Make sure there are electrical power outlets or extension cords, particularly if you are using laptop computers.
- Locate a portable table, chairs, and ladder, if needed.
- Create a sign to inform the public of the activity.
- Fans or heaters may be needed in some locations.

2) Assemble the Equipment

Among the equipment you may need to gather in advance are these items:

- Safety gear, such as dust masks, gloves, and smocks.
- Cataloging kits (See Chapter 7, The Catalog Kit, pages 7.38–7.39)
- Cleaning cloths
- Vacuum cleaner, brushes, screens
- Plastic baggies

- Clipboards
- Paper
- Pencils
- Magnifying glasses
- Flashlights
- Batteries (if using laptops)
- DPR 933, Collection Inventory forms, if the inventory is conducted manually

3) Gather or Have Accessible Pre-existing Records

It will be important to have these records available during the inventory:

- Copies of former inventories
- The unit's accession book
- Accession files, object files
- Donor records
- Location charts (See Chapter 5 Registration, pages 5.43–5.44 for more information on Park Location Charts, both Manual and Electronic Versions.)
- Catalog cards (should be accessible)
- Photographs

4) If you are conducting the inventory electronically, make sure all existing records (i.e., accessions, catalog cards, etc.) have been entered into the statewide database before the inventory begins.

5) If you are working manually, use the *DPR 933, Collection Inventory* form to document objects as you conduct the inventory.

The *DPR 933, Collection Inventory* form provides a uniform means of recording objects found during an inventory. It has columns for the three most basic pieces of information: the catalog number, the object name, and the location code. It also offers two blank columns for special codes or confirmation marks customized for the park. (See sample form, Figure 49, page 8.35.)

Note: if the inventory is conducted electronically, the *DPR 933, Collection Inventory* form is not needed.

6) Photograph or videotape each object and each room, if this is one of the goals of the inventory

See Photographing Objects for Identification, Chapter 7, page 7.25.

7) Reconcile the list of objects present with former inventories, transfers, loans, and deaccessions to determine if anything is missing.

8) Catalog, mark, and add to the inventory list all uncataloged objects that can be identified.

9) Make a final list that identifies missing objects.

10) Complete a *DPR 888, Museum Collections Loss or Damage Report* for all objects that are missing or damaged.

During an inventory or at any other time when an object is missing or damaged, it is important to complete a *DPR 888, Museum Collections Loss or Damage Report*. The report documents all of the following circumstances:

- An object is missing (i.e., it is not found in its expected location.)
- An object has been vandalized or is known to have been stolen.
- An object has been destroyed by accident (e.g., breakage by staff, visitors, or failure of materials or structures).
- An object has been destroyed or seriously damaged through an act of God (e.g., floods, earthquakes).
- An object has been destroyed or seriously affected by infestations of pests or rodents, or exposure.

The form serves several purposes:

- It documents the history of individual objects that are missing or damaged.
- It advises the Superintendent of the incident and staff response to it.
- Together with other DPR 888s, it provides an overview of hazards and vulnerabilities for subsequent Collection Managers.
- It serves to document criminal activity. The DPR 888 serves to augment the DPR 385, *Public Safety Report*. If a crime has been committed (a museum object is stolen or vandalized), you should notify law enforcement staff at your unit as soon as possible.

If a pattern develops indicating theft, information on the DPR 888 relating to the value of the objects will be important in determining whether the crime is a felony or misdemeanor.

For step-by-step instructions for completing a *DPR 888, Museum Collections Loss or Damage Report* see sample report, Figure 50, pages 8.39-8.42 this chapter.

11) Write up a report of the inventory for the District Superintendent.

If you need assistance with the format or content of such a report contact the curator in the Northern Service Center, or a staff member in Museum Services Section.

12) Set up a checklist for future inventories by printing out the inventory by storage locations.

13) File copies of the complete inventory and report at the park unit office and with Statewide Museum Collections Records in Sacramento.

DPR 933
COLLECTION INVENTORY
(FIGURE 49)

Instructions for Completion of *DPR 933 Collection Inventory*

This form can be filled out by hand or on a computer using the template for the DPR 933, Collection Inventory form available on Excel. A copy of this and other collections management forms can be ordered from Museum Services Section on disk or can be accessed on the Department's Share Folder.

- 1) Fill in the date.
- 2) Enter the name or names of the person recording the information.
- 3) Number each sheet. For example: 1 of 19 [pages].
- 4) Enter the Park name and the facility.
- 5) List the catalog number for each object in the inventory.
- 6) List the object name.
- 7) List the name or code number to indicate the location of the object.


