

VIRGINIA MUSEUM OF NATURAL HISTORY
Board of Trustees Research and Collections Committee

Saturday, Nov. 12, 2022

9:00-9:45 a.m.

A G E N D A

- Call to order
- Roll Call: Dr. Art Evans, Dr. Tom Benzing, Dr. Carole Nash, Melany Stowe, Mark Buss.
- May 2022 Research and Collections Committee meeting minutes (action item)
- April-September 2022 acquisitions (action item)
- Review of museum collections policies
- Other business
- Adjourn

The mission of the Virginia Museum of Natural History:

To interpret Virginia's natural heritage within a global context in ways that are relevant to all citizens of the Commonwealth.

VIRGINIA MUSEUM OF NATURAL HISTORY BOARD OF TRUSTEES
MINUTES OF THE RESEARCH AND COLLECTIONS COMMITTEE MEETING
May 20, 2022

Present at the meeting were Dr. Art Evans, Dr. Tom Benzing, Mark Buss, Lisa Carter, Melany Stowe, Dr. Carole Nash, Dr. Hayden Bassett, and Mary Zell Galen.

Committee Chairman Dr. Art Evans called the meeting to order. The minutes were unanimously approved. The full committee signed off on the museum's recent acquisitions.

Dr. Art Evans asked Dr. Hayden Bassett if he could discuss recent activities in his department. Dr. Bassett said that due to the ongoing war in Ukraine, much of his department's focus has revolved around the Cultural Heritage Monitoring Lab (CHML). Dr. Bassett said that the CHML has grown significantly in the last several months and it is now working directly with several stakeholders and partners to monitor damage to Ukraine in real-time. These stakeholders include the Department of State, which the CHML will be working with to document human rights violations abroad. Another stakeholder is the Ukrainian Ministry of Culture, and over the past few weeks, Dr. Bassett said the CHML has been meeting virtually with Ukraine's Minister of Culture as well as his staff. Dr. Bassett said that even if the war in Ukraine were to end next month, the work his team is doing with the CHML in Ukraine will continue for years to come.

Melany Stowe asked Dr. Bassett if anyone else was doing the sort of work that the CHML is doing. Dr. Bassett said other entities were doing parallel activities, but the types of work CHML is doing by working directly with Ukraine and other government agencies is unique.

Lisa Carter asked if it was possible that Russia was monitoring the work that the CHML is doing in Ukraine. Dr. Bassett said he has no evidence that they are but feels as though it's extremely likely. Dr. Bassett added that the CHML strives to be completely objective, simply reporting on impacts rather than attributing those impacts to anyone. Dr. Bassett added that the CHML has attracted the attention of such news agencies as New York Times, Washington Post, Washington Journal, PBS Newshour, BBC, The Guardian, The Telegraph, and others.

Dr. Carole Nash said she appreciated the fact that the CHML's efforts are expanding the concept of what a museum is and what it does. Dr. Bassett said that in the future, it may be possible to use the groundwork of the CHML to establish a biological equivalent that would monitor habitat loss.

The committee supported the nominations of Dr. Derek Hennen and Dr. Julian J. Lewis as Research Associates. The committee also supported the renewals of the following

Research Associates: Dr. Robert Bodnar, Dr. Art Evans, Dr. Carole Nash, Dr. Tom Benzing, William Henika, Dr. Cynthia Liutkus-Pierce, Dr. Sterling Nesbitt, Dr. John Pagels, Dr. DB Poli, and Dr. William Schmachtenberg.

Dr. Tom Benzing mentioned that a herpetologist named Michael Hayslett had expressed interest in becoming a Research Associate. Dr. Art Evans suggested that Hayslett reach out to Dr. Arianna Kuhn once she starts her new position as VMNH Assistant Curator of Herpetology in the fall.

Dr. Hayden Bassett said that he's excited about the VMNHcast, the new podcast hosted by Administrator of Science Ben Williams, and encouraged the board to listen to it.

Dr. Carole Nash said that several archaeologists, some of them quite significant, have asked to donate their collections to VMNH. This is not always possible due to space limitations. Dr. Nash said that until more collections space is available at the museum, she has offered to take these donations to Mountain Valley Archaeology. Dr. Hayden Bassett said that he's on board with the plan, although he would like direction from the board as to how many of these requests the museum should take on, adding that we're probably 3-5 years from the Douglas Avenue collections storage being ready. Bassett also added that the collection of Guatemalan artifacts the museum possesses will soon be returned to Guatemala.

Dr. Art Evans adjourned the meeting.

APRIL-SEPTEMBER 2022 VMNH ACQUISITIONS FOR APPROVAL BY BOARD OF TRUSTEES RESEARCH AND COLLECTIONS COMMITTEE

RIM* No.	Collector/Donor	Date at VMNH	VMNH Dept.	Quantity	Description	Method	To Be Accessioned (Y/N)
RIM 11-2022	Dr. Kal Ivanov	3/31/2022	MAMMALOGY	1	hairy-tailed Mole (<i>Parascalops breweri</i>)	SALVAGE	Y
RIM 12-2022	Dr. Julian J. Lewis	3/4/2022	RECENT INVERTEBRATES	58 vials	95% EtOH preserved invertebrates, Isopoda	Gift	Y
RIM 13-2022	Curt W. Harden	6/13/2022	RECENT INVERTEBRATES	172	39 vials w/unknown # of unidentified invertebrates and 133 dry, pinned specimens	Gift	Y
RIM 14-2022	Derek Hennen	7/12/2022	RECENT INVERTEBRATES	39	39 vials alcohol preserved specimens, 36 w/arthropods, 3 <i>Nannaria</i>	Gift	Y
RIM 15-2022	Liberty Hightower	7/11/2022	MAMMALOGY	1	Fox Squirrel (<i>Sciurus niger</i>), female	SALVAGE	Y
RIM 16-2022	Laura Steele (Infinity Acres Ranch)	7/14/2022	MAMMALOGY	1	Kangaroo (<i>Macropus</i> sp.), juvenile male	Gift	Y
RIM 17-2022	Nancy D. Moncrief	9/10/2022	MAMMALOGY	2	Eastern Mole (<i>Scalopus aquaticus</i>) and Virginia Opossum (<i>Didelphis virginiana</i>)	SALVAGE	Y

* RIM is an acronym for the Record of Incoming Material form

VMNH Collections Committee and Executive Director have Approved Recent Acquisitions: RIM 11-2022 through RIM 17-2022

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APRIL-SEPTEMBER 2022 VMNH ACQUISITIONS FOR APPROVAL BY BOARD OF TRUSTEES RESEARCH AND COLLECTIONS COMMITTEE

VMNH Board of Trustees Research & Collections Committee Review of Acquisitions: RIM 11-2022 through RIM 17-2022

Arthur V. Evans, Chair

(signature) Arthur V. Evans, Chair

Date

Thomas R. Benzing

(signature) Thomas R. Benzing

Date

Mark J. Buss

(signature) Mark J. Buss

Date

Lisa Carter

(signature) Lisa Carter

Date

Carole L. Nash

(signature) Carole L. Nash

Date

Melany Stowe

(signature) Melany Stowe

Date

**VIRGINIA MUSEUM OF NATURAL HISTORY
RESEARCH AND COLLECTIONS ACTIVITIES**

**Report to the Board of Trustees
April-June 2022**

**Kaloyan Ivanov, Ph.D.
Associate Curator of Invertebrate Zoology**

- Drs. Ivanov and Means and colleagues from Brazil have a manuscript accepted at *Zoologia*.
- Drs. Ivanov and Keiper have a manuscript in review at *Journal of Forensic Sciences*.
- Dr. Ivanov provided training in insect collecting, identification, and natural history to members of the Blue Ridge Foothills and Lakes Chapter of the Virginia Master Naturalist.
- Drs. Ivanov and Means, L. Hightower, and R. George presented a workshop on arthropod diversity and collecting techniques to students from ONE Forest School.
- Dr. Ivanov participated in VMNH's first-ever Wildlife Festival and interacted with 750+ visitors.
- Drs. Ivanov and Means are serving as co-editors for a manuscript submitted to *VMNH Memoirs*.

