

October 5, 2014

## **National Museum of the Morgan Horse Collection Policy**

### **Introduction**

This policy governs the activities of the national Museum of the Morgan Horse with regard to the management of the museum's collections of Morgan horse historical materials. Decisions concerning the activities outlined below must conform to this policy and the museum's purpose.

### **Applicability**

This policy has been drafted by museum staff for the approval of the National Museum of the Morgan Horse Council and the American Morgan Horse Association. The American Morgan Horse Association Board of Directors is the body vested with the ultimate responsibility for the management of the National Museum of the Morgan Horse.

### **Background**

The National Museum of the Morgan Horse supports the American Morgan Horse Association and AMHECT's charitable educational and historical goals. An American Morgan Horse Institute Resolution created a Morgan horse museum, which commenced operation April 1, 1992. and outlined the management hierarchy between the American Morgan Horse Institute, the National Museum of the Morgan Horse Council and the National Museum of the Morgan Horse. The National Museum of the Morgan Horse now operates under the direction of The American Morgan Horse Association as of August 1, 2014.

### **Statement of Purpose**

1. The stated objective of the American Morgan Horse Institute in establishing the National Museum of the Morgan Horse is:

***'to educate the public about the Morgan horse; to further that purpose by collecting, making available for study and/or display historical materials, and encouraging original research relating to the Morgan breed.'***

2. Implementation demands a policy that:

a] Develops attractive displays and exhibits that demonstrate the story of the Morgan Horse, educate the public and utilize the best available modern media techniques.

b] Organizes collections that will illustrate and preserve Morgan breed history.

i. Provides for accession of materials

ii. Provides for timely reassessment of collections and for de-accession

of materials when necessary.

iii. Permits the loan of items to the museum or the loan of items from the museum under specified conditions.

iv. Recognizes the limitations in museum space, finances and personnel.

## **Collecting Plan**

Execution of the museum's mission and policy will be governed by:

### **1. DEFINING COLLECTIONS**

a] In times of financial abundance and stability museum staff will actively pursue the attainment of objects that will strengthen the museum's collection.

b] All objects collected must have direct bearing on Morgan horse history.

\*\*\* In order to clarify point b]

Museum staff will always hold the power of discretion as to whether or not prospective objects are appropriate for the museum's collection. Staff is encouraged to refer to museum's statement of purpose for guidance. Some specific suggestions that can be followed are:

- - No duplicate materials.
- - No Prize Lists.
- - No non breed specific equine magazines.
- - No materials that have no documentation. (i.e. articles with no author, photographs with no connected description of who or what is pictured)
- - No tack, trophies, or show clothing that is in poor condition.
- - No donations will be accepted without proper 'Deed of Gift' documentation.
- - All donations must be approved by staff before entering the collection.

## **Collections Management Activities**

### **1. DOCUMENTATION**

a] The archivist will assign an accession number to all items entering the museum collection.

b] Files will be kept that document the following:

i. Chronological accession numbers with description of the object, history of how it entered the museum collection and location in the museum archives.

- ii. All agreements regarding loans to or from the museum shall be filed alphabetically by last name of the lender or borrower.
- iii. PastPerfect is the software currently used by the museum as a computerized catalogue of the collection. As time permits, staff will add objects that are currently part of the collection that were never digitized. Staff will enter all future acquisitions into the system.
- iv. On the occasion of loss or damage to any objects in the collection, staff will make documentation and inform the museum council.

## 2. ACQUISITIONS

- a] Staff may acquire objects for the collection by any acceptable method. Acceptable methods include gifts, bequests, purchases, exchanges, field work acquisitions or transfers from another department or office within the American Morgan Horse Association and American Morgan Horse Institute. Purchases require approval from the museum council.
- b] Gifts to the museum will carry no restrictions, with only the following exception:
  - i. The case in which a gift to the museum consists of published literary materials and does not include a copyright to those materials. [i.e. books]
- c] Accessioning:
  - i. The archivist will accession all acquisitions into the museum's permanent collection and maintain appropriate records. The records will at least include a description of the object, measurements, brief condition report, date of receipt, source and method of acquisition. Gifts to the museum must be accompanied by a 'deed of gift' in order to be officially accepted into the collection.
  - ii. Appraisals are not necessary in order for the museum to accept an object as a gift. Prospective donors are responsible for securing their own appraisals of objects offered to the museum. The museum does not provide appraisals for income tax or estate purposes, however staff may provide donors with information regarding independent appraisers on request.
  - iii. Bequeaths and donations will be reviewed by staff and accepted only if the objects meet the acquisition criteria stated above.

\*\*\*note, the museum currently houses numerous objects that have never been accessioned. As time permits, the archivist will accession these objects into the collection and gather as much information on these 'ghost' objects as possible.

