

**APPENDIX A: MANDATES AND STANDARDS FOR MUSEUM PROPERTY
COLLECTIONS MANAGEMENT**

A. DEFINITION OF MUSEUM PROPERTY

1. Departmental Definition

- a. Museum property is "an assemblage of museum objects collected according to some rational scheme and maintained so they can be preserved, studied, or interpreted for public benefit. Museum objects include prehistoric and historic objects, artifacts, works of art, archival documents, and natural history specimens that are part of museum collections. Elements, fragments, and components of structures are objects if they are no longer a part of the original structure. Museum property does not include those items necessary to display a collection such as exhibit cases, dioramas, special lighting, graphics, etc." (410 DM 114-60.100n); further,
- b. Museum property includes archeological collections (objects, project-generated documentation, and laboratory and object documentation) as defined by 36 CFR Part 79, "Curation of Federally-Owned and Administered Archeological Collections"); and
- c. Museum property is defined by the bureau and/or unit mission, identified in part by its relationship to the bureau and/or unit's enabling legislation and/or program mission statements, and to unit-specific planning documents that define the mission of the unit; and
- d. Museum property is defined by the bureau and/or unit Scope of Collection Statement; and
- e. Museum property may be identified by its characteristics, which may distinguish it from other kinds of property. These characteristics are not considered exclusive, and additional ones may be applicable. Likewise, not all museum property will have all of these characteristics. Objects and specimens may be considered museum property if they are maintained for public benefit (e.g., reference

and exhibit) and meet one or more of the following characteristics:

- (1) Are generated by systematic research on Federal lands or Indian lands, or through Federal funding or instrument, and are retained (i.e., not consumed in analysis);
- (2) Tend to appreciate in value;
- (3) Are antiques and/or fine art;
- (4) Are associated with a significant event, resource, or eminent figure associated with the bureau;
- (5) Are works commissioned by the bureau;
- (6) Are of significant age (e.g., over 50 years); and/or
- (7) Are rare (e.g., one of a kind).

NOTE: A bureau may have no museums, but still have property that has the characteristics of, and therefore is, "museum property."

Bureau and unit managers, in conjunction with disciplinary, property, and museum specialists, need to identify museum property held by the bureau or unit. Museum property may be located in visitor center or museum exhibits, in cabinets and on shelves in storage areas, in administrative offices, and on loan to other institutions for storage or exhibit purposes. Refer to Section A.4 of this appendix for guidance on materials that are determined not to be museum property.

2. Categories of Museum Property

Museum property may include but is not limited to the following categories:

a. Archeological Collections

Objects (e.g., artifacts and scientific samples),

project-generated documentation (e.g., field notes, maps, drawings and photographs), and laboratory and object documentation (e.g., collections inventories, computer documentation and data, and conservation treatment records) that result from systematic archeological research on Federal lands, tribal lands, or Federal funding. Curation of this type of museum property is mandated by law and regulation (i.e., Archaeological Resources Protection Act of 1979 and 36 CFR Part 79, "Curation of Federally-Owned and Administered Archeological Collections").

b. Native American (Ethnographic) Collections

Native American (Ethnographic) Collections refers to those contemporary Native American objects made or used by or associated with, contemporary Native Americans peoples. "Native American" refers to a contemporary Indian tribe, people, or culture indigenous to the United States, and includes any tribe, band, nation, or other organized Indian group or community of Indians, and natives of the United States Territories.

c. Artwork

Artwork is defined as museum property that was made primarily for aesthetic purposes. Examples of artwork include:

- ! Paintings (e.g., oil, watercolors, or acrylic on various support media, including canvas, artist board, and paper)
- ! Prints and drawings (e.g., pen and ink drawings, pencil sketches, and chromolithographs)
- ! Sculpture (e.g., metal, wood, ceramic, and glass)
- ! Tapestries

d. Historical and/or Scientific Document Collections

Historical and/or Scientific Document Collections provide evidence of historic and/or scientific activities occurring in or related to a unit, and/or that are related to events, persons or resources associated with the unit. Such materials are

important to understanding and managing cultural and natural resources, and frequently are resources themselves.

Historical and/or scientific documentation may be acquired from non-governmental sources (e.g., records from Thomas Edison's laboratory managed by Thomas Edison National Historic Site), or may be generated in the course of Federal business (e.g., most resource management records and associated records). Because these historical and/or scientific document collections are made or acquired for the purposes of reference or exhibition, they are not official records as defined by the National Archives and Records Administration (44 USC 3301).

Examples of document types are:

- ! Visual images (e.g., photographs and slides)
- ! Manuscripts
- ! Site forms, maps, and field notes

e. Historical Collections (Objects)

Objects and historical furnishings that are related to the history of the bureau or history of the lands or functions managed or interpreted. Included in this category are gifts to bureau officials. **NOTE:** 41 CFR 101.49.001-5 requires the reporting of foreign gifts valued over a certain amount (current figure is \$200.00). 5 CFR 2634.301(c)(5) states that employees are prohibited from accepting gifts over \$35.00. Such objects may include:

- ! Furniture of historic or stylistic importance
- ! Rugs (e.g., Oriental)
- ! Natural history specimen mounts (e.g., mammals and birds)
- ! Early equipment and tools
- ! Scale models of agency-built structures and of patented items
- ! Uniforms
- ! Firearms
- ! Objects and/or specimens associated with eminent figures

- ! Early boundary and regulatory signs
- ! Books autographed by and/or belonging to important individuals
- ! Interpretive media of historic interest (e.g., dioramas)

f. Natural History Collections

Natural history collections consist of specimens and samples (not consumed in analysis and determined to be appropriate for long-term preservation) and associated field data, records, and reports resulting from systematic research, often conducted on Federal lands or through Federally-funded projects. Examples may include:

- ! Prepared biological specimens (i.e., plants and animals)
- ! Prepared geological specimens
- ! Paleontological specimens
- ! Type specimens (standard bases for the original descriptions defining species and subspecies taxa)
- ! Voucher specimens (document research activities and/or results)
- ! Soil and core samples (unless managed by an alternate bureau system)
- ! Environmental samples (e.g., residuals that require preservation for future use)

3. Types of Materials Not Considered Museum Property

Materials that are determined not to be museum property must be managed as standard personal property, as records, or in a systematic manner established by the bureau. Decisions on whether materials identical in appearance are museum property or other property depend on ultimate function, long-term preservation goals, and bureau mission. These materials must be managed consistently within each bureau, and each bureau must provide bureauwide policy.

While the following materials may share some characteristics of museum property, they are excluded from the definition of museum property:

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- a. Official records as defined by the National Archives and Records Administration (NARA) in 44 USC 3301 as follows: "Records include all books, papers, maps, and photographs, machine readable materials, or other documentary materials, regardless of physical form or characteristics, made or received by an agency of the United States Government under federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operation or other activities of the Government or because of the informational values of the data in them. Library and museum material made or acquired and preserved solely for reference or exhibition purposes, extra copies of documents preserved only for convenience of reference, and stocks of publications and of processed documents are not included."
- b. Books (e.g., library reference textbooks, journals, and magazines) unless collected for their physical attributes or associations rather than their intellectual content.
- c. Commercially mass produced posters, reprints, oil or acrylic paintings. (However, one set of a series of posters or reprints may be desirable.)
- d. Working collections which are specimens and samples that are consumed in analysis or that can be readily replaced; reference or working collections used for ongoing research that have not been processed or prepared to museum quality standards for long-term preservation and care, and are discarded upon completion of the project; and samples and specimens that do not appreciate in value, and are not rare or of public interest, and are discarded when no longer needed for current projects or business.
- e. Teaching and outreach and/or interpretive collections that are expendable.
- f. Mounts (i.e., birds and mammals) generated in the work of a bureau that have no scientific or historic

value.

- g. Photographs generated in the work of a bureau for short-term analysis, administrative reports, public information or education. These materials are official records.

B. DEPARTMENTAL POLICIES AND STANDARDS FOR PRESERVATION, PROTECTION, AND DOCUMENTATION OF MUSEUM PROPERTY

This section describes the basic standards for the preservation, protection, and documentation of Department of the Interior museum property and guidance for meeting those standards. The standards are to be applied by each bureau that manages museum property. These standards were originally issued on September 9, 1991, as interim standards. They have been revised, as necessary, and have been issued in the Departmental Manual (411 DM 2), "Museum Property Management" as final standards. Departmental standards are incorporated in this appendix to facilitate access by curatorial staff.

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Part 411 Museum Property Management

Chapter 1 General, Policy, and Responsibilities

411 DM 1.1

1.1 Purpose. This chapter provides organizational responsibilities and procedures for the management of museum property, and establishes policies and standards for the preservation, protection, and documentation of museum property.