Research & Collections

Drs. Ivanov and Means (VMNH), R. Bouzan, Drs. A. D. Brescovit and L. F. M. Iniesta (Instituto Butantan, Brazil) and T. M. Almeida (Instituto Nacional de Pesquisas da Amazônia, Brazil) have a paper accepted at *Zoologia*. The paper focuses on the Amazonian millipede genus *Leptherpum* (Polydesmida: Chelodesmidae) and includes the description of three new species.

Drs. Ivanov and Keiper have a Case Report in review at the *Journal of Forensic Sciences*. The manuscript focuses on recently completed forensic case regarding the death of a captive exotic animal and a litigation under the Endangered Species Act.

VMNH Research Associate and Clemson University graduate student C. Harden, VMNH Biology Technician L Hightower, and Dr. Ivanov are drafting a manuscript (to be submitted to *Subterranean Biology*) on the efficiency of two subterranean trap designs for targeting endogaeic invertebrate taxa in the Appalachian Highlands of the eastern US.

Dr. Ivanov and Virginia Tech colleagues (former graduate student M. Malone, Drs. Schurch and Taylor) are completing work on a manuscript focusing on the range expansion of the invasive Red Imported Fire Ant, *Solenopsis invicta* Buren, in Virginia. The manuscript (to be submitted to *Biological Invasions*) also explores the potential spread of this notorious invasive species across the United States using predictive distribution modelling.

Drs. Ivanov and Means (VMNH), R. Bouzan, Drs. A. D. Brescovit and L. F. M. Iniesta (Instituto Butantan, Brazil) are completing a manuscript on the worldwide distribution of the cavernicolous millipedes of the family Chelodesmidae (Diplopoda: Polydesmida). The manuscript (to be submitted to *International Journal of Speleology*), is the first account of the cave-dwelling members of the family and includes a list of all Chelodesmidae taxa reported from caves, maps their worldwide distribution, and offers a discussion of the troglomorphic features of the group.

Drs. Means and Ivanov (VMNH), R. Bouzan, Drs. L. F. M. Iniesta and A. D. Brescovit (Instituto Butantan, Brazil), D. Martinez-Torres (Universidad Nacional de Colombia, Bogota, Colombia), and L. F. Vasquez-Valverde (Virginia Tech, Blacksburg, Virginia) are working on a manuscript (to be submitted to *European Journal of Taxonomy*) focusing on the Andean-endemic millipede genus *Dibolostethus* (Polydesmida: Chelodesmidae). The manuscript includes the description of two new species (one of which from VMNH's invertebrate collections), and a summary of the tribes (with a key) and genera known from the Andean region of South America.

Drs. Means and Ivanov continued work on their ongoing "*Nannaria incertae sedis*" project which (as of now) has resulted in the discovery of 13 as of yet undescribed species in the *minor* clade of the xystodesmid genus *Nannaria* in the eastern US. Recent work included DNA extraction and quantification of all 13 taxa. The samples will be sent for genome sequencing by Dr. P. Marek and subsequently analyzed at Virginia Tech.

This quarter, Dr. Ivanov and colleagues (primarily Dr. Means) conducted fieldwork at Caldwell Co., NC, Pike Co., KY, and 10 Virginia counties (Alleghany, Dickenson, Craig, Grayson, Henry, Patrick, Roanoke, Russell, Smyth, and Washington) in support of ongoing research projects.

Drs. Ivanov and Means, and L. Hightower initiated a project focused on the leaf-litter and soil arthropod fauna of a private property located at the foothills of the Blue Ridge Mountains in Stuart, VA. The work, which is partly funded by the property's owner and longtime museum supporter L. Reagan, was largely motivated by the discovery of an unusual species of terrestrial isopod (possibly undescribed) and an apparently dense population of the state-listed threatened millipede *Apheloria whiteaheadi* (Shelley). The study, which employs a variety of arthropod collecting techniques including pitfall traps, subterranean traps, litter sifting, Malaise traps, and hand collecting, will allow for a rigorous comparison of the local arthropod above ground and below ground diversity as well as for testing hypotheses regarding the efficiency of these techniques for targeting specific components of the local ecosystem. The first two rounds of sampling were completed in early April and June.

VMNH Collections Manager H. Cartmell and Registrar J. Harris, with help from L. Hightower and Dr. Ivanov, completed work on reorganizing VMNH's "Wet" Biology storage. All taxa are now arranged systematically reflecting current knowledge.

H. Cartmell, with help from Dr. Ivanov, is working on inventorying and cataloging VMNH's Mollusca (mollusks) holdings.

Dr. Ivanov oversaw the acquisition of Dr. B. Steinly dipteran (primarily Ephydriidae) collection from Miami U, Ohio. The collection is currently temporarily stored at VMNH's disinfestation chamber awaiting processing.

Visiting researcher Dr. J. J. Lewis used VMNH's invertebrate holdings to study aquatic isopods (Isopoda: Asellidae) from the eastern US. (April 23)

Dr. Ivanov satisfied loan requests regarding VMNH's invertebrate holdings: Cynipidae (gall wasps) (Dr. A. Deans; Penn State University); *Lirceus* spp. (aquatic isopods) (Dr. J.J. Lewis; Lewis & Associates); Platyrrhacidae, including type material (millipedes) (Dr. E. Florez; Universidad Nacional de Colombia).

Dr. Ivanov oversaw the acquisition of 24 lots of ethanol-preserved identified aquatic isopods (Isopoda: Asellidae), including types of 3 newly described taxa, 32 lots of identified terrestrial isopods (Isopoda: Oniscidea), and 2 lots of identified amphipods (Amphipoda: Crangonyctidae) donated to VMNH by Dr. J.J. Lewis (Lewis & Associates; RIM2022-012); 39 lots of ethanol-preserved unidentified invertebrates, and 109 pinned/pointed identified beetles, and 24 pinned/pointed unidentified insects donated to VMNH by C. Harden (Clemson U; RIM2022-13); 36 lots of ethanol-preserved bulk invertebrates from litter samples, and 3 *Nannaria* spp. (Polydesmida: Xystodesmidae) donated to VMNH by Dr. D. Hennen (VDACS; RIM2022-14).