CALIFORNIA STATE PARKS
MUSEUM COLLECTIONS
State of California - The Resources Agency
 DEPARTMENT OF PARKS AND RECREATION

Collections Inventory

①	Date	3/30/2001
②	Inventory by	Christina Kudrina
③	Sheet	6 of 30

④ Park **Fabled Farm SHP** Facility **Building 4, Sawyer House**

⑤	Catalog No.	⑥	Object	⑦	Location
	794-301-1		Mirror		North Wall
	794-301-2		Frame		North Wall
	794-69-75		Wash basin, white		North Wall
	794-69-201		Pitcher, white with raised pattern		North Wall
	794-69-42		Umbrella, brown fabric, wood circular handle		North Wall
	794-98-1		Chair, bentwood with rawhide seat and back		North Wall
	794-27-5		Lamp		North Wall
	794-69-89		Trunk, leather, galvanized metal base		North Wall
	794-69-54		Spittoon, white enamel		North Wall
	794-103-17		Bellows		West Wall
	794-103-23		Axe, metal head, wood handle		West Wall
	794-69-233		Certificate, "Geoffrey S. Sawyer"		West Wall
	794-69-234		Frame, wood		West Wall
	794-103-24		Pan, tripod legs, cast iron		West Wall
	794-103-15		Trivet, fireplace, metal		West Wall
	794-103-25		Pan, tripod legs, cast iron		West Wall
	365-12		Andiron		West Wall
	365-12.d		Andiron		West Wall
	51964		Basket, wicker and woven grass		West Wall
	794-69-92		Table, painted white		South Wall
	794-69-93		Chair, painted white		South Wall
	794-69-94		Chair, painted white		South Wall
	794-69-95		Chair, painted white		South Wall
	794-28-1		Tablecloth, blue checked		South Wall

DPR 933 (Rev. 4/89)(Front)(Excel 4/23/1999)

Side A

Figure 49 – Sample DPR 933, Collection Inventory

Catalog No.	Object	Location
794-28-2	Napkin, blue checked	South Wall
794-28-3	Napkin, blue checked	South Wall
794-28-4	Napkin, blue checked	South Wall
794-69-43	Plate, china, white	South Wall
794-69-44	Plate, china, white	South Wall
794-69-45	Plate, china, white	South Wall
794-69-78	Knife	South Wall
794-69-79	Knife	South Wall
794-69-80	Knife	South Wall
794-69-84	Fork	South Wall
794-69-85	Fork	South Wall
794-69-86	Fork	South Wall
794-69-90	Spoon	South Wall
794-69-92	Spoon	South Wall
794-69-93	Spoon	South Wall
324-16-4	Candlestick, brass	South Wall
794-98-2	Rug, braid	South Wall
4320	Rug, grizzly bear	Center of Room
794-69-306	Table, wood	Center of Room
794-69-143	Chair, wood ladderbak	Center of Room
794-69-144	Chair, wood ladderbak	Center of Room
794-15-3	Book, Law of Evidence, Greenleaf, calfskin	Center of Room
794-15-30	Book, Psalms of David	Center of Room
794-69-56	Inkwell	Center of Room
457-10-1	Eyeglasses, wire bifocals	Center of Room
	Cartridge shell, empty	Center of Room
794-69-18	Quill, feather	Center of Room
	Strongbox, black with ship design painted on top	Center of Room

DPR 933 (Back)

Side B

***DPR 888,
MUSEUM COLLECTIONS
LOSS OR DAMAGE REPORT***

(FIGURE 50)

**Instructions for Completion of
*DPR 888, Museum Collections Loss or Damage Report***

This form can be filled out by hand or on a typewriter. (There isn't an electronic version of this form as yet.)

1. Fill in the date.
2. Complete items 1-13 of the report..
3. If an object is subsequently found, record that fact on the form.
4. Remember, the DPR 888, does not replace, but augments the information in a DPR385, *Public Safety Report*. If a crime has been committed (an object is stolen or vandalized), communicate that information as soon as possible to the unit's law enforcement staff.

State of California — The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

Page 1 of 1

MUSEUM COLLECTIONS LOSS OR DAMAGE REPORT

DATE
March 29, 2001

The purpose of this form is to document occurrences and subsequent resolution of events that resulted in loss or damage to museum objects such as thefts, missing objects, vandalism, accidents, or damage resulting from natural disasters.

