



# United States Department of the Interior

OFFICE OF THE SECRETARY  
Washington, DC 20240

**MAY 2 - 2012**

## Memorandum

To: Heads of Bureaus and Offices  
Museum Property Executive Program Committee

From: Debra E. Sonderman, Director *Debra E. Sonderman*  
Office of Acquisition and Property Management

Subject: Bureau Museum Property Management Data Call for Fiscal Year 2012  
**(Response Due: December 15, 2012)**

This memorandum requests bureau and office (bureau) museum program data for FY 2012 to fulfill bureau reporting requirements prescribed in Part 411 of the Departmental Manual (411 DM). Data are requested to execute program oversight responsibilities assigned to the Office of Acquisition and Property Management (PAM) and to track bureau progress in improving accountability and use of museum property. New data requirements were instituted in FY 2010 and FY 2011 in response to recommendations in the Office of Inspector General report, "Museum Collections: Accountability and Preservation," issued on December 16, 2009. The information submitted based on this data call will be used to write the FY12 DOI Museum Property Management Summary Report. This report will be sent to the Deputy Assistant Secretary – Budget, Finance, Performance and Acquisition, the Museum Property Executive Program Committee, and the Interior Museum Property Committee.

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All data requested in this memorandum are due to the Director, Office of Acquisition and Property Management by December 15, 2012, with data valid as of September 30, 2012. Advance electronic copies of unofficial reports may be submitted to Terry Childs at [terry\\_childs@ios.doi.gov](mailto:terry_childs@ios.doi.gov) to allow for preliminary aggregation of data.

Bureau Museum Property Management Summary Reports are prescribed in 411 DM and must follow the outline below (see <http://elips.doi.gov/ELIPS/DocView.aspx?id=1373> for the full context of this reporting requirement).

1. **Summary of Accomplishments.** Summarize major highlights in implementing your bureau plan for managing museum property.
2. **Resources.** Summarize the resources (funds and FTE) expended to manage your bureau's museum property during the reporting period and explain any significant increases or decreases. Report these numerical data on the designated lines on Chart A.
3. **Issues.** List and describe issues that impact your ability to implement your bureau plan for managing museum collections. Describe actions you are taking to address these issues.
4. **Revisions to Bureau Plan.** Summarize any revisions to your bureau plan for managing museum property.
5. **Goals.** Identify the goals of your bureau plan for managing museum property.
6. **History.** Provide a brief history of the bureau's museum collection.
7. **Oversight.** Describe the structure of museum property oversight within your bureau,

including a short explanation of how your bureau identifies its units (see Chart A). Identify individuals currently representing your bureau on the Department's museum property committees.

8. **Collection Size and Management.** Use the appropriate attached charts to summarize the size of your bureau's collection and related management activities. Discuss any significant additions and/or withdrawals evident in Charts B and C. Discuss the number of facilities in "Fair" or "Poor" condition that were evaluated over five years ago and plans to reevaluate those facilities. See below for a description of the information required in each chart.
9. **Museum Property Accountability Contacts.** Accountability for all Government property, including museum property, is delegated to "accountable officers" and "custodial officers." Provide the name, address, telephone number, and e-mail address for each accountable and custodial officer responsible for the museum property housed at all bureau and non-bureau facilities listed.

Review of past-year annual reports continues to reveal opportunities for more complete compliance with reporting mandates. Please ensure that your report includes all information requested and your data are reported using the templates provided in the attached charts. See Attachment I for instructions on completing the Charts in Attachment II. **Data among all charts must be consistent.**

Questions and comments concerning this data call should be directed to Dr. Terry Childs, DOI Museum Program Manager, at 202-254-5546 or by e-mail at [terry\\_childs@ios.doi.gov](mailto:terry_childs@ios.doi.gov).

Attachments

cc: Interior Museum Property Committee

## Attachment I – Instructions for Completing Charts

### General Collections Data (Chart A)

Use Chart A to report the following:

- Total funds expended and FTE involved in managing bureau museum property, including staffing, projects, equipment, and supplies.
- Number of bureau units managing bureau museum property. A unit is a bureau organizational entity (e.g., accountability area, administrative unit, center, laboratory, museum, office, park, school, site, refuge, or repository) that manages museum property. A unit's museum property may be stored in multiple bureau or non-bureau facilities. A unit is responsible for preparing a Scope of Collection Statement (SOCS) for the museum property it manages, therefore the number provided should be consistent with Chart E. Provide a short explanation of how your bureau identifies its units under "Oversight" in your narrative report.
- The number of objects held in bureau and non-bureau facilities broken down by discipline. Only report number of cubic feet for objects and/or linear feet for archives when the actual item count is unknown. "Documents" as used in previous data call memoranda is renamed "Archives." For some bureaus, objects previously classified as Class 1 "Documents" may now be reported as "History."