The requirements prescribed in this chapter are applicable to all bureaus and offices that manage museum property. Although a bureau or office may have no museums, it may have property that has the characteristics of, and therefore shall be managed as, museum property. In addition to implementing the Departmental policies defined in this Part, each bureau may develop bureau-specific guidance and procedures on the preservation, protection, and documentation of museum property.

Materials that are determined not to be museum property must be managed as standard personal property, as records, or in a systematic manner established by governing laws, regulations, and bureau directives, as appropriate. These materials must be managed consistently within each bureau, and each bureau must provide a bureauwide policy.

1.2 Policy. The Department will ensure the preservation, protection, and documentation of museum property to facilitate resource management, research, interpretation, and accountability, and to ensure that museum property and associated information are available for present and future use.

1.3 Definition, Characteristics, and Identification of Museum Property.

A. Museum property is "an assemblage of museum objects collected according to some rational scheme and maintained so they can be preserved, studied, or interpreted for public benefit. Museum objects include prehistoric and historic objects, artifacts, works of art, archival documents, and natural history specimens that are part of museum collections. Elements, fragments, and components of structures are objects if they are no longer a part of the original structure. Museum property does not include those items necessary to display a collection such as exhibit cases, dioramas, special lighting, graphics, etc." (410 DM 114-60.100(n)); further,

B. Museum property includes archeological collections (objects, project-generated documentation, and laboratory and object documentation) as defined by 36 CFR Part 79, "Curation of Federally-Owned and Administered Archeological Collections");

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411 DM 1.3C

C. Museum property is defined by the bureau and/or unit mission, identified in part by its relationship to the bureau and/or unit's enabling legislation and/or program mission statements, and to unit-specific planning documents that define the mission of the unit;

D. Museum property is defined by the bureau and/or unit Scope of Collection Statement; and

E. Museum property may be identified by its characteristics, which may distinguish it from other kinds of property. These characteristics are not considered exclusive, and additional ones may be applicable. Likewise, not all museum property will have all of these characteristics. Cultural objects and natural history specimens may be considered museum property if they are maintained for public benefit (e.g., reference and exhibit) and meet one or more of the following characteristics:

(1) Are generated by research (e.g., archeological or natural science) on Federal lands or Indian lands, or through Federal funding or instrument, and are retained (i.e., not consumed in analysis);

(2) Tend to appreciate in value;

(3) Are antiques and/or fine art;

(4) Are associated with a significant event, resource, or eminent figure associated with the bureau;

(5) Are works commissioned by the bureau;

(6) Are of significant age (e.g., over 50 years);
and/or

(7) Are rare (e.g., one of a kind).

Additional definitions of terms related to the management of museum property can be found in appendix 2 of this chapter.

1.4 Exclusions. Non-museum property may share some characteristics of museum property; decisions on whether materials identical in appearance are museum property or other property will depend on the ultimate function of the property, long-term preservation goals, and bureau mission. The following are generally not considered to be museum property:

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411 DM 1.4A

A. Official records as defined by the National Archives and Records Administration (NARA) in 44 USC 3301 as follows:

"Records include all books, papers, maps, and photographs, machine readable materials, or other documentary materials, regardless of physical form or characteristics, made or received by an agency of the United States Government under federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operation or other activities of the Government or because of the informational values of the data in them. Library and museum material made or acquired and preserved solely for reference or exhibition purposes, extra copies of documents preserved only for convenience of reference, and stocks of publications and of processed documents are not included."

B. Books (e.g., library reference textbooks, journals, and magazines);

C. Commercially mass-produced oil or acrylic paintings, posters, or reprints. (However, one set of a series of posters or reprints may be desirable as museum property.);

D. Working collection specimens and samples that are consumed in analysis or that can be readily replaced; reference or working collections used for ongoing research that have not been processed or prepared to museum-quality standards for long-term preservation and care and will be discarded upon completion of the project; and samples and specimens that do not appreciate in value, are not rare or of public interest, and will be discarded when no longer needed for current projects or business;

E. Teaching and outreach and/or interpretive collections that are expendable;

F. Mounts (e.g., mammals and birds) generated in the work of a bureau that have no scientific or historic value; and

G. Visual images generated in the work of a bureau for short-term analysis, administrative reports, public information, or education. (These materials are official records.)

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411 DM 1.5

1.5 Objectives.

A. Ensure museum property and associated information is available for present and future use.

B. Ensure Departmentwide compliance with laws, regulations, and other guidance pertaining to museum property.

C. Ensure effective management, control, accountability, documentation, preservation, research, accessibility, and interpretation of museum property.

D. Establish standards for preservation, protection, and documentation of museum property.

E. Provide guidance for meeting Departmentwide museum property standards.

1.6 Authority. The following laws and implementing regulations set forth these responsibilities:

A. Act for the Preservation of American Antiquities, June 8, 1906 (16 USC 431-433);

B. "Preservation of American Antiquities," 43 CFR Part 3;

C. Reservoir Salvage Act of 1960, as amended (16 USC 469-469c);

D. Archeological and Historic Preservation Act of 1974 (16 USC 469-469c);

E. National Historic Preservation Act of 1966, as amended (16 USC 470-470t, sec. 110);

F. Archaeological Resources Protection Act of 1979, as amended (16 USC 470aa-mm), (ARPA);

G. Native American Graves Protection and Repatriation Act of 1990 (25 USC 3001-3013);

H. "Protection of Archaeological Resources," 43 CFR Part 7;

I. "Curation of Federally-Owned and Administered Archeological Collections," 36 CFR Part 79;

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- J. Federal Records Act of 1950, as amended ("Records Management by Federal Agencies" [44 USC 3101 et seq.]);
- K. "Federal Records; General," 36 CFR Part 1220;
- L. "Disposition of Federal Records," 36 CFR Part 1228;
- M. Preservation, Arrangement, Duplication, Exhibition of Records (44 USC 2109);
- N. "Disposal of Records," (44 USC 3301 et seq.);
- O. Federal Property Management Regulations (FPMR), 41 CFR Part 101;
- P. Interior Property Management Regulations (IPMR), 410 Departmental Manual 114-60; and
- Q. Information Resource Management, 380 Departmental Manual.

Additional laws, regulations, and conventions pertinent to museum collections appear in appendix 1 of this chapter.

1.7 Responsibilities.

A. The Assistant Secretary - Policy, Management and Budget has general oversight responsibility for the management of the Department's museum property.

B. The Director, Office of Acquisition and Property Management, is responsible for all policy aspects of Departmentwide administrative and management functions related to museum property. This includes:

- (1) Establishing policy and formulating appropriate recommendations for bureaus and offices;
- (2) Serving as Departmental liaison in dealing with other Government agencies;
- (3) Developing Departmentwide procedures;
- (4) Providing Departmental oversight, technical assistance, and training to bureaus and offices in preservation, protection, accessioning, cataloging, deaccessioning, utilization, control and accountability, and

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(5) Coordinating, consolidating, and analyzing museum property reports from the bureaus and offices; and,

(6) Promulgating and maintaining the Interior museum property directives and handbook.

C. All Assistant Secretaries shall ensure that the bureaus establish appropriate organizational arrangements and procedures, with adequate resources and appropriately qualified staff, to implement these Departmental requirements.

D. Heads of bureaus and offices shall be responsible for the preservation, protection, and documentation of museum property, and shall:

(1) Implement Departmentwide policy, guidelines, procedures, and programs to achieve standards;

(2) Designate personnel who possess knowledge in the methods and techniques pertinent to the preservation, protection, and documentation of museum property to implement the provisions of this chapter;

(3) Establish appropriate supplemental bureauwide policies, guidelines, and procedures related to museum property management;

(4) Disseminate management instructions regarding preservation, protection, and documentation of museum property;

(5) Review and approve bureauwide museum property management documents and data requirements;

(6) Determine bureauwide museum property training requirements and make recommendations for specific training appropriate to the size, nature, and complexity of the collections being curated;

(7) Ensure that official records needed to manage museum property are appraised and included in the records disposition schedule, and, as necessary, are certified to the Archivist of the United States as needed for current business;

(8) Review bureauwide fiscal programming for museum property-related activities and make recommendations that will ensure budgetary adequacy for management of museum property;

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(9) Ensure museum property-specialist(s) and discipline-specialist(s) (e.g., historian, archeologist, paleontologist, and biologist) review of planning documents affecting museum property;

(10) Ensure consultation with interested parties in accordance with the requirements of the National Historic Preservation Act of 1966, as amended, the Archaeological Resources Protection Act of 1979, as amended, and the Native American Graves Protection and Repatriation Act of 1990;

(11) Review and evaluate museum property operations throughout the bureau and make recommendations to field personnel concerning management, preservation, protection, and documentation of museum property;

(12) Ensure that utilization and disposal procedures are followed as outlined in 410 DM 114-60 and applicable regulations and directives, except as otherwise stated in this part (411 DM);

(13) As appropriate, establish Museum Property Committees or equivalent to advise on such aspects of museum property management as Scope of Collection Statements, accessions, deaccessions, loans, and establishment of required data appropriate to specific disciplines represented in the museum property collections; and

(14) Monitor the appropriateness of care given to bureau collections located at other institutions.