Education & Outreach

Drs. Ivanov and Means, and L. Hightower presented displays during the 2022 Martinsville and Henry County Historic Garden Week. The Virginia Museum of Natural History was one of the host sites during the event and offered local garden clubs floral displays and pollinator displays featuring numerous specimens from the museum's invertebrate collections, which are not usually available for public viewing. The materials were widely appreciated by the public and encouraged participants to discuss features of their anatomy, morphology, and biology with the VMNH team. (April 27)

Dr. Ivanov provided training in insect collecting, identification, and natural history to members of the Blue Ridge Foothills and Lakes Chapter of the Virginia Master Naturalists, and along with VMNH Curator of Mammals Dr. Nancy Moncrief and Assistant Curator of Paleontology Dr. Adam Pritchard provided a guided tour of the museum's collections. The Virginia Museum of Natural History is one of the seven sponsoring agencies of the Virginia Master Naturalist Program, which is designed to develop a group of well-trained volunteers to provide education, outreach, and services dedicated to the management of natural resources and natural areas for the Commonwealth of Virginia. (May 14)

Dr. Ivanov and museum staff participated in VMNH's first-ever Wildlife Festival, which offered a variety of one-day-only displays and activities that ranged from invertebrate and vertebrate materials from the museum's collections to live snakes and birds of prey, special presentations by wildlife experts, and wildlife-themed children activities and crafts. The event, which brought a generally new audience to the museum, attracted over 750 children and adults from Virginia, North Carolina, and 7 additional states (Alabama, Maryland, Michigan, South Carolina, Tennessee, Vermont, and West Virginia). (June 18)

Drs. Ivanov and Means, L. Hightower, and Collections intern R. George traveled to Smith Mountain Lake and presented a workshop on arthropod diversity and collecting techniques to students from ONE Forest School. (June 29)

Collections intern Rosie George (College of William & Mary) began work in the Department of Recent Invertebrates in early June. Rosie will assist in the curation, maintenance, and management of the museum's invertebrate collection. Duties will include fieldwork; processing of samples; specimen preparation, labeling, rehousing, and cataloging; capturing data from specimens in the collections; and assisting with outreach.

Dr. Ivanov responded to arthropod identification and information requests to individuals from Bassett, Danville, Fredericksburg, and Richmond, VA.

Media

"VMNHcast #4: The Tiger King and forensic entomology". VMNHcast hosted by Ben Williams, Virginia Museum of Natural History, Martinsville, Virginia. (May 18) (with Dr. J. Keiper)

Professional Service

Dr. Ivanov joined Virginia Tech's graduate student G. Harrison Advisory Committee and participated in Garrett's first (virtual) committee meeting (April 6) and virtual thesis proposal (May 13). Garrett's work will focus on the subterranean arthropod diversity in southwestern Virginia utilizing subterranean traps and voucher-based DNA barcoding.

As part of Virginia Tech's graduate student D. Wilczek Advisory Committee, Dr. Ivanov traveled to Blacksburg and participated in Daniel's successful thesis defense held in the Department of Entomology on May 3.

Dr. Ivanov copy edited an article for the Virginia Natural History Society's periodical *Banisteria* (Volume 56, 2022) (completed June 30).

Dr. Ivanov served as a peer reviewer for manuscripts submitted to *Banisteria* and *VMNH Memoirs* (completed May 19 and 20).

Drs. Ivanov and Means are serving as co-editors of VMNH's *Memoirs* series for a recently submitted manuscript titled "The groundwater isopods of Virginia (Isopoda: Asellidae and Cirolanidae)" by Dr. J. J. Lewis and colleagues. The manuscript is currently in review.

Nancy D. Moncrief, Ph.D.
Curator of Mammalogy

- Dr. Moncrief and her collaborators submitted a manuscript about Lyme disease emergence in Virginia to the peer-reviewed journal *Ticks and Tick-borne Diseases*.
- Dr. Moncrief and her collaborators presented a poster about their Lyme disease study at the annual conference of the American Society of Mammalogists
- Dr. Moncrief was interviewed about her work on armadillos for an article that was published online by National Geographic.

Research and Collections

In April, Dr. Moncrief and her collaborators Dr. R. Jory Brinkerhoff and Ms. Meghan Leber (University of Richmond) and Ms. Lisa Gatens (North Carolina Museum of Natural Sciences, NCMNS) submitted a manuscript to the peer-reviewed journal *Ticks and Tick-borne Diseases*. They used museum specimens to study the recent pattern of Lyme disease emergence in Virginia and North Carolina. Specifically, they screened ear clips from study skins of white-footed deermice (housed at VMNH and NCMNS) for DNA from the Lyme disease pathogen.

In June, Dr. Moncrief and her collaborators presented a poster about their Lyme disease study at the annual conference of the American Society of Mammalogists, which was attended by more than 300 researchers (faculty members, university students, and employees of state and federal agencies) from throughout North America.

Also in June, *Journal of Mammalogy* published Dr. Moncrief's manuscript about healed skeletal fractures in eastern fox squirrels and eastern gray squirrels. Most of the specimens for this study are housed in the VMNH mammal collection. Her co-authors are VMNH Associate Curator of Recent Invertebrates Dr. Kal Ivanov, VMNH Biology Research Technician Ms. Liberty Hightower and Dr. Alfred Mead, who is on the faculty of Georgia College and State University. The complete citation is: Moncrief, N. D., Hightower, L., Mead, A. J., & Ivanov, K. (2022). Prevalence and location of survivable skeletal injuries in two North American tree squirrels (*Sciurus*). *Journal of Mammalogy* 103:663–671.

Dr. Moncrief continued working with Mss. Hightower, Cartmell, and Harris to prepare, install, document, and organize traditional specimens and frozen tissues of mammals and birds and their accompanying museum documents (electronic and hardcopies).

Dr. Moncrief continued working with other members of the VMNH Collections Committee to review and revise the VMNH Collections Policy and to draft VMNH Policies for Live Animals.

Professional Service and Other Duties

Dr. Moncrief serves on the Awards Committee of the Virginia Chapter of The Wildlife Society. In April, she and other committee members reviewed applications for a student scholarship to attend a training course. She also met virtually with other committee members several times to discuss application procedures for a new scholarship that will be awarded by the Chapter.

Dr. Moncrief continued serving on the Council of the Virginia Natural History Society (VNHS). She also continued serving (with Dr. Ivanov) as Co-Treasurer. As part of her duties as Co-Treasurer, she recorded dues payments for new and renewing VNHS members.

Scientific Programs, Exhibits, and Other Activities

Dr. Moncrief conducted tours of the mammal and bird collections for the Martinsville Garden Club in April and the Blue Ridge Foothills and Lakes Chapter of the Virginia Master Naturalists in May.

In early May, Dr. Moncrief was interviewed about her work on armadillos by Carrie Arnold, a reporter for National Geographic. Ms. Arnold's article ([Armadillos are expanding further into the U.S.—and why is still a mystery](#)) was published online in June.

For the VMNH Wildlife Festival in June, Dr. Moncrief arranged for Ms. Katie Martin, Wildlife Biologist in the Virginia Department of Wildlife Resources, to present a lecture on bobcats, bears, and coyotes in Virginia. Dr. Moncrief also facilitated participation in the festival by Dr. Karen Powers, Professor of Biology at Radford University, and several of her students, who are members of The Wildlife Society.

Hayden Bassett, Ph.D.
Assistant Curator of Archaeology

VMNH Assistant Curator of Archaeology Dr. Hayden Bassett focused much of his efforts on the VMNH Cultural Heritage Monitoring Lab's response to the war in Ukraine, beginning archaeological fieldwork for the Smith River Survey, and continuing fieldwork for the Patrick Henry Leatherwood project.