### Cataloging and Condition Status (Chart B)

Complete only the row applicable to your bureau/office. Use Chart B to report the following:

- Total additions and withdrawals by number of museum items (objects and archives.) Only report cubic feet and/or linear feet when the actual item count is unknown.
- Estimated total collection size in FY 2012.
- Total number of items cataloged at all facilities.
- Total number of items cataloged with condition data.
- Percent of cataloged items in good, fair, and poor condition. We recognize that precise definitions will vary due to the high number of catalogers working with multiple systems over several decades. To the extent possible, correlate available records to "good," meaning in stable, usable condition; "fair," meaning in need of minor repair or cleaning to bring to usable condition; or "poor," meaning in need of major conservation treatment to stabilize. If catalog notations of condition are not accessible, or do not reasonably correlate with the above definitions, do not count them among the items for which condition is recorded. Provide a short explanation in your narrative report of what conditions are known but are not reported, if applicable.

### Additions and Withdrawals (Chart C)

Complete the 2011 Totals, 2012 Additions, and 2012 Withdrawals rows for your bureau by discipline. Only report number of cubic feet and/or linear feet when the actual item count is unknown. For each discipline, FY 2011 data plus reported additions and minus reported withdrawals will equal totals for FY 2012. Provide an explanation of the nature of the FY 2012 additions and/or withdrawals in your narrative report under "Collection Size and Management," particularly if they are significant.

### Condition of Facilities Housing Museum Collections (Chart D)

The general condition of museum collections is based on the condition of the facility housing the museum collections. Use Chart D to report the following:

- Total number of bureau and non-bureau facilities housing bureau museum collections.
- Total number of bureau and non-bureau facilities housing bureau museum collections evaluated.
- Total number of bureau and non-bureau facilities that have been assessed for condition using the DOI Facility Checklist, and the number of facilities that are in good, fair, or poor condition. Facilities that meet 70% or more of the Checklist standards are “good,” those that meet between 50% and 69% of standards are “fair,” and facilities that meet less than 50% of the standards are “poor.” Priority should be given to obtaining Checklist scores for facilities that have not recently been evaluated and use of scores that are older than five years should be avoided. Bureaus and offices are encouraged to share facility condition scores completed within the last five years if they have collections housed in the same facility. Until all facilities have been assessed using the DOI Facility Checklist, an acceptable alternative is accreditation by the American Association of Museums that shall be reported as being in “good” condition.
- Total number of bureau and non-bureau facilities that were assessed for condition more than five years ago. Discuss the number of facilities in “Fair” or “Poor” condition that were evaluated over five years ago and plans to reevaluate those facilities in your narrative report under “Collection Size and Management.”
- Total number of bureau and non-bureau facilities that have not been evaluated for condition.
- Deferred maintenance is maintenance that was not performed when it should have been or was scheduled to be performed and subsequently put off or delayed to a future time. Report deferred maintenance related to museum facilities and museum collections. Include only those deferred maintenance costs for which data are substantiated by unit-level museum property management documents in 411 DM.
  - Deferred maintenance for museum facilities is only applicable to bureau facilities and must be distinguishable from deferred maintenance of personal property. You should work with an appropriate bureau facility manager to determine these costs.
  - Deferred maintenance for museum collections may include conservation surveys, conservation treatments, re-packaging collections for long-term storage, and cyclic maintenance. Ensure that this information is consistent with the bureau’s overall deferred maintenance information. Note that you may have collections-related deferred maintenance costs even if the collections are housed in facilities for which the bureau does not have facilities maintenance responsibilities. Responsibilities for collections-related deferred maintenance costs may be identified in written agreements between the bureau and the non-bureau facility.

**Scope of Collection Statements (SOCS) by Bureau Unit (Chart E):**

List each unit that is required to have a SOCS. Identify if a SOCS exists for each bureau unit listed. If so, include the date it was last signed. Each SOCS must be reviewed, updated if necessary, and signed by the bureau designated official at least every five years. All units counted in Chart A must be listed here. For example, if five units counted in Chart A all share the same SOCS, the units and the SOCS should all be identified in Chart E.

**Annual Inventory Completion (Chart F):**

Report the status of annual inventory completion (Completed or Not Completed) at all bureau and non-bureau facilities housing museum property and the date the certificate of inventory was signed by the Accountable Officer in FY 2012. If inventories are organized in a manner other than by bureau and non-bureau facility, explain that organization in your report narrative under “Collections Size and Management.”

**Non-Bureau Facilities (Chart G):**

List the name of each non-bureau facility, including non-Federal facilities, housing bureau collections and the city and state in which it is located. Do not include non-bureau facilities that only have items on short-term loan for temporary exhibits, research, or conservation. Furthermore, identify the type of agreement (e.g., cooperative agreement, contract, assistance agreement) between the bureau and each non-bureau facility. State the total amount of funding, if any, for curation services and for equipment, supplies, or personnel (e.g., intern, temporary staff) purchased for or provided to each facility in FY 2012.

**Current Partnerships (Chart H):**

List all institutions involved in a current partnership related to the management of museum collections and a short description of the partnership activity. Partnerships with foundations, special interest groups or organizations, university academic departments, or other institutions may include volunteer or other programs for cataloging objects, designing exhibits, or performing special projects related to the care, documentation, or exhibit of museum collections. Do not repeat the list of non-Federal partner facilities providing curation services on Chart G, unless the partnership has been expanded in a significant way. In those cases, briefly describe the partnership activity on Chart H.