Additional Laws, Regulations
and Conventions
Pertinent to the Management
of Museum Property

- A. Lacey Act of 1900 (18 USC 43-44);
- B. Migratory Bird Treaty Act of 1918 (16 USC 703-711);
- C. Bald Eagle Protection Act of 1940 (16 USC 668-668d);
- D. Marine Mammal Protection Act of 1972 (16 USC 1361-1407);
- E. Endangered Species Act of 1973, as amended (16 USC 1531-1543);
- F. American Indian Religious Freedom Act of 1978 (42 USC 1996);
- G. 1970 UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property (implemented in the United States by P.L. 97-446 in 1983, [19 USC 2601]);
- H. 1983 Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)
- I. Additional laws, regulations, and conventions specific to individual bureaus

**Definitions of Terms Related to
the Management of Museum Property**

The terms listed below relate to the management of museum property and are used extensively in 411 DM.

A. "Accessioning" (property management term is "acquisition") is defined as a transaction whereby one or more objects and/or specimens is or are acquired in the same manner from one source at one time for the museum property collection. Accessioning is the process of formally accepting and establishing permanent legal title (ownership) and/or custody for an object or specimen or group of objects and/or specimens.

B. "Accountable Officer" is defined as "a bureau or office employee designated as responsible for ensuring establishment and maintenance of property accountability records, to provide for effective control over property assigned to a particular organizational entity..." (410 DM 114-60.100).

C. "Appraisal" is the process by which the National Archives and Records Administration (NARA) determines the value and thus the final disposition of Federal records, making them either temporary or permanent (36 CFR Part 1220); the practice of an expert assigning a monetary value to museum property for a specific management purpose (e.g., to designate controlled museum property, or in preparation for an exchange, loan, or deaccession).

D. "Associated Records" is defined as all documentation generated by the activity of collecting and analyzing artifacts, specimens, or other resources that are or subsequently may be designated as museum property, such as site forms, field notes, drawings, maps, photographs, slides, negatives, films, video and audio cassette tapes, oral histories, artifact inventories, laboratory reports, computer cards and tapes, computer disks and diskettes, printouts of computerized data, manuscripts, and reports. These records are "associated" with objects and specimens generated during such activities. See also definition in 36 CFR Part 79. These records are needed to effectively manage museum property collections and should be maintained as part of those collections. Because these are museum materials maintained solely for reference or exhibition purposes, they are excluded from official records as defined by the National Archives and Records Administration in 44 USC 3301. (See "Resource Management Records.")

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E. "Authorized Parties" are defined as the persons representing one or more entities, either within or outside the Federal Government, who have authority to act on behalf of their institutions.

F. "Cataloging" (the property management term is "identification") is defined as the action of assigning and applying a unique identifying catalog number to an object or specimen or group of objects and/or specimens and completing written documentation.

G. "Controlled property" is defined as an individual object or a cataloged "lot" of objects that is especially sensitive; has high intrinsic or scientific value; is especially vulnerable to theft, loss, or damage; or is valued at or above a threshold value established by each bureau; or is a museum firearm. The catalog record must indicate that it is controlled museum property. For the purpose of inventory, short-term incoming loans are treated like controlled property.

H. "Curatorial staff" is defined in a generic sense to refer to persons in each bureau who have direct responsibility for museum property management. Museum property management may be carried out by museum curators, museum specialists, and museum technicians, or it may be carried out by property management specialists, rangers, archeologists, historians, resource management specialists, interpreters, or others as a collateral duty.

I. "Deaccessioning" (the property term is "disposal") is defined as the formal procedure whereby objects and/or specimens are permanently removed from the museum property collection. Examples of deaccessions are exchanges, transfers, and losses.

J. "Designated authority" is defined as person(s) identified by a bureau who shall have training appropriate to the size, nature, and complexity of the collection being managed to make accessioning and deaccessioning decisions based on a comprehensive knowledge of the methods and techniques pertinent to the preservation, protection, and documentation of museum property. The designation as museum property management official may or may not correspond to the individual's official job title. It may be appropriate for an organizational unit to have more than one designated authority for museum property management if the size and scope of the museum property collection managed by the unit preclude regular review of the museum property by one designated authority.

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K. "Discipline classification type" is defined as a method of organizing museum property collections into separate disciplines to provide a systematic filing scheme from which data may be retrieved. Discipline classification types used in the Department of the Interior include archeology, Native American (ethnographic), artwork, historic objects, historic and/or scientific documents, biology--plants, biology--animals, paleontology, geology, and environmental samples.

L. "Indian lands" has the same meaning as in section -.3 (e) of uniform regulations 43 CFR Part 7, 36 CFR Part 296, 18 CFR Part 1312, and 32 CFR Part 229. The Archeological Resources Protection Act definition states that "Indian lands means lands of Indian tribes, or Indian individuals, which are either held in trust by the United States or subject to a restriction against alienation imposed by the United States, except for subsurface interests not owned or controlled by an Indian tribe or Indian individual." Consult appropriate statutes and regulations for definitions that apply to bureau-specific collections.

M. "Loans, incoming" are defined as temporary assignments of objects and/or specimens that are in the custody of the bureau, on either a short-term or long-term basis, to further the bureau's goals of preservation, interpretation, and research. Incoming loans cover objects and/or specimens for which a unit has responsibility and custody, but not ownership. Incoming loans involve temporary legal custody changes but not a change in ownership or title, and are covered by an incoming loan agreement, cooperative agreement, or similar instrument. Such instruments include the following: conditions of the loan, address, the handling, shipping, and insurance arrangements, and the initiation and termination dates. Agreements are signed by authorized parties of both the borrower and the lender.

N. "Loans, outgoing" are defined as temporary assignments of objects and/or specimens to other parties, on either a short-term or long-term basis, in order to further the goals of preservation, interpretation, and research. Outgoing loans involve temporary legal custody changes but not a change in ownership or title, and are covered by an outgoing loan, cooperative agreement, or similar instrument. Such instruments include the following: conditions of the loan, address, the handling, shipping, and insurance arrangements, and the initiation and termination dates. Agreements are signed by authorized parties of both the borrower and the lender.

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O. "Museum Property Preservation" is defined as the action taken to prevent damage and to minimize deterioration of museum property by practicing "preventive conservation" or by performing a suitable treatment on an object itself.

P. "Museum Records" are defined as official records that are generated by the museum property system to manage museum property (e.g., accession, catalog, loan, and inventory records). As agency records, these records must be appraised through agency record schedule procedures, and, as necessary, certified to the Archivist of the United States that they are needed for current business.

Q. "Preventive Conservation" employs non-interventive actions(s) to prevent damage to and to minimize deterioration of objects and associated data. Such actions include monitoring and controlling environmental agents (e.g., light, relative humidity, temperature, air pollution, and pests); practicing proper handling, storage, exhibit, and packing and shipping techniques; implementing an ongoing housekeeping program in all space housing museum property; and preparing and implementing emergency management plans for museum property.

R. "Resource Management Records" are documentation such as site forms, field notes, drawings, maps, photographs, slides, negatives, films, video and audio cassette tapes, oral histories, artifact inventories, laboratory reports, computer cards and tapes, computer disks and diskettes, printouts of computerized data, manuscripts, and reports made or acquired by the Federal Government to record information on cultural and natural resources for the purposes of reference or exhibition and for preservation of the Nation's natural and cultural heritage. These records may or may not be specifically associated with other museum property. If associated with other museum property (e.g., artifacts, specimens, or other objects) they are also known as "associated records." They are excluded from the National Archives and Records Administration definition of official records because they qualify as "library and museum materials made or acquired and preserved solely for reference or exhibition purposes..." (44 USC 3301). (See "Associated Records.")

S. "Scope of Collection Statement" is defined as the basic museum property planning document that is required for all Department of the Interior bureaus. Each unit having or expecting to have museum property must have an approved Scope of Collection Statement. The document guides a unit in the acquisition of those museum objects and specimens that

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contribute directly to the mission of the unit, as well as those additional objects that the bureau is legally mandated to preserve.

T. "Unit" is defined as a bureau organizational entity (e.g., administrative unit, office, park, center, laboratory, repository, site, refuge, or accountability area).