Research and Collections

Dr. Bassett continued fieldwork on the Patrick Henry Leatherwood project, a funded effort to locate the Henry County home of Patrick Henry, and other Revolutionary War sites in the area. While the driver of this fieldwork is to identify sites for interpretation for the upcoming Revolutionary War anniversary, the VMNH archaeology team is taking this opportunity to use archaeology to learn more life on what was Virginia's western frontier in the 18th century. In July, the VMNH Archaeology team identified several local Revolutionary War related sites, including a possible local fort site.

In May and June, the VMNH Archaeology Department officially began fieldwork for the Smith River Survey – a two-year archaeological survey of sites associated with Virginia's First Peoples along the Smith River in Henry County, VA. Bassett and his team visited and sampled three sites on the lower Smith River, which their modeling determined to be highly vulnerable to flooding events. They determined that two of the three sites had been impacted by flooding. The VMNH Archaeology team hosted a cultural heritage rescue professional from Guatemala, and used this initial fieldwork as training opportunity for methods that he could apply to Mayan sites vulnerable to flooding in Guatemala. The VMNH Archaeology team will continue to sample and assess sites along the Smith River in the coming months.

In collaboration with the Smithsonian Institution, the VMNH's Cultural Heritage Monitoring Lab (CHML), under the direction of Dr. Bassett, made significant progress this quarter on projects in Virginia, Afghanistan, Guatemala, and Ukraine. Through the CHML at VMNH, Dr. Bassett continues to lead a team of 6 cultural heritage professionals and 2 virtual interns in data production and satellite imagery analysis. This included a rapid emergency response to identify cultural heritage impacted by the June 2022 earthquake in Afghanistan, in close collaboration with NASA JPL. As the producer and curatorial repository of these new digital collections, the VMNH Archaeology Department has expanded its digital collections holdings by nearly 16,400 "objects" since May 2022, and anticipates further growth in digital collections with each new quarter (a current total of A total of 108,400). A total of 80,400 digital objects in the VMNH's CHML collections were requested/accessed by outside researchers between early May and later July 2022. Approximately 48,000 of these digital objects concerned Virginia archaeology sites.

Most of Dr. Bassett's research efforts this quarter were dedicated to the leading role played by the VMNH's Cultural Heritage Monitoring Lab (CHML) in the US response to the destruction of museums, archaeological sites, and other cultural heritage sites in Ukraine. Dr. Bassett and his team developed an approach to monitoring cultural heritage using remote sensing, and other satellite-based technologies. Since late

February, the CHML team at VMNH has been monitoring over 28,000 cultural heritage sites in Ukraine every 48 hours using satellite sensors and imagery. Impacts to cultural heritage are reported to a wide spectrum of stakeholders in academia and research, government, on the ground in Ukraine, and the general public. The lab's capabilities have grown significantly since February in response to this emergency need, and through a number of new public and public-private partnerships. His collaborators in this effort include the Smithsonian Institution and the University of Maryland. Since May 10, Dr. Bassett has served as the Co-PI on the US Department of State's efforts to identify damages to cultural heritage from the conflict in Ukraine.

Between early May and late July, Dr. Bassett gave 18 presentations on the findings of the VMNH's Cultural Heritage Monitoring Lab (CHML). These presentations were given virtually to the Smithsonian Institution, UNESCO, the US Department of State, Ukrainian heritage professionals, the Cultural Rescue Center of Guatemala, and Virginia students (college-aged). Additionally, Dr. Bassett and his team authored and delivered reports of findings to key stakeholders for situational awareness, media, ground responses for protective measures, and research-driven questions on destruction of cultural property. This includes a presentation to the US Assistant Secretary of State, the Ukrainian Ambassador to the US, and other Ukrainian officials. Since early May, the work of Dr. Bassett and the CHML team at VMNH has been featured in *The Guardian*, the *Art Newspaper*, *Wilson Quarterly*, CBC Radio, and *La Croix*.

Dr. Bassett and his team also published several peer-reviewed publications this quarter. In early July, he and his collaborators published "Analysis of Damage to Ukrainian Cultural Heritage Sites: A Case Study as of 08 June 2022" in *Conflict Observatory*. In mid-July, Bassett and his team published "Impacts to Cultural Heritage in Ukraine" in *Tearline*. Additionally, he and his team's manuscript to the *Journal of Preservation Education and Research* (PER), submitted the previous quarter, has been accepted for publication. A fourth invited manuscript, for *Text & Image* (published by the University of Kiev), is currently under review. Last, Bassett and his staff are finishing a fifth (non-peer reviewed) manuscript, which they were invited to submit to *The SAA Archaeological Record*.

Education and Outreach

In June, Dr. Bassett served on an expert panel for UNESCO called "Heritage from Space for Peace." Bassett was one of five global experts on the matter, and the only US expert invited to the Paris-based event. The panel was attended by 175 professionals from around the world. Also in June, Dr. Bassett gave a presentation to the entire staff of the Smithsonian Institution on the CHML at VMNH. It was attended by over 200 professionals from across the Smithsonian museums.

The VMNH Archaeology department worked with several colleges and universities this quarter. Dr. Bassett and VMNH Staff Archaeologist Madeleine Gunter Bassett continued to work 2 paid virtual interns at the undergraduate and graduate level. In June, the U.S. Department of State confirmed that they will provide the VMNH Archaeology Department an additional 4 virtual intern positions through the Virtual Student Federal Service (VSFS) program. This year-long internship will begin in September. Between early May and late July 2022, the interns and associated virtual volunteers contributed a combined 400 hours to the CHML at VMNH.

Bassett was interviewed for two podcasts this quarter: the VMNHCast and the Smithsonian's SideDoor podcast. In the VMNHCast, he discussed the VMNH Archaeology Department's Smith River Survey. In the Smithsonian's SideDoor podcast, he discussed cultural rescue initiatives and the VMNH's use of satellite technology to monitor impacts to cultural heritage. SideDoor has consistently remained in the Top 10 charts of Apple Podcasts, is in the top 1% of all podcasts in terms of listenership per episode, and has over 3.5 million listens to date.

Dr. Bassett responded to three public requests for identification of artifacts, both of them from Virginia. Two artifact identifications were made in-person (masked and distanced) either at the museum, and one on-site.

Professional Service

Dr. Bassett continued his duties as Vice President of the Board of Trustees for Falmouth Heritage Renewal, an international historic preservation non-profit. He also continued his appointment as a Research Associate at the Smithsonian Institution to support international efforts and contributions made through VMNH's new Cultural Heritage Monitoring Lab. He also continued his duties to the Legislative Affairs Committee of the Council for Virginia Archaeologists (CoVA).

From May to July, Dr. Bassett co-organized 8 meetings of the Culture Conflict Resource Network (CCRN), an NSF-funded group of collaborative researchers working on research surrounding the impacts of armed conflict on cultural heritage. The VMNH, through the Cultural Heritage Monitoring Lab (CHML), is a collaborative partner of the CCRN, along with the University of Pennsylvania, the Smithsonian, and several other institutions. Dr. Bassett presents the findings of his lab at these meetings.

This quarter, Dr. Bassett and VMNH staff archaeologist Madeleine Gunter Bassett continued to fulfill their duties in the Archaeological Society of Virginia (ASV). In these roles, VMNH Archaeology staff provide direction, technical review, grant approvals, among other tasks for state-wide archaeological research for the foreseeable future. From May to July, Dr. Bassett was consulted on 9 occasions by VA state and US federal agencies, and international institutions to implement his technical methods for using satellite imaging and remote sensing to document ground disturbance, and/or destruction of cultural heritage in conflict zones and after natural disasters. The consultations included contributions of expertise and virtual delivery of training.