### 3. DE-ACCESSIONS

a] The archivist will make de-accessions when necessary and will follow this standard procedure:

- i. De-accessions will be brought to the council's attention and must be approved before completion.
- ii. Each object de-accessioned will be recorded in a 'de-accession' file. This file will include the date of de-accession, the reason for de-accession and the disposal method. (i.e sale, transfer, donation)

b] Reasons for de-accessioning objects from the collection may include:

- i. Duplicate materials
- ii. Deterioration beyond usefulness
- iii. Not relevant to purposes of the museum
- iv. Conservation needs that cannot be met by the museum

c] Disposition of de-accessioned material shall be as follows:

- i. Educational or fraternally associated horse interests will be given preference as receptacles of de-accessioned objects.
- ii. Items may be sold at the discretion of the museum council by private sale or public auction, with proceeds allotted to the museum's Acquisition fund.
- iii. Deteriorated items or duplicate materials may be disposed of/destroyed at the discretion of the archivist. (before disposal, donors will be notified of the intent to de-accession and will be given the right to repossess the gift)
- iv. The museum may not sell, give or transfer any de-accessioned object to any of its staff, volunteers, council members, Institute members, except at an open public sale.

\*\*\* Note. Objects that are now housed in the office or archive of the museum that have never been officially accessioned into the collection may be disposed of at the archivist's discretion. Archivist will file a list of these de-accessions in the de-accession file.

### 4. LENDING AND BORROWING

#### 1. Temporary Custody

a] The museum may take objects into temporary custody for the purpose of assisting in the identification of an object already in the

collection or for the purposes of temporary special exhibits.

b] In all cases in which the museum accepts temporary custody of an object, the museum will deliver to the object's owner or custodian a receipt identifying the object and stating the date of receipt in the museum, the purpose of custody and the expected duration of custody.

c] Museum staff will complete an incoming and outgoing condition report for each object on temporary loan to the museum.

## 2. Incoming and Outgoing Loans

a] The archivist may arrange the outgoing loan of any museum object to other appropriate institutions for the purposes of exhibition, education or research.

b] The archivist may borrow objects from other institutions or private individuals for the museum's use in conjunction with the purposes stated above.

c] All incoming and outgoing loans will be documented by loan agreements developed by the archivist and approved by the museum council. All loan agreement documents will record, at a minimum, the identification of the loaned object, the duration of the loan, the object's insurance value, a condition report and shipping arrangements.

d] Requests to borrow objects from the collection are reviewed according to the following criteria:

a] Context and rationale for the request.

b] Condition of the works requested and suitability for travel.

c] Arrangements for safety and security.

d] Exhibition and research needs of the museum.

e] Incoming loans will be reviewed according to the following criteria:

a] Availability of storage or exhibition space.

b] Issues of transportation and insurance.

c] Condition of the object and museum's ability to provide proper care.

## **LIBRARY AND ARCHIVE FOR RESEARCH PURPOSES**

The museum acquires, organizes, catalogs and provides access to primary resources and rare materials of historical significance related to the Morgan horse. Collections range from single copies of the official records of the American Morgan Horse Association and American Morgan Horse Institute to photographic, video and audio materials; books and specialized rare books, manuscripts, farm and personal records, maps, broadsides, newspapers,

pamphlets, leather tack and other printed materials. In addition, the Barbara Cole Memorial Library houses general equine related literature.

1. All permanent collections and related records shall be made available for legitimate study, research, inquiry and examination.
2. Rare volumes and materials are to be kept in locked glass cabinets, or in the archive room.
3. Access to library material is by request and may be limited by staff availability, fragility of collections and the nature of the examination requirements.
4. Outgoing loans of library materials will be treated in the same manner as outgoing loans of archive materials.

### **CARE OF COLLECTION**

1. The museum is responsible for the preservation and safety of all objects in its possession. The Archives currently resides in Special Collections in the Davis Library at Middlebury College. This includes the maintenance of acceptable environmental conditions in the galleries and Archives. Objects will be handled only by museum staff, or under the supervision of museum staff.
2. The museum staff will perform basic cleaning of objects from the collection. Objects' preservation needs will be met according to current industry standards as time, money and staffing permits.
3. Museum doors will be locked except during regular operating hours. The main entry to the building is secured with an alarm system wired to the security company that will notify appropriate parties at the event of unauthorized entrance. The Archive room door at Middlebury College will always be locked; access to the archive room is restricted to authorized museum staff. Visitors may enter archive room at museum staff's discretion, and will be accompanied by museum staff or staff at Special Collections.
4. The exhibit area will be staffed as time and funding permits.

### **RISK MANAGEMENT**

The museum's premises, holdings and activities are insured by arrangement with the American Morgan Horse Association. Emergency procedures in case of fire, flood or medical emergency have not yet been established in the Gallery, and standard procedures are in place in the Archives at Special Collections. It is understood that protection of human life comes first and that the building must be evacuated when a fire alarm occurs or a life

threatening event occurs.