U. "Working collections" include initial organic and inorganic raw materials collected for survey and assessment activities, and may or may not be further processed, and may or may not contain specimens that will become museum property. Certain collections of specimens made for teaching and identification purposes also may be considered working collections. Materials in working collections are gathered for a specific function that facilitates a program or project and are not intended to confirm or corroborate any identification or natural history information related to the specimens or samples themselves or to the locality where they were collected. Factors that distinguish working collections from museum property collections include the need to maintain information regarding the specimens themselves and the localities they represent, and the need for long-term preservation of the specimens to verify that information.

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Standards for
Chapter 2 Museum Property Management

411 DM 2.1

2.1 Purpose. This chapter outlines priorities and establishes standards for managing museum property. Advice and information to assist bureaus in museum property management is provided in the Departmental Museum Property Handbook, 411 DM Volume I and Volume II. 411 DM Volume I addresses preservation and protection of museum property, and 411 DM Volume II addresses documentation of museum property. These handbook volumes do not contain mandated requirements other than those outlined in 411 DM.

2.2 Priorities. These standards apply to all museum property. Priority shall be given to museum property that is of high scientific, intrinsic, cultural, or monetary value; highly vulnerable in terms of the environment; sensitive in terms of subject matter; or mandated by Federal law and/or bureau-specific authorities. In bringing the management of museum property up to the standards stated in this part (411 DM), priority shall be given to museum property housed in Federal facilities.

2.3 Standards. Standards for managing museum property are based on Departmental policy and on professional museum practices. The standards apply to all Departmental museum property. When standards cannot be attained, managers shall justify the reasons in writing, assess the resulting risks, and take actions to compensate for identified weaknesses to minimize the chances of environmental deterioration, damage, loss, and misuse of museum property. The written justification must be approved by a designated reviewing official.

A. Planning Standards. Bureau-approved museum property management documents include:

(1) At the bureau level, a collection management policy outlining the rationale for bureauwide management of museum property that shall:

(a) Establish standards of care for museum property including preservation, protection, and documentation; and

(b) Ensure museum property-specialist(s) and discipline-specialist(s) review of planning documents affecting museum property.

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(2) At the unit level, the following documents are required. Documents (a) through (c) below shall be stand-alone. Documents (d) through (g) may be stand-alone or, for small collections, may be incorporated as statements into other related unit-planning documents.

(a) A Scope of Collection Statement outlining the parameters of collecting activities and defining the purpose of the museum property collection, setting agreed-upon limits on collecting, and considering the uses of the collection;

(b) A Museum Property Survey documenting the types and numbers of museum objects and/or specimens held by the unit, their location, and their general status, and assessing the status of their documentation and accountability; mandatory data for the museum property survey are described in 411 DM 3.3B;

(c) A Checklist for Preservation, Protection, and Documentation of Museum Property, which is designed as a tool to assist bureaus in conducting self-assessments of the status of preservation, protection, documentation, and accountability of museum property in bureau custody, and in identifying deficiencies measured against Departmental standards. The required checklist is exhibited in the Museum Property Handbook (411 DM Volume 1, Appendix E); and

(d) A Collection Management Plan to assist in the proper preservation, protection, and documentation of museum property, including:

1. Problem statement(s);
2. Description(s) of action(s) to be taken and identification of the responsible party(ies);
3. List of actions in priority order; and
4. Cost estimate(s) that include or trigger appropriate bureau-specific programming and budgeting documents that will be inserted in the bureau's programming process;

(e) An Emergency Management Plan for museum property that identifies vulnerabilities to hazards and details ways of responding to and controlling them;

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(f) An Integrated Pest Management Program that assesses threats to museum property by pests and identifies strategies to control them; and

(g) A Conservation Survey, as needed, that provides information on the environmental parameters of spaces housing museum property, records the condition of individual or groups of museum materials, determines conservation treatment needs and priorities, and records baseline data for future assessment of deterioration.

B. General Preservation and Protection Standards. All museum property in storage and exhibit spaces shall be:

(1) Housed according to the specific environmental needs and vulnerabilities of individual materials as follows:

(a) Environmental conditions shall be monitored regularly to assess the status of spaces housing museum property relative to standards established in this chapter;

(b) Preservation measures shall include controlling light levels, relative humidity, temperature, airborne pollutants, and pests; proper storage and exhibit techniques; proper housekeeping procedures; and proper handling techniques;

(2) Protected by security and fire protection measures appropriate to that property and to the structure in which it is housed;

(3) Examined on a scheduled basis to detect evidence of deterioration, with the results of such physical examination documented; and

(4) Treated to stabilize condition, as necessary, in accordance with professional conservation standards and practices.

C. Specific Preservation and Protection Standards. Museum property in storage or on exhibit shall be subject to the following standards (see section E for standards pertaining to museum property in Administrative Office space):

(1) Environment. Museum property and associated documentation shall be housed in a safe, stable environment, appropriate to the material type, to reduce its rate of deterioration, prolong its life, and minimize the need for

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conservation treatment. Relative humidity and temperature shall be monitored and controlled to minimize wide fluctuation over short periods of time and to avoid harmful extremes. It is essential that the decision-making process for controlling relative humidity and temperature support the goals of energy conservation. Light levels shall be monitored and recorded. Exposure of museum property to visible light must be limited in illuminance level and duration. Ultraviolet (UV) radiation from daylight and artificial light must be eliminated to the extent possible. Regularly scheduled inspections for evidence of insect and other pests must be conducted and documented, and appropriate action must be taken when an infestation is discovered. Storage and exhibit areas shall be free from as much particulate matter and gaseous pollutants as is practical. Specific standards for temperature, relative humidity, light, pests, and air pollution follow:

(a) Temperature. In exhibit and storage spaces where human comfort is a factor, the recommended levels are 21°C to 23°C (70°F to 74°F). In storage spaces where human comfort is not a factor, the temperature level for mixed collections may be gradually reduced to a cooler level, provided that the relative humidity level does not cause condensation on cold surfaces. The upper limit shall not exceed 24°C (75°F). Abrupt changes in temperature must be avoided.

(b) Relative Humidity (RH). Relative humidity shall be monitored and recorded. Relative humidity levels shall be maintained at stable levels to avoid extreme levels and wide fluctuations. Acceptable ranges and limits of relative humidity must be established for each unit, based on the local climate, the nature and condition of the materials constituting the collection, the RH levels to which the materials have been acclimatized, the structure housing museum property, and other relevant factors. Ideally, fluctuations should not exceed ±3% RH per month. Relative humidity levels shall be maintained below 65% RH to reduce the potential for mold growth and above 35% RH to maintain the moisture content of organic materials. Data must be recorded daily for 1 year before establishing acceptable ranges and limits.

(c) Light (visible). Levels of visible light shall be monitored and recorded in exhibit and storage spaces. When light-sensitive objects and/or specimens are illuminated, the levels and duration of visible light shall be controlled. The maximum acceptable illuminance levels for light-sensitive materials shall be as follows:

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- (i) 50 lux (5 foot-candles) for especially light-sensitive materials (e.g., dyed and treated organic material, textiles, watercolors, tapestries, prints and drawings, manuscripts, leather, wallpapers, natural history specimens such as botanical specimens, fur and feathers, and certain types of photographs [e.g., films such as albumen and cyanotypes]).
- (ii) 200 lux (20 foot-candles) for undyed and untreated organic materials, oil and tempera paintings, and finished wooden surfaces.
- (iii) Generally, other materials are less sensitive to light and may be exposed to higher levels, up to a maximum of 300 lux (30 foot-candles). However, when these materials are housed with light-sensitive materials, light levels must be controlled at levels appropriate for the most sensitive materials.
- (iv) Except for short durations required for access or housekeeping, no light is acceptable for museum property in storage.

(d) Light (ultraviolet radiation). All light sources for ultraviolet radiation (UV) shall be monitored and recorded. If the UV radiation level exceeds 75 microwatts per lumen, it is mandatory to control it by installing UV-filtering material between the light source and museum property. Ultraviolet radiation shall be periodically monitored and recorded to ensure that the filtering material is effective.

(e) Pests. An Integrated Pest Management (IPM) Program shall be implemented in all spaces housing museum property to protect the property from pest damage and to reduce the amount of pesticides used.

(f) Air Pollution. As appropriate, gaseous and particulate pollution shall be monitored and recorded. Levels

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(2) Security. Storage and exhibit spaces must be secured against unauthorized entry. Access to the locked storage area must be limited to the curatorial staff and those people who have a legitimate reason to enter. A visitor and researcher sign-in log must be established to record visitor name, address, the date and time entered, the time left, and the reason for entering. Written procedures must be adequate to control access to and use of keys and combinations. Opening and closing procedures shall be written and implemented for storage and exhibit spaces. Written policies and procedures for access to museum property and associated records shall be prepared and implemented. As required, an appropriate combination of mechanical and electronic systems shall be in place. The special needs of the museum property shall be addressed in an emergency management plan. As appropriate, a separate emergency management plan for museum property shall be written and implemented.