Adam Pritchard, Ph.D.
Assistant Curator of Paleontology

- **Dr. Pritchard was on medical leave from the museum from March 23 to May 9 due to a long-running illness. He underwent a transition period of ½ time work from May 9 to May 16, before returning to work full time.**
- Dr. Pritchard oversaw expansions to the VMNH collections via donations from Virginia natives in northern VA and the Richmond area. These include 100s of fossils of both vertebrate and invertebrate animals.
- Dr. Pritchard presented educational programs for the VMNH Wildlife Festival and the OLLI program at UVA.
- Dr. Pritchard contributed to the NSF GeoPaths grant in his role as prospective co-PI. The grant, led by Dr. Brooke Haiar of the University of Virginia, would provide field and museum-based education opportunities for students of underrepresented groups in the geosciences field.
- Dr. Pritchard provided fossils and contributed to displays for a column case exhibit, "The Oldest Fossils of Virginia."

Research & Collections

- Dr. Pritchard oversaw the intake of several hundred new specimens for the paleontology collections:
 - Triassic (225 million year old) fish, shark teeth, and reptile teeth from Ashland, VA.
 - Jurassic (200 million year old) fishes.
 - Cenozoic (50 million year old) snakes.
 - Early (370-300 million year old) fishes.
- Dr. Pritchard oversaw research visits from scientists from the Paleobiological Institute of Poland (Warsaw, Poland), the USGS (Herndon, VA), and George Washington University (Washington, DC).
- Dr. Pritchard completed a manuscript review on Triassic reptile anatomy for the *Bulletin of the New Mexico Museum of Natural History*.
- Dr. Pritchard contributed content and edits to the grant documents for the GeoPaths NSF grant in his role as co-PI.
- Dr. Pritchard worked on two manuscripts on vertebrate paleontology. One details the hindlimb anatomy of drepanosaurs, a group of chameleon analogues from the Triassic Period (250-200 million years old). The other details new discoveries of lizards and snakes from northern Virginia (50 million years old).

Education & Outreach

- Dr. Pritchard oversaw collections tours for several groups during this quarter:
 - 2 Richmond natives, one a donor of fossil specimens.
 - 15 master naturalists from the South Piedmont Chapter.
- Dr. Pritchard oversaw a job shadow program for a student from the Virginia School for the Deaf.
- Dr. Pritchard presented a program on small vertebrate fossils for the VMNH Wildlife Festival.

- Dr. Pritchard presented a lecture on the fossil record of Virginia for the OLLI program at the University of Virginia (Charlottesville, VA).

Exhibits

- Dr. Pritchard coordinated with Research Associate William Schmactenberg and Exhibits Director Jessica Davenport on the column case exhibit “Oldest Fossils of Virginia.” This display is mostly made up of VMNH invertebrate fossils.

Research and Collections

Jill K. Harris, Registrar

Four (4) collections acquisitions were recorded for 212 specimens and 58 vials of specimens. These specimens were added to the invertebrate zoology and mammal collections.

Five (5) outgoing loans were recorded this quarter from the paleontology and invertebrate zoology collections. Loans were made to: The American Museum of Natural History, Penn State University, Virginia Tech, University of Lynchburg, and Lewis & Associates.

In efforts to standardize electronic data in the collections management database, Ms. Harris modified one or more fields in approximately 37,100 electronic records.

Haley Cartmell, Collections Manager

Curators and staff modified/updated 38,063 existing records and added 122 new records to the VMNH collections databases Proficio (all museum collections) and EGEMS (paleontological collections only).

**VIRGINIA MUSEUM OF NATURAL HISTORY
RESEARCH AND COLLECTIONS ACTIVITIES**

**Report to the Board of Trustees
July-September 2022**

**Kaloyan Ivanov, Ph.D.
Associate Curator of Invertebrate Zoology**

- Drs Ivanov and Means, and colleagues from Brazil have a manuscript accepted at *Zoologia*.
- Drs Ivanov and Means, and colleagues from Brazil submitted a manuscript to the *International Journal of Speleology*.
- Dr. Ivanov, Curator of Mammals Dr. Nancy Moncrief, Deputy Director Ryan Babrber, and Education Manager Christy Deatherage received funding from the Institute of Museum and Library Services for their *Scope It Out!* proposal.
- Dr. Ivanov participated in VMNH's Dino Festival and interacted with 2,000+ visitors.
- Dr. Ivanov gave an interview for the Bulgarian National Radio regarding his work at VMNH.

Research and Collections

Drs Ivanov and Means (VMNH), R. Bouzan, Drs A. D. Brescovit and L. F. M. Iniesta (Instituto Butantan, Brazil) and T. M. Almeida (Instituto Nacional de Pesquisas da Amazônia, Brazil) have a paper accepted at *Zoologia*. The paper focuses on the Amazonian millipede genus *Leptherpum* (Polydesmida: Chelodesmidae) and includes the description of three new species.

Drs Ivanov and Means, R. Bouzan, Drs A. D. Brescovit and L. F. M. Iniesta, and Dr. R. L. Ferreira (Universidade Federal de Lavras, Brazil) submitted a manuscript to the *International Journal of Speleology* focusing on the worldwide distribution of the cavernicolous millipedes of the family Chelodesmidae (Diplopoda: Polydesmida). The paper is the first account of the cave-dwelling members of the family and includes a summary of all Chelodesmidae taxa reported from caves, maps their worldwide distribution, and offers a discussion of the troglomorphic features of the group.

VMNH Research Associate and Clemson University graduate student C. Harden, VMNH Biology Technician L Hightower, and Dr. Ivanov are completing a manuscript (to be submitted to *Subterranean Biology*) on the efficiency of two subterranean trap designs for targeting endogaeic invertebrate taxa in the Appalachian Highlands of the eastern US.

Dr. Ivanov and Virginia Tech colleagues (former graduate student M. Malone, Drs R. Schurch and S. Taylor) are completing work on a manuscript focusing on the range expansion of the invasive Red Imported Fire Ant, *Solenopsis invicta* Buren, in Virginia. The manuscript (to be submitted to *PlosOne*) also explores the potential spread of this notorious invasive species across the United States using predictive distribution modelling.

Drs Means and Ivanov, R. Bouzan, Drs L. F. M. Iniesta and A. D. Brescovit, D. Martinez-Torres (Universidad Nacional de Colombia, Colombia), and L. F. Vasquez-Valverde (Virginia Tech, Virginia) are completing work on a manuscript (to be submitted to *European Journal of Taxonomy*) focusing on the South American millipede genus *Dibolostethus* (Polydesmida: Chelodesmidae). The manuscript includes the description of two new species (one of which from VMNH's invertebrate collections), and a summary of the Chelodesmidae taxa known from the Tropical Andes Biodiversity Hotspot.

Drs Ivanov and Means, R. Bouzan, Drs A. D. Brescovit and L. F. M. Iniesta are drafting a manuscript on the biogeography, endemism, and conservation of Brazilian Spirostreptida. The work (to be submitted to *Journal of Biogeography*) is the first study focusing on the biogeography of Neotropical Spirostreptida employing a multi-approach analysis to detect areas of endemism and patterns of distribution of the members of the order in Brazil.