Items 1 — 13 of this report must be submitted within 48 hours to the District Superintendent or designee. Use additional sheets as necessary and attach additional documentation. **ITEM 14: IF ANY OBJECT(S) ARE STOLEN, LOST, OR VANDALIZED, A VALUE MUST BE OBTAINED WITHIN 48 HOURS FOR PURPOSES OF THE CRIME REPORT, AS THE VALUES CAN AFFECT A LEGAL CASE (FELONY OR MISDEMEANOR).**

1. DISTRICT Great Valley District	2. PARK UNIT Fabled Farm SHP
--------------------------------------	---------------------------------

3. STOLEN, LOST OR DAMAGED OBJECTS (List by catalogue number):			
Catalogue Number (Write "No #" if unknown, or write accession number if the only element known)	Object Name	Location (Referring to the Unit Location Chart, give name, number, and room location by name and number.)	Description of Damage (Referring to if the object is stolen, missing or damaged. Describe nature of damage.)
794-69-76	pie safe	794.4.6.NW	The top, back and one side of this pie safe are badly warped due to a leaky heating pipe in the steam heating system

4. DATE AND TIME OF OCCURRENCE (if unknown, give date and time of discovery of occurrence)
March 4, 2001 - damage discovered during annual collection inventory

5. CIRCUMSTANCES OF OCCURRENCE, ACTUAL CAUSE AND, IF APPLICABLE, ANY CORRECTIVE ACTIONS TAKEN

6. INITIAL ACTION TAKEN TO PROTECT OR PRESERVE OBJECT(S) (e.g., gathered broken pieces and moved into Room #1/5 Storage, closed exhibit, notified Chief Ranger)
Maintenance chief shut off heating system until it can be examined and repaired

7. RESPONSIBLE PARTY (e.g., the individual responsible for the damage, or the organization visiting when the incident occurred)	8. HOME PHONE NO.	9. BUSINESS PHONE NO.
---	-------------------	-----------------------

10. STREET ADDRESS	11. CITY/STATE/ZIP CODE
--------------------	-------------------------

12. CRIME REPORT NO. (Attach copy)	13. TOTAL APPRAISED VALUE OF ALL LOST OR DAMAGED MUSEUM OBJECTS, IF APPLICABLE (Attach copy of the appraisal list) \$
------------------------------------	--

14. DATE REQUEST FOR CONSERVATION REPORT SUBMITTED	15. DATE CONSERVATION REPORT COMPLETED	16. CONSERVATION/REPLACEMENT COST PER CONSERVATION REPORT
--	--	---

17. RESOLUTION (What was finally decided upon, whether the objects will be conserved or replaced and who is responsible to effect the conservation or purchase. If the object is on loan to DPR, the owners should be notified immediately.)

18. NAME AND TITLE OF PERSON(S) COMPLETING THIS REPORT AND DATE(S) (The report may be filled out by more than one person, e.g., at the time of the event and during resolution) Christina Kudrina Curator I	19. VALUE/DISPOSITION INFO. NOTED ON CATALOGUE CARDS <input checked="" type="checkbox"/> District (White) <input checked="" type="checkbox"/> Unit (Buff)
---	---

Original to Unit Object Files; Copies to Unit Condition Report Files, District Superintendent, Statewide Collection Records
DPR 888 (New 12/94)

Figure 50 – Sample DPR 888, Museum Collections Loss or Damage Report

Distribution of Copies

There is no number sequence for the DPR 888, Museum Collections Loss or Damage Report. The date of occurrence is used for filing and retrieval.

- 1) The original is filed in chronological order, along with any supporting information or related reports, in the park unit's *Museum Collection Loss and Damage Reports* file.
- 2) A copy of the report is placed in the catalog folder of each object involved.
- 3) A copy is forwarded to the Superintendent.
- 4) The activity is recorded in the Accession Book
- 5) In cases of artifact loss, a copy is forwarded to Statewide Museum Collections Records. In cases of theft, a copy is forwarded to the Department's Audits Office in accordance with SAM Section 8643.

Inventory Checklist

You may find the following checklist helpful when planning and conducting an inventory at your unit.

Planning an Inventory

- Define the scope of the inventory.
- Define the goals of the inventory.
- Decide whether the inventory is to be conducted manually or electronically.
- Determine who will be on the inventory team and their roles.
- Take into account other tasks to be accomplished during the inventory (e.g., re-package objects, move collection to another location, identify objects for conservation treatment).
- Determine if training will be needed for project participants.
- Develop a schedule for the inventory.

Conducting an Inventory

- Prepare the work area.
- Gather the equipment needed for inventorying.
- Gather or have accessible pre-existing records.
- If staffing allows enter existing records (i.e., accessions, catalog cards, etc.) into the statewide database before the inventory begins.
- If the inventory is to be done manually, use the *DPR 933, Collection Inventory* form to document objects.

- Photograph or videotape each object and each room, if this is one of the goals of the inventory.
- Reconcile the physical list of objects present with former inventories, transfers, loans, and deaccessions to determine if anything is missing.
- Make a final list that identifies missing objects.
- Complete a *DPR 888, Museum Collections Loss or Damage Report*, for all objects that are missing or damaged.
- Write up a report of the inventory for the District Superintendent.
- Set up a checklist for future inventories by printing out the inventory by storage locations.
- File copies of the completed inventory and report at the park unit office and with Statewide Museum Collections Records in Sacramento.

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