(3) Fire Protection. Equipment and/or systems appropriate to the nature of museum property in the space it occupies shall be installed to provide for the detection and suppression of fire. Structures and spaces housing museum property shall be made fire-resistant to the extent possible given the nature of the structure. Museum records shall be stored in an appropriate fire- and burglary-resistant locking container or vault that shall be locked when not in use. The fire prevention, detection, and suppression needs of museum property shall be addressed in a fire plan. Flammable liquids shall not be stored in the museum property storage area.

(4) Housekeeping. Housekeeping in museum property storage and exhibit spaces shall be performed according to an established schedule. Smoking, drinking, and eating shall be prohibited in writing. General rules and procedures shall be written to provide guidance on handling and housekeeping. Relative humidity- and temperature-monitoring equipment shall be calibrated quarterly. If a hygrothermograph is used to monitor relative humidity and temperature, it shall be regularly maintained.

D. Spaces Housing Museum Property. Additional museum property standards specific to the following types of space include:

(1) Storage. Safe and secure storage of museum property requires dedicated space. Space(s) designated for storage shall accommodate existing museum property and be large enough to allow for reasonably anticipated growth in collection

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size. All newly constructed and remodeled museum property storage space must provide dedicated space and accommodate such growth. All existing space should meet this standard to the fullest extent possible.

Organization of the storage space shall allow for the efficient use of storage equipment and techniques and provide for effective access to, and optimum preservation of, museum property. Museum property shall be housed in appropriate equipment and containers and packaged with appropriate museum-quality materials. Storage spaces in high-risk earthquake zones shall employ materials and techniques that protect museum property from damage due to shock or vibration. Standards set forth in 411 DM 2.3C(1) through (4) above apply to museum property in storage.

(2) Exhibits. It is recognized that objects and specimens on exhibit are more vulnerable to deterioration, theft, and vandalism than objects in storage. Museum property shall be exhibited in a manner that minimizes such risks. Exhibit planning must ensure that preservation, protection, and maintenance needs of museum property are addressed. Exhibit cases shall be designed and fabricated in a manner that ensures the security and preservation, and facilitates the maintenance, of museum property.

Freestanding museum objects and/or specimens shall be protected by an appropriate combination of physical, electronic, and staffing methods. Environmentally sensitive objects and/or specimens shall be rotated on a scheduled basis to minimize deterioration. When necessary, mounts constructed of museum-quality material shall be used to support objects and/or specimens. Standards set forth in 411 DM 2.3C(1) through (4) above apply to museum property on exhibit.

E. Preservation and Protection Standards Specific to Administrative Office Space. Museum property displayed in administrative office space shall meet basic preservation and protection requirements as follows:

(1) Security and Fire Protection. Keys to office space and display cases shall be controlled. Opening and closing procedures shall be written and implemented. Written instructions shall be established to provide guidance on the safe and secure evacuation of museum property that is at risk because of an impending disaster. Security against unauthorized entry to office space housing museum property shall be established. Policies and procedures on fire

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prevention, detection, and suppression for museum property shall be included in a facility fire plan. Written policies and procedures for access to and movement of museum property shall be prepared and implemented. Smoking shall be prohibited in offices housing museum property.

(2) Environment. Levels of relative humidity and temperature shall be monitored, recorded, evaluated, and controlled, to the extent possible, to minimize rapid fluctuations and avoid harmful extremes. Ultraviolet radiation shall be monitored and controlled to the standard required by 411 2.3C(1)(d). To the extent practical, visible light shall be monitored and controlled to the standard required by 411 DM 2.3C(1)(c). Space and materials shall be monitored for pest infestations, and pest control actions shall be in accordance with the Departmental pesticide policy outlined in 517 DM.

(3) Display Techniques. Two-dimensional artwork shall be properly secured in a frame with a protective backing. Watercolor paintings, prints, and drawings shall be matted with archival-quality material and protected by glass or other appropriate material. Museum property shall be displayed in areas that provide protection from accidental damage. Museum property shall not be used for secondary functions. Tapestries shall be hung so that their weight is evenly distributed. Metals and untreated wood shall not be in contact with the tapestry. General rules and procedures shall be written to provide guidance on handling and housekeeping.

F. General Documentation Standards. All museum property shall be:

- (1) Documented with a transfer of title and/or custody signed by authorized parties;
- (2) Accessioned;
- (3) Cataloged (as appropriate to discipline);
- (4) Subject to established lending policies and procedures pertaining to incoming and outgoing loans;
- (5) Documented by a Report of Survey in the event of loss, theft, damage, destruction, or abandonment (410 DM 114-60.8);

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(6) Subject to established deaccessioning policies and procedures specific to museum property; and

(7) Documented in an information system containing the mandatory data for each activity described in 411 DM 2.3G. It is recommended that mandatory data be supplemented with data, appropriate to the discipline, selected from the "Highly Recommended Data" section in the optional data appendices (L through P) in 411 DM Volume II. Museum records that are needed for current business by the unit or bureau must be retained.

G. Specific Documentation Standards.

(1) Accessioning. Accessioning is the process of formally accepting and establishing legal title and/or custody for an object or specimen or group of objects and/or specimens. Museum property may be accessioned (i.e., added to the collection) by means of donation, purchase, exchange, transfer, or field collection. Accessioning is required by 410 DM 114-60.200(a)(1). All accession actions shall be reviewed and approved by the designated authority. Accessioning standards include:

(a) A single accession transaction shall record the acquisition of one or more object(s) and/or specimen(s) in the same manner, from one source at one time, for the museum property collection;

(b) Restrictions on the future use of acquisitions shall not be accepted unless approved in writing by the designated authority;

(c) A transfer of title (ownership) and/or custody signed by authorized parties is mandatory;

(d) Transfer of copyright must be included where appropriate;

(e) A bound archival accession book, an accession form, an accession receiving report or equivalent, and an acid-free accession folder are mandatory. An exception to the use of a bound archival accession book is allowed, if, instead, the catalog records (411 DM 2.3G(2)) are recorded sequentially in a bound archival book, as is common with natural history collections;

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(f) Mandatory data shall be recorded for each accession in the accession book or in supplementary documents filed in the accession folder. If they are filed elsewhere, their locations shall be noted in the accession folder; and

(g) Mandatory Data for Accessions:

- a. Accession number
- b. Source of accession (individual), or
- c. Source of accession (institution) and responsible official
- d. Address of source of accession
 - Box or Street
 - City
 - State
 - Zip
 - Country if other than the United States
 - Telephone number
- e. Date received
- f. Accession date
- g. Accession type
- h. Description
- i. Project name (as appropriate)
- j. Catalog number(s) within the accession
- k. Item total
 - Actual
 - Estimate
 - Bulk count

(2) Cataloging. Cataloging shall ensure that museum property is placed within the appropriate disciplinary, classificatory, or typological context. Cataloging is required by 410 DM 114-60.200(a)(1). Cataloging standards include:

(a) Catalog documentation shall include the recording of physical description, associations with people, resources, or events, interpretive and research data about object(s) and/or specimen(s), and museum property management data (e.g., physical location and item count);

(b) Objects and specimens shall be cataloged as appropriate to the discipline;

(c) A unique identifying catalog number shall be assigned to an object and/or specimen or group of objects and/or specimens, and written documentation shall be completed;

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(d) All categories for which data are available must be completed; mandatory categories for which information is not available or not appropriate must be completed as "unknown" or "not applicable;" and

(e) Mandatory Data for Cataloging.