In late September, Drs Ivanov and Means received the first DNA sequences based on extractions at VMNH's molecular lab. The data, which covers a variety of invertebrate taxa (e.g., terrestrial isopods, millipedes, ants), is in support of a number of new and ongoing projects.

Dr. Ivanov conducted fieldwork at multiple locations in four Bulgarian provinces (Blagoevgrad, Plovdiv, Ruse, and Veliko Tarnovo), one Romanian county (Giurgiu), and one Greek region (East Macedonia and Thrace) in support of ongoing research projects.

Drs Ivanov and Means, L. Hightower, and Collections intern R. George completed fieldwork and sample processing for a project focused on the leaf-litter and soil arthropod fauna of a private property located at the foothills of the Blue Ridge Mountains in Stuart, VA. The work, which is partly funded by the property's owner and longtime museum supporter L. Reagan, has resulted in the collection of an unusual species of terrestrial isopod (possibly undescribed *Ligidium*), a new species of millipede (*Nannaria*), two undescribed beetle species (*Anilinus* and *Arianops*), and a rare ant species (*Proceratium creek* De Andrade). The collected materials are temporarily stored in the Recent Invertebrates lab awaiting processing.

Dr. Ivanov oversaw the acquisition of Diptera expert Dr. B. Steinly insect collection (Miami U, Ohio). L. Hightower and Dr. Ivanov processed and inventoried the materials which comprise 23,525 pinned/pointed insects (primarily Ephydriidae and Formicidae). The collection is currently temporarily stored in VMNH's Dry Biology awaiting curation and incorporation into the museum's holdings.

L. Hightower and R. George, with help from Dr. Ivanov, completed the inventory and transfer of 1,809 backlogged bee specimens, donated by K. LeCroy (UVA), to VMNH's invertebrate holdings.

VMNH Collections Manager H. Cartmell, with help from Dr. Ivanov, completed the organization and rehousing of returned loans of 134 *Ummidia* (Araneae: Halonoproctidae) spiders (including the holotypes of *U. gingoteague* Godwin & Bond,

and *U. neilgaimani* Godwin & Bond), and 2,361 ethanol-preserved Ephemeroptera identified by Dr. J. Bond (UC Davis), and Dr. M. Meyer (Christopher Newport U), respectively.

H. Cartmell, with help from Dr. Ivanov, is continuing work on inventorying and cataloging VMNH's Mollusca (mollusks) holdings.

Dr. Ivanov reviewed and updated Recent Invertebrates annual acquisition plans. (completed September 19)

Dr. Ivanov, Curator of Mammals Dr. Nancy Moncrief, Deputy Director Ryan Babrber, and Education Manager Christy Deatherage were awarded \$37,780 from the Institute of Museum and Library Services for their *Scope It Out!* proposal. The available funds will be used to convert an existing, underutilized VMNH space into a modern multidisciplinary research and education microscopy laboratory. Eighteen stereomicroscopes were purchased in September 2022.

Education & Outreach

Dr. Ivanov and museum staff participated in VMNH's Dino Festival, which offered a variety of displays and activities that ranged from invertebrate and vertebrate fossils from the museum's collections to dino-themed children activities and crafts. The two-day event, was VMNH's most successful festival to date attracting 4,604 children and adults from Virginia, North Carolina, and 12 additional states. (July 22-23)

Collections intern Rosie George (College of William & Mary) completed her internship in the Department of Recent Invertebrates in mid-August. During her work at VMNH, Rosie assisted with the curation, maintenance, and management of the museum's invertebrate collection; fieldwork; processing of samples; specimen preparation, labeling, rehousing, and cataloging; and outreach.

Dr. Ivanov responded to arthropod identification and information requests to individuals from Columbus, OH, and South Boston, VA.

Media

"Single-minded stinger." *Virginia Living* magazine article by C. Kettlewell, Virginia. (August 1)

VMNHcast #7: "The Ants of Virginia". VMNHcast hosted by Ben Williams, Virginia Museum of Natural History, Martinsville, Virginia. (August 8)

"Early on Sunday". Bulgarian National Radio Horizont interview with A. Pencheva, Ecomuseum & Aquarium, Ruse, Bulgaria. (August 17)

Professional Service

Dr. Ivanov and members of VMNH Biology Research Technician Search Committee began review of applications in late September.

Dr. Ivanov copy edited four articles for the Virginia Natural History Society's periodical *Banisteria* (Volume 56, 2022). (completed July 13, 14, and September 20)

Drs Ivanov and Means are serving as co-editors of VMNH's *Memoirs* series for a manuscript titled "The groundwater isopods of Virginia (Isopoda: Asellidae and Cirolanidae)" by Dr. J. J. Lewis and colleagues. Manuscript reviews were completed in late September.

Nancy D. Moncrief, Ph.D.
Curator of Mammalogy

- A manuscript about Lyme disease emergence in Virginia co-authored by Dr. Moncrief was accepted for publication by the peer-reviewed journal *Ticks and Tick-borne Diseases*.
- Dr. Moncrief was interviewed about her work on armadillos for a story that aired on WVTF and is also available as a podcast on the National Public Radio website

Research and Collections

In July, Dr. Moncrief resumed a collaboration with Dr. John Scheibe (Professor Emeritus of Biology at Southeast Missouri State University). They previously published an article describing geometric morphometric comparisons of the jaws of several tree squirrel species. For the current work, they are using the extensive collection of squirrel specimens in the VMNH Mammal Collection to expand their previous work. Ms. Liberty Hightower is photographing all the squirrel jaws for Drs. Moncrief and Scheibe, and she will participate in the analyses.

In August Dr. Moncrief and her collaborators Dr. R. Jory Brinkerhoff and Ms. Meghan Leber (University of Richmond) and Ms. Lisa Gatens (North Carolina Museum of Natural Sciences, NCMNS) learned that their manuscript has been accepted for publication in the peer-reviewed journal *Ticks and Tick-borne Diseases*. They used museum specimens to study the recent pattern of Lyme disease emergence in Virginia and North Carolina. Specifically, they screened ear clips from study skins of white-footed deermice (housed at VMNH and NCMNS) for DNA from the Lyme disease pathogen.

Throughout the quarter, Dr. Moncrief continued working with Mss. Hightower, Cartmell, and Harris to prepare, install, document, and organize traditional specimens and frozen tissues of mammals and birds and their accompanying museum documents (electronic and hardcopies).

Professional Service and Other Duties

In July Dr. Moncrief shepherded the process of transferring VMNH's federal permit for housing a live colony of leafcutter ants from former VMNH Exhibits Manager Ms. Jessica Davenport to VMNH Registrar Ms. Jill Harris before Ms. Davenport left VMNH.

In August Dr. Moncrief met with several members of the Virginia Chapter of The Wildlife Society to begin planning the Chapter's annual conference for 2023. Tentative plans are for the conference to take place in Martinsville in February 2023. Workshops and technical presentations will occur at New College Institute, and the annual dinner will be held at VMNH. Attendance averages 125 members and included professionals from multiple state and federal agencies as well as faculty members and students from several Virginia colleges and universities (including Radford, George Mason, Virginia Tech, Bridgewater, Randolph Macon, and Richmond).