For all Museum Property:

- a. Accession number
- b. Catalog number
- c. Discipline classification type
- d. Object and/or specimen name
- e. Unit acronym and/or identifier
- f. Controlled property
- g. Item count
 - Item count
 - Lot
 - Bulk item count
- h. Current location
- i. Description
- j. Condition
- k. Date cataloged

For Cultural Resources (Archeology Only):

- a. Site of original collection and/or provenience
 - Field site number
 - State site number
 - Site name or other identification
 - Within-site provenience
 - UTM coordinates, or
 - Latitude and longitude, or
 - Township/range/section
 - Collection unit
 - Place name
 - County
 - State
 - Country

For Natural History Specimens:

- a. Type specimen (if designated)
- b. Collection locality
 - Collection locality name
 - UTM coordinates, or
 - Latitude and longitude, or

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Township/range/section

Collection unit

Place name

County

State

Country

c. Collector

d. Collector's number

e. Collection date

f. Preservative and/or preparation

(3) Incoming Loans. Incoming loan documentation standards include:

(a) Each incoming loan in a bureau's custody shall be assigned a unique number and documented by an incoming loan agreement, cooperative agreement, memorandum of agreement, or similar instrument; a system of tracking (e.g., a bound archival book) is required;

(b) All incoming loan agreements must be signed by authorized parties of both the borrower and the lender;

(c) Conditions of shipping, handling, and insurance must be addressed in the loan agreement;

(d) An itemized list of museum property shall be included with the loan agreement;

(e) All incoming loan agreements shall be stored in acid-free folders; and

(f) Mandatory Data for Incoming Loan Agreements:

a. Incoming loan number

b. Incoming loan type
Short-term incoming loan, or
Long-term incoming loan

c. Purpose of loan
Exhibit
Study
Conservation
Exhibit preparation
Curation
Storage
Other

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- d. Lender
 - Lender name (individual), or
 - Lender name (institution)
 - Lender address
 - Box or street
 - City
 - State
 - Zip
 - Country if other than the United States
 - Telephone number
 - Responsible official
- e. Receiving unit
 - Receiving unit name
 - Receiving unit address
 - Box or street
 - City
 - State
 - Zip
 - Telephone number
 - Responsible official
- f. Transaction dates
 - Date of incoming loan agreement
 - Termination date of incoming loan agreement
 - Initiation date of incoming loan
 - Return date of incoming loan
- g. Objects and/or specimens in loan
 - Catalog number(s) (lender's)
 - Item count
 - Object or specimen name
 - Description
 - Condition
 - Value
- h. Credit line for lender
- i. Insurance
 - Waived
 - To be carried by lender
 - To be carried by receiving unit
 - Certificate of insurance
 - Waiver of subrogation
- j. Packing and shipping
- k. Incoming loan return status
(partial or complete)

(4) Other Temporary Custody. An object and/or specimen temporary custody receipt (411 DM Volume II, Chapter 2) shall be used when the bureau holds museum property

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in temporary custody (e.g., for purposes of identification, review for possible donation, or examination for purchase). Temporary custody standards include:

(a) The receipt shall be used only for short-term custody without insurance;

(b) Each bureau shall set a time limit for short-term custody; and

(c) The receipt shall be signed by authorized parties of both the borrower and lender.

(5) Outgoing Loans. Outgoing loan documentation standards include:

(a) Each outgoing loan shall be assigned a unique number and documented by an outgoing loan agreement; A system of tracking (e.g., a bound archival book) is required;

(b) Only cataloged museum property shall be lent to institutions for short-term outgoing loans;

(c) Outgoing loans shall not be made to individuals;

(d) Conditions for shipping, handling, and insurance must be addressed in the loan agreement;

(e) An itemized list of museum property must be included in the loan agreement;

(f) All agreements must be signed by authorized parties of both the borrower and lender;

(g) All agreements shall be stored in acid-free outgoing loan folders;

(h) In compliance with 36 CFR 1228.76, bureaus shall seek blanket approval from the Archivist of the United States for all loans of permanent records to non-Federal recipients;

(i) Museum property shall be lent for official purposes only;

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(j) Museum property may not be used for commercial purposes or private pecuniary gain except where specifically authorized by the bureau; and

(k) Mandatory Data for Outgoing Loan Agreements:

- a. Outgoing loan number
- b. Outgoing loan type
 - Short-term outgoing loan, or
 - Long-term outgoing loan
- c. Purpose of loan
 - Exhibit
 - Study
 - Conservation
 - Exhibit preparation
 - Curation
 - Storage
 - Other
- d. Borrower
 - Borrower institution (department)
 - Borrower name (institution)
 - Borrower address
 - Box or street
 - City
 - State
 - Zip
 - Country if other than the United States
 - Telephone number
 - Responsible official
- e. Lending unit
 - Lending unit name
 - Lending unit address
 - Box or street
 - City
 - State
 - Zip
 - Country
 - Telephone number
 - Responsible official
- f. Transaction dates
 - Date of outgoing loan agreement
 - Termination date of outgoing loan agreement
 - Initiation date of outgoing loan
 - Return date of outgoing loan

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- g. Objects and/or specimens in loan
 - Catalog number
 - Item count
 - Object and/or specimen name
 - Description
 - Condition
 - Value
- h. Credit line from lending unit
- i. Insurance
 - Waived
 - To be carried by lender
 - To be carried by borrower
 - Certificate of insurance
 - Waiver of subrogation
 - Other
- j. Packing and shipping
- k. Outgoing loan return status
(partial or complete)

(6) Deaccessioning. Bureaus with disposal authority for museum property shall comply with these deaccession procedures. Reports of Survey may lead to deaccessioning. Deaccessioning standards include:

(a) All deaccession actions shall hold to the principles of 41 CFR 101-43 to 101-46, which address utilization, donation, sale, abandonment, destruction, and disposal of personal property;

(b) All objects and/or specimens proposed for deaccessioning must be cataloged, as appropriate to the discipline, before being deaccessioned according to procedures outlined in the Departmental Museum Property Handbook (411 DM Volume II, chapter 6);

(c) Each deaccession shall be assigned a unique number and shall be documented by an appropriate deaccession form, a deaccession folder, and a bound archival deaccession book, all of which will be permanently maintained at the unit or at a location designated by the bureau;

(d) All deaccessioning actions must be reviewed, approved, and signed by the designated authority(ies); Refer to 411 DM 1.7.D(12) and 410 DM 114-60.8;

(e) All proceeds that are available to the bureau from deaccession actions must be used for acquisition of additional museum property;

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(f) Deaccessioning Ethics:

(i) Deaccessioned bureau museum property (or financial interest therein) shall not be acquired by any bureau employee, nor shall any employee appear to benefit personally in any way as a result of a deaccession action and subsequent disposition;

(ii) Deaccessioning shall be conducted in a manner that precludes any real or apparent conflict of interest, as defined and described in Department of the Interior regulations on "Employee Responsibilities and Conduct" (5 CFR Part 2635 and related supplement); and

(g) Mandatory Data for Deaccessioning:

- a. Deaccession number
- b. Listing of catalog numbers and object and/or specimen names
- c. Item count of objects and/or specimens
- d. Value of each object or specimen
- e. Designated authority name
- f. Deaccession approved or disapproved
- g. Date deaccession approved or disapproved
- h. Disposition
- i. Disposition approved or disapproved
- j. Date disposition approved or disapproved
- k. Date deaccessioned

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Chapter 3 Procedures, Reports, and Forms

411 DM 3.1

3.1 Purpose. This chapter establishes mandatory procedures and reports for museum property management and introduces sample forms for use by the bureaus in developing bureau-specific forms.

3.2 Procedures. The following procedures are mandatory for spaces housing museum property. Refer to the Departmental Museum Property Handbook, 411 DM Volume I and Volume II, for additional information regarding these procedures.

A. Preservation and Protection:

- (1) Opening and closing procedures;
- (2) Key and combination control procedures;
- (3) Access procedures to museum property and associated records; and
- (4) Integrated Pest Management Program.

B. Documentation:

- (1) Accessioning;
- (2) Cataloging;
- (3) Incoming and outgoing loan recordation; and
- (4) Deaccessioning, as appropriate.

3.3 Reports. In addition to the inclusion of museum property in reports required by 410 DM 114-60, the following reports shall be submitted by the bureau to the Director, Office of Acquisition and Property Management, on schedules as noted for each report:

A. Checklist Report on the Preservation, Protection, and Documentation of Museum Property. This report is:

- (1) A bureauwide summary of the data from the required Checklist for the Preservation, Protection, and Documentation of Museum Property as completed by each unit [refer to 411 DM 2.3A(2)(c)]; and
- (2) Submitted every 4 years on March 1, beginning in 1996;

B. Museum Property Survey Report. This report must:

- (1) Provide a status report of transactions affecting museum property that occur within one fiscal year;

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- (2) Record, at a minimum, the following information:
- (a) Number of accessions and accession types;
 - (b) Number of objects and/or specimens acquired;
 - (c) Number of objects and/or specimens cataloged, by discipline [i.e., archeology, Native American (ethnographic), artwork, historic objects, historical and/or scientific documents, biology--plants, biology--animals, paleontology, geology, and environmental samples];
 - (d) Number of incoming and outgoing loans and total number of objects and/or specimens in each category;
 - (e) Number of deaccession transactions (regardless of value) and total number of objects and/or specimens deaccessioned by discipline;
 - (f) Number of historical firearms acquired;
 - (g) Number of items receiving conservation treatment;
 - (h) Number of objects and/or specimens to be cataloged, by discipline, for all years (backlog);
 - (i) Number of objects and/or specimens cataloged, by discipline, for all years;
 - (j) Total number of objects and/or specimens in the collection; and
- (3) Be submitted annually by June 30 following the fiscal year reported.

3.4 Inventory Reconciliation and Certification:

A. Inventory. Property inventories are required by 410 DM 114.60.3. Bureaus shall physically verify, or verify in writing through appropriate instruments, the presence and condition of museum property listed in the inventory for property located in both Federal and non-Federal repositories. The following annual inventories are required:

- (1) 100% inventory of all controlled museum property;

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(2) A random sample inventory of all other cataloged museum property, unless the collection has fewer than 250 cataloged objects and/or specimens, in which case a 100% inventory is required; and

(3) 100% inventory, by accession number, of all accessioned but as yet uncataloged museum property, unless the collection has 250 or more uncataloged accessions, in which case a random sample may be used.

(4) If the inventory of property indicates that a substantial loss has occurred or a significant number of items are unaccounted for, a 100% inventory of all museum property may be required.

B. Mandatory Inventory Requirements. An inventory must verify:

- (1) Location
- (2) Catalog number (or accession number as appropriate)
- (3) Object and/or specimen presence
- (4) Record presence
- (5) Information accuracy
- (6) Condition

C. Annual Inventory Reconciliation. Museum property is subject to the same annual inventory reconciliation as described in 410 DM 114-60.303, except that reconciliation of the museum property records to a general ledger account is not applicable. Items found during the inventory, but not previously listed in the inventory records, must be added to the inventory in accordance with 411 DM 2.3F and 2.3G. If missing museum property is not recovered or found, the following actions are needed:

- (1) Process Reports of Survey (DI-103) in compliance with 410 DM 114-60.8;
- (2) Initiate the deaccession of material, as appropriate, on completion of Board of Survey action; and
- (3) The Department of the Interior Inspector General may be requested to investigate the situation in accordance with 355 DM 2 and 410 DM 114-60.811.

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D. Annual Inventory Certifications. Certification in writing is required to the bureau Property Management Officer that physical inventories of museum property have been completed and reconciled in accordance with 410 DM 114-60.304 and 411 DM 3A, B, and C above.

3.5 Forms.

A. The Museum Property Handbook, 411 DM Volume I and Volume II, contains sample forms that may be pertinent to museum property management in the Department; and

B. Bureau-specific forms may be developed by individual bureaus to supplement or to adapt sample forms illustrated in 411 DM Volume I and Volume II.

C. MANDATES FOR MUSEUM PROPERTY MANAGEMENT

The laws and regulations that provide the basic legal mandate for the Department of the Interior to undertake museum property management are as follows:

Act for the Preservation of American Antiquities of June 8, 1906 (16 USC 431-433)

Authorizes the President to declare national monuments to protect sites and objects; authorizes Federal departments to grant permits for survey and excavation and to enforce protection of archeological sites and objects under their jurisdiction; and requires that materials excavated be permanently preserved in public museums.

43 CFR Part 3 "Preservation of American Antiquities"
(implementing regulations for the Antiquities Act)

Section 3.16 authorizes Federal land managers to seize materials recovered illegally from archeological resources located on lands owned or controlled by the United States, and dispose of the materials by depositing them in the proper national depository or otherwise. Section 3.17 requires that every collection recovered under the Antiquities Act be preserved in the public museum designated in the Antiquities Act permit, and be accessible to the public. The Secretary of the Smithsonian Institution must approve of the transfer of an Antiquities Act collection, which may only be transferred to another public museum, and be accessible to the public. If the repository ceases to exist, the Antiquities Act collection shall revert to the national collections and be placed in the proper national depository.

Reservoir Salvage Act of 1960, as amended (16 USC 469-469C)
(See Archeological and Historic Preservation Act 1974 listed below.)

Provides for the recovery and preservation of "historical and archeological data (including relics and specimens)" that might be lost or destroyed as a result of the construction of dams and reservoirs.

Archeological and Historic Preservation Act of 1974 (16 USC 469-469C) (See Reservoir Salvage Act of 1960 listed above)

Extends the application of the Reservoir Salvage Act of 1960 to recover and preserve "historical and archeological data (including relics and specimens)" that might be lost or destroyed as a result of any Federal construction project or Federally-licensed activity or program.

National Historic Preservation Act of 1966, as amended
(16 USC 470-470t, Sec. 110)

Directs the Secretary of the Interior to promulgate regulations that ensure that significant prehistoric and historic artifacts, and associated records, subject to Section 110 of this Act, the Reservoir Salvage Act (as amended) and the Archeological Resources Protection Act are deposited in an institution with adequate long-term curatorial capabilities.

Archaeological Resources Protection Act of 1979 (16 USC 470aa-mm)

This act and its implementing regulation (43 CFR Part 7) define archeological resources to mean any material remains of human life or activities that are at least 100 years of age, and which are capable of providing scientific or humanistic understandings of past human behavior, cultural adaptation and related topics through the application of scientific or scholarly techniques. The act provides for the protection of archeological resources located on public and Indian lands by (1) requiring that a permit be obtained prior to conducting archeological studies, (2) requiring that information on the nature and location of resources remain confidential if its release may harm the resources, and (3) establishing civil and criminal penalties for the excavation, removal or damage of resources without a permit. Materials lawfully acquired prior to the passage of the act are not subject to the penalties. For resources located on public lands, the act requires that materials excavated and associated records be preserved in a suitable repository. The act also gives the Secretary of the Interior the discretionary authority to issue regulations for the ultimate disposition of resources recovered under the Act as well as resources recovered under the Reservoir Salvage Act (as amended) and the Antiquities Act.

Native American Graves Protection and Repatriation Act of

1990 (25 USC 3001-13)

Establishes a process by which ownership or control of Native American human remains, funerary objects, sacred objects and objects of cultural patrimony that are excavated or discovered on Federal lands or tribal lands after passage of the Act to lineal descendants or culturally affiliated Native American groups; establishes criminal penalties for trafficking in remains or objects obtained in violation of the Act; establishes civil penalties for any museum that fails to comply with the requirements of the Act to be assessed by the Secretary of the Interior under regulations promulgated by the Secretary; provides that Federal agencies and museums that receive Federal funding shall inventory Native American human remains and associated funerary objects in their possession or control and identify their cultural and geographical affiliations within 5 years, and prepare summaries of information about Native American unassociated funerary objects, sacred objects, or objects of cultural patrimony. This is to provide for repatriation of such items when lineal descendants or Native American groups request it.

43 CFR Part 7, "Protection of Archeological Resources"

Establishes uniform definitions, standards, and procedures to be followed by all Federal land managers to protect archeological resources located on public lands and Indian lands of the United States; sets forth a permitting process for the excavation or the removal of archeological resources from public lands and Indian lands; and addresses the ownership and the disposition of resources excavated or removed from public lands and Indian lands.

36 CFR Part 79, "Curation of Federally-Owned and Administered Archeological Collections"

The regulation (1) sets forth the responsibilities of Federal agencies to manage and preserve collections; (2) identifies methods for Federal agencies to use to secure curatorial services; (3) identifies methods for Federal agencies to fund curatorial services; (4) sets forth terms and conditions for Federal agencies to include in contracts, memoranda, agreements and other written instruments with repositories for curatorial services; (5) establishes standards for Federal agencies to use to determine when a repository has

the capability to provide long-term curatorial services;
(6) sets forth guidelines for using collections; and
(7) sets forth procedures and guidelines for conducting
periodic inspections and inventories of collections.

36 CFR Part 1228, "Disposition of Federal Records"

Sets policies and establishes standards, procedures, and
techniques for the disposition of all Federal records in
accordance with 44 USC Chapters 21, 29, 31, and 33.

Preservation, Arrangement, Duplication, Exhibition of Records
(44 USC 2109)

Authorizes the Archivist of the United States to provide for
the preservation, arrangement, repair and rehabilitation,
duplication and reproduction, description, and exhibition of
records or other documentary material transferred to the
National Archives and Record Administration (NARA).

Disposal of Records (44 USC 3301 et seq.)

Defines official records that are made or received by an
agency of the United States Government under Federal law or
in connection with the transaction of public business and
directs that such records be transferred to the National
Archives and Records Administration in accordance with an
established schedule.

41 CFR 101 Federal Property Management Regulations (FPMR)

Prescribes regulations, policies, procedures, and delegations
of authority pertaining to the management of property.

Interior Property Management Regulations (IPMR) (410
Departmental Manual 114-60)

This part prescribes policies, procedures and
responsibilities governing the receipt, accountability,
recordkeeping, management and survey of personal property in
the Department of Interior. The provisions of this Part
apply to all personal property acquired by all bureaus and

offices of the Department of the Interior, and ensure the safeguarding of Government property against waste, fraud, and abuse.