In August, Institute of Museum and Library Services (IMLS) notified VMNH that IMLS will fund a grant proposal (for about \$35,000) to purchase equipment for a microscope lab that will serve as a resource for VMNH science education programs and outreach activities. Dr. Moncrief worked with Associate Curator of Recent Invertebrates Dr. Kal Ivanov, Education Manager Christy Deatherage, and Deputy Director Ryan Barber to prepare and submit this proposal. Dr. Moncrief also met with Ms. Deatherage and WDBJ reporter Makayla Shelton for a report about the new lab that aired on WDBJ.

Dr. Moncrief recently served on a panel for the National Science Foundation. She will provide more details during the committee meeting.

Scientific Programs, Exhibits, and Other Activities

In July, Dr. Moncrief participated in VMNH's Dinosaur Festival. She worked at the admissions table for VMNH and ASTC members with Ms. Charlotte Harter.

In late August Dr. Moncrief taught a session about mammals of Virginia and techniques used to study mammals for the Piedmont Master Naturalists' basic training course.

In August, Dr. Moncrief recorded a VMNH podcast about armadillos in Virginia with VMNH Science Administrator Mr. Ben Williams. She also recorded an interview about Virginia armadillos with West Virginia Public Radio reporter Mason Adams; this segment aired in late September on WVTF's Radio IQ and is also available as a podcast on the National Public Radio website:

<https://www.npr.org/podcasts/381443598/inside-appalachia>

Hayden Bassett, Ph.D.
Assistant Curator of Archaeology

Through additional grants awarded, the VMNH Archaeology Department has grown to 18 personnel as of October 2022. This includes the Department Head VMNH Assistant Curator of Archaeology Dr. Hayden Bassett, VMNH Senior Staff Archaeologist Madeleine Gunter-Bassett, the three core staff of the Cultural Heritage Monitoring Lab (William Welsh, Dr Kate Harrell, and Damian Koropecykj), two part-time analysts, and 11 virtual interns.

VMNH Archaeology Department: AUG-OCT 2022

- Full-time:
 - Hayden Bassett, PhD. (Dept. Head: Assistant Curator of Archaeology & CHML Director)
 - Madeline Gunter-Bassett, M.A. (Senior Staff Archaeologist & CHML Senior Analyst)
 - William Welsh, M.M.A. (CHML Director of Operations)
 - Katherine Harrell, Ph.D. (CHML Director of Education)
 - Damian Koropecykj, M.A. (CHML Senior Analyst)
- Part-Time:
 - Kaitlyn Fitzgerald, M.A. (CHML Analyst)
 - Abigail Maher (CHML Analyst)
- Current Interns:
 - Sydney Lynch, *University of Mississippi*
 - Audrey Crouch, *College of William & Mary*
 - Katherine Rogers, *Georgetown University*
 - Samuel Meade, *Yale University*
 - Eli Tsung, *Yale University*
 - Nicholas Cromwell, *UC Santa Barbara*
 - Sophia Rodriguez-Bell, *University of Chicago*
 - Stefany Carty, *Saint Louis University*
 - Daphne Moss, *McGill University*
 - Christina Grossen, *Seton Hall University*
 - Henry McDaniel, *University of Pennsylvania*

This quarter, Dr. Bassett focused his teams' efforts on new terrestrial and underwater initiatives with archaeology in Virginia, VMNH Cultural Heritage Monitoring Lab's response to the war in Ukraine, continuing archaeological fieldwork for the Smith River Survey, continued focus on VMNH's digital and physical collections, and continuing fieldwork for the Patrick Henry Leatherwood project.

Research and Collections

This quarter, the VMNH Archaeology Department took on the additional responsibility of managing collections for the VMNH Geology Department. This effort is led by VMNH Senior Staff Archaeologist Madeleine Gunter-Bassett because of her combined training in Archaeology and Geology. In October, Madeleine organized the geology collections room to bring it up to VMNH standards for curation and researcher access. Madeleine will facilitate future management and researcher access for these specimens.

From August to October, the VMNH Archaeology Department continued work on the Smith River Survey – a two-year archaeological survey of sites associated with Virginia’s First Peoples along the Smith River in Henry County, VA. Bassett and his team refined their geospatial model of the Smith River, and created new ways to predict impacts to archaeological sites in the region. They also developed a new method to rapidly assess the impacts of future flooding events using satellite radar detection of flood waters on/near archaeological sites.

VMNH Archaeologist Madeleine Gunter-Bassett continued her research on sourcing copper found on archaeological sites associated with Virginia’s First Peoples. She and her co-authors from VCU and the Field Museum used elemental sourcing methods to identify the likely sources of copper used to make copper artifacts. Contrary to long held beliefs, Gunter-Bassett and her colleagues identified that much of the copper found on contact-period sites in Virginia is likely a combination of native copper and European trade copper. Native copper was traded through longstanding North American trade networks that extended as far as the Great Lakes region.

Madeleine also began a NAGPRA (Native American Graves Protection and Repatriation Act) inventory of the VMNH Archaeology collections. A NAGPRA inventory is conducted by an institution to determine if any objects in the collections could be associated with Native American burials (to include human remains and/or associated burial objects). Dr. Hayden Bassett continued fieldwork on the Patrick Henry Leatherwood project, a funded effort to locate the Henry County home of Patrick Henry, and other Revolutionary War sites in the area. While the driver of this fieldwork is to identify sites for interpretation for the upcoming 250th Revolutionary War anniversary, the VMNH archaeology team is taking this opportunity to use archaeology to learn more on life in what was Virginia’s western frontier in the 18th century. This quarter, the VMNH Archaeology spent time locating and digitizing early 19th century maps of Henry County held in the collections of the Library of Virginia and testing several potential field sites. The team discovered one map that Dr. Bassett believes to be the earliest depiction on Martinsville/court-house square.

In collaboration with the Smithsonian Institution, the VMNH’s Cultural Heritage Monitoring Lab (CHML) under the direction of Dr. Bassett made significant progress this quarter on projects in Virginia, Guatemala, and Ukraine. Through the CHML at VMNH, Dr. Bassett continues to lead a team of 6 cultural heritage professionals and 11 virtual interns in data production and satellite imagery analysis. In October, the CHML team began developing a predictive model of prehistoric underwater archaeological sites in Virginia. They are working in close collaboration with the State Underwater Archaeologist to further develop and test this model for future implementation to inform Virginia cultural resource management, planning/development, and policy. While the VMNH Archaeology Lab and CHML currently have trained personnel to perform underwater archaeology, they will continue to build capacity in equipment and capabilities to better support the Virginia Department of Historic Resources and other state agencies in locating and protecting the Commonwealth’s underwater cultural heritage.

As the producer and curatorial repository of digital collections, the VMNH Archaeology Department has expanded its digital collections holdings by nearly 46,200 “objects”

since August 2022, and anticipates further growth in digital collections with each new quarter. The new objects include cultural heritage site locations in Virginia, Ukraine, and Guatemala. A total of 32,100 digital objects in the VMNH's digital collections were requested/accessed by outside researchers between August and October 2022. With the current physical storage space limitations at the VMNH, the Archaeology Dept will continue to focus on development and growth of its digital collections for public benefit. A part Dr. Bassett's research efforts this quarter were dedicated to the leading role played by the VMNH's Cultural Heritage Monitoring Lab (CHML) in the US response to the destruction of museums, archaeological sites, and other cultural heritage sites in Ukraine. Dr. Bassett, Dr. Harrell, Damian Koropecykj, Madeline Gunter-Bassett, Bill Welsh, and the extended team developed an approach to monitoring cultural heritage using remote sensing, and other satellite-based technologies. Since late February, the VMNH-CHML team at VMNH has been monitoring over 28,000 cultural heritage sites in Ukraine every 48 hours using satellite sensors and imagery. Dr. Bassett serves as the Co-PI on a \$15 million grant through the US Department of State, in which the VMNH plays an important role. This work has resulted in four publications this quarter and international recognition of the VMNH as a leading research institution at the nexus of archaeology and international affairs. The research output of the CHML at VMNH is hosted by the *Conflict Observatory* and *Tearline*.