D. ADDITIONAL LAWS, REGULATIONS, AND CONVENTIONS PERTINENT TO MUSEUM PROPERTY

Lacey Act of 1900 (18 USC 43-44)

This act makes the violation of any state, federal or foreign wildlife law a federal offense, and places stipulations on the importing and labelling of wildlife (e.g., birds and mammals) and their parts. It poses complex requirements in relation to wildlife materials acquired, deaccessioned, or sold in museum shops. Enforcement of the Act requires proof of intentional violation, but ignorance of the relevant state, federal or foreign statutes is not excusable. The Black Bass Act of 1930 (16 USC 851) added fish to the list of wildlife under the Lacey Act.

Migratory Bird Treaty Act of 1918 (16 USC 703-711)

Enacted to protect birds flying between the United States and Canada, this Act was later expanded to include Mexico and Japan. It covers all wild, native birds not legally hunted by state law. Some non-native species may be covered by state law and, therefore, the Lacey Act.

This Act makes it illegal to kill, capture, collect, possess, buy, sell, ship, import or export listed species including their parts, nests and eggs. Museums and non-commercial institutions may obtain permits for legal possession, collection and transportation of objects but permits impose extensive record-keeping requirements. Only museums and other specified institutions can purchase any protected bird or part thereof, and the seller must possess a federal permit for a legal sale.

Bald Eagle Protection Act of 1940 (16 USC 668d)

Amended in 1962 to include golden eagles, this act prohibits taking, buying, selling, trading, possession, importation or exportation of eagles or their parts, nests, eggs or products made of them. It does, however, authorize permits for taking, possessing and transporting eagles and their parts for scientific, exhibition and Indian religious purposes. Possession and transportation of eagles held since before the act require no permits, but museums need permits for any materials acquired subsequently.

Marine Mammal Protection Act of 1972 (16 USC 1361-1407)

This act places a moratorium on the killing of marine mammals by United States citizens and restricts the possession, sale, purchase, importation or transportation of the animals and their products and parts. Permits are available for exhibiting marine mammals and their parts and for holding them in storage. However, native peoples can use such parts for the manufacture and sale of handcrafts without permit.

Museums do not need permits for pre-Act materials or to purchase legitimate handcrafts. However, they should consider obtaining permits for all other marine mammal materials.

Endangered Species Act of 1973, as amended (16 USC 1531-1543)

This act makes it illegal to harass, harm or kill listed species and to use, buy or sell the species or parts thereof in the course of an interstate commercial activity. Intra-state transactions are allowed if pre-Act ownership can be proven.

Although the Act does not apply to fossils and objects greater than 100 years old, age should be meticulously verified. Bureaus must have a permit to purchase more recent objects that contain parts of endangered or threatened species.

Donations of endangered or threatened specimens are allowed if there is proof of pre-Act ownership and if the objects

have not been offered for sale since the date of this Act. Loans or donations between educational institutions are allowed. In such instances permits are not required, even if the objects cross state lines.

American Indian Religious Freedom Act of 1978 (42 USC 1996)

This act reaffirms the constitutional right of "freedom to believe, express, and exercise the traditional religions of the American Indian, Eskimo, Aleut, and Native Hawaiians, including but not limited to access to sites, use, and possession of sacred objects, and the freedom to worship through ceremonials and traditional rites."

1970 UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property (implemented in the United States by P.L. 97-446 in 1983, [19 USC 2601])

As one of the signatories to the Convention, the United States agrees to work with other nations to prevent the import of, and trade in, archeological and ethnographic materials (when requested) and in stolen cultural collections. In addition to the United States, Canada and Korea are signatories and Australia is seriously considering signing. The convention, which is enforced by the United States Customs Service, includes language which exempts objects imported for temporary exhibits.

The convention provides protection for archeological and ethnological materials when the home nation requests that other signatories not import these materials. Under this provision archeological materials must be "of cultural significance, at least 250 years old and normally discovered as a result of scientific excavation, clandestine or accidental digging, or exploration on land or under water." Ethnographic materials must be "the product of a tribal or nonindustrial society and important to the cultural heritage of a people because of its distinctive characteristics, comparative rarity, or its contribution to the knowledge of the origins, development or history of that people."

The convention also provides protection for stolen property, including cultural and natural history collections, which have been taken from a museum or public institution (including churches, monuments and archeological sites) in a signatory country. To be covered the materials must have been previously inventoried as part of the institution's collection, however.

The nuances of the implementation of the convention are bound to raise questions. Information on this convention may be obtained from:

United States Information Agency
301 4th Street, S.W., Room 247
Washington, D.C. 20547

1983 Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)

This worldwide effort to protect endangered species of plants and animals by regulating imports and exports was first ratified in 1977 and had been joined by 50 nations by 1980. It allows for certificates of exemption for the import or export of items acquired before CITES, and for non-commercial exchange between institutions.

The convention deals with three appendices that protect materials of varying degrees of scarcity:

Appendix I lists species that are in danger of extinction and there is no commercial trade in them. Any international transport of these materials requires permits from both the exporting and importing nations.

Appendix II lists species that require strict regulation to prevent the danger of extinction and/or look like Appendix I species. Permits for international transport are issued by the exporting nation, and are allowed for any purpose not detrimental to the species.

Appendix III lists species that are protected only within their native countries. They require permits for export even if they are plentiful elsewhere.

Direct questions relevant to CITES, the Endangered Species Act and other laws and regulations to the designated bureau official. The U.S. Fish and Wildlife Service, Office of Management Authority acts as a clearinghouse for information on CITES and other wildlife laws, including procedures and applications for obtaining permits to have endangered or threatened wildlife and plants in a museum property collection for scientific or educational purposes. Address inquiries to:

U.S. Department of the Interior
Fish and Wildlife Service
Office of Management Authority
P.O. Box 3507
Arlington, VA 22203-3507
703/358-2104

Laws (including specific enabling legislation) and regulations that are specific to individual bureaus.

E. MANDATE AND POLICY FOR DEPARTMENTAL INTEGRATED PEST MANAGEMENT PROGRAM

1. Law and Regulations

The Federal Insecticide, Fungicide, and Rodenticide Act (FIFRA) of 1947, as amended, and the Federal Code of Regulations (40 CFR) govern pesticide registration, pesticide usage, the training and certification of pesticide applicators, and the criminal and civil penalties associated with the misuse of pesticides. FIFRA also delegates the enforcement of the provision of the law to the states. Bureaus should become familiar with the applicable state laws governing pesticide usage.

2. Presidential Memorandum

Refer to Figure A.1 for a copy of the memorandum from the President, August 2, 1979, that directs Federal agencies to establish an Integrated Pest Management Program (IPM).

3. Departmental Policy

The Department of the Interior pesticide policy as outlined in 517 DM 1 is as follows:

"To use pesticides only after full consideration of alternatives - based on competent analysis of environmental effects, safety, specificity, effectiveness, and costs. The full range of alternatives including chemical, biological, and physical methods, and no action will be considered. When it is determined that a pesticide must be used in order to meet important management goals, the least hazardous material that will meet such goals will be chosen."

Memorandum for the Secretary of Agriculture, the Secretary of Commerce, the Secretary of Defense the Secretary of and Welfare, the Secretary of Housing and Urban Development, the Secretary of the Interior, the Secretary of Labor, Transportation, the Administrator of the Environmental Protection Agency, the Administrator of the General Services the Chairman of the Council on Environmental Quality

In my Environmental Message of August 2, 1979, I recognized that integrated pest management (IPM) has both environmental benefits and should be encouraged in both research and operational programs of federal agencies. The directing that each of your agencies:

- ! Modify as soon as possible your existing pest management, research, control, education, and assistance programs to adopt IPM strategies wherever practicable within the limits of existing resources.
- ! Review your pest management research, control, education, and assistance programs to assess the potential for incorporation on integrated pest management.
- ! Report actions taken to implement IPM strategies and the results of this review and assessment to the IPM coordinator within six months.

I am establishing an interagency IPM Coordinating Committee to assure implementation of this directive and to develop and implementation of integrated pest management practices. The Committee shall be chaired by the Council on Environmental Quality. Your agency should appoint one representative to serve on this Committee who is an Assistant Administrator, or the equivalent. The Committee is to report to me by June 30, 1980 on progress made by the advancement of IPM and on any institutional barriers thereto. The Committee may request any Executive agency information, advice, and service as may be useful for the fulfillment of the Committee's functions. Each of your agencies cooperate with and furnish support to the Committee as needed to carry out its functions.

Please give these assignments your immediate attention.

JIMMY CARTER

August 2, 1979

Figure A.1. Presidential Memorandum Establishing IPM Program