This quarter, Dr. Bassett and the VMNH-CHML team were also awarded \$109,000 Rockefeller Grant through the Smithsonian to further expand and sustain this applied international research. Additionally, through the work for Bill Welsh, the VMNH signed an MOU to partner with Premise, who has agreed to provide an in-kind donation to the VMNH in the form of credits to be used on its data collection platform.

Publications

Dr. Bassett and his team published four peer-reviewed, open-access publications this quarter:

Bassett, Hayden F., Harrell, K., Koropecykj, D., Gunter-Bassett, M., & Welsh, W. (2022). "Cultural Heritage and the Problem of Prioritization." *Text and Image: Essential Problems in Art History*, 1(13), 43–50. Available at: <https://txim.history.knu.ua/article/view/161>

Bassett, H. F., Aronson, J., Cil, D., Hanson, K., Meharry, J. E., Narimanova, N., Averyt, K., Carroll, C., Koropecykj, D. V., Harrell, K., Welsh, W., Wegener, C., and Daniels, B. I. (2022). "Potential Damage to Ukrainian Cultural Heritage Sites, 24 February 2022 and 30 September 2022." In *Conflict Observatory*. Virginia Museum of Natural History, Cultural Heritage Monitoring Lab; University of Maryland, Center for International Development and Conflict Management; and Smithsonian Institution, Smithsonian Cultural Rescue Initiative. Available at: <https://hub.conflictobservatory.org/portal/sharing/rest/content/items/8e66ddb9d46442a2af3656bc01c4752b/data>

Bassett, H. F., Aronson, J., Cil, D., Hanson, K., Meharry, J. E., Narimanova, N., Averyt, K., Carroll, C., Koropecykj, D. V., Harrell, K., Welsh, W., Wegener, C., and Daniels, B. I. (2022). "Potential Damage to Ukrainian Cultural Heritage Sites, 24 February 2022 to 31 August 2022." In *Conflict Observatory*. Virginia Museum of

Natural History, Cultural Heritage Monitoring Lab; University of Maryland, Center for International Development and Conflict Management; and Smithsonian Institution, Smithsonian Cultural Rescue Initiative. Available at: <https://hub.conflictobservatory.org/portal/sharing/rest/content/items/81d7ff95814c4f828041e879cde777c1/data>

Koropeckyj, D., Bassett, H., Harrell, K., Welsh, W., and Gunter-Bassett, M. (2022). "Impacts to Cultural Heritage in Ukraine: July 01 to August 31, 2022" in *Tearline*. Available at: https://www.tearline.mil/public_page/impacts-to-cultural-heritage-in-ukraine-july-through-august-2022/

Education and Outreach

In October, Dr. Bassett served on an expert panel (virtually) in The Hague, Netherlands for the Cultural Property Protection Leadership Meeting. Bassett was one of a handful of global leaders teaching cultural professionals from around the world new methods in Cultural Property Protection. The event was co-sponsored by the Smithsonian Institution and Cultural Emergency Response (CER).

The VMNH Archaeology department worked with several colleges and universities this quarter. The VMNH Archaeology Department brought on 11 virtual interns under CHML Director of Education Dr. Kate Harrell through the Virtual Student Federal Service (VSFS) program. Current student interns in the department represent 10 different universities. This year-long internship began September and will run through May 2023. The virtual volunteers each contribute 10 hrs/week to the CHML at VMNH for the entire academic school year for credit through their respective colleges and universities. Additionally, Dr. Joe Kieper and Dr. Bassett met with Fishburne Military Academy in Waynesboro, VA and the Virginia Military Institute (VMI) to identify opportunities for partnership and student engagement.

In September, Dr. Bassett was featured twice in national media: [an interview on National Public Radio \(NPR\)'s program 1A](#), and a [television appearance on PBS Newshour](#).

Between September and October, Dr. Bassett and CHML archaeologist Bill Welsh were invited to Guatemala to teach 20 local professionals how to identify underwater archaeological sites and map threats and impacts to the country's Mayan archaeological sites. Over the course of 9 days, Bassett and Welsh provided field and classroom instruction, led underwater archaeological surveys in Lake Peten (identifying both Mayan and Spanish colonial artifacts), and conducted field assessments on regional Mayan cities. This partnership will continue in 2023 to lend technical specialty unique to the VMNH to those who request assistance and to build relationships for upcoming VMNH repatriation efforts.

Dr. Bassett responded to two public requests for identification of artifacts, both from Virginia. One artifact identification was made in-person, and one was made virtually. Additionally, Dr. Bassett and Madeleine Gunter-Bassett conducted a site identification in Bassett, VA.

Professional Service

Dr. Bassett continued his duties as Vice President of the Board of Trustees for Falmouth Heritage Renewal, an international historic preservation non-profit. He also continued his appointment as a Research Associate at the Smithsonian Institution to support international efforts and contributions made through VMNH's new Cultural Heritage Monitoring Lab.

From August through October, Dr. Bassett co-organized 10 meetings of the Culture Conflict Resource Network (CCRN), an NSF-funded group of collaborative researchers working on research surrounding the impacts of armed conflict on cultural heritage. The VMNH, through the Cultural Heritage Monitoring Lab (CHML), is a collaborative partner of the CCRN, along with the University of Pennsylvania, the Smithsonian, and several other institutions. Dr. Bassett presents the findings of his lab at these meetings.

This quarter, Dr. Bassett and VMNH staff archaeologist Madeleine Gunter Bassett continued to fulfill their duties in the Archaeological Society of Virginia (ASV) and Council for Virginia Archaeologists (CoVA). In their roles on committees in these organizations, VMNH Archaeology staff provide direction, technical review, grant approvals, among other tasks for state-wide archaeological research for the foreseeable future. In October, they attended the quarterly meeting of the CoVA, representing the VMNH in Virginia Archaeology.

From August to October, Dr. Bassett was consulted on 6 occasions by VA state agencies, US federal agencies and law enforcement entities, and international institutions to implement his technical methods for using satellite imaging and remote sensing to document ground disturbance, and/or destruction of cultural heritage in conflict zones and after natural disasters. The consultations included contributions of technical and policy-related expertise, as well as virtual delivery of training.

Adam Pritchard, Ph.D.
Assistant Curator of Paleontology

- Dr. Pritchard organized and executed a large multi-institutional field trip to his field site in the Triassic of Ashland, Virginia, seeking to strengthen collaborations and receive advice on best practices moving forward. Participants involved came from the Smithsonian Institution, Virginia Tech, Columbia University, and the North Carolina Museum of Natural Sciences.
- Dr. Pritchard (as a co-PI) submitted a grant to the National Science Foundation Excellence in Research program with a collaborative team from Howard University. Led by VMNH research associate Ray Bernor, the grant would fund collections expansion, exhibit development, and educational programs related to horse evolution.
- Dr. Pritchard developed a display for the 2022 Dinosaur Festival featuring a complete leg of a long-necked sauropod dinosaur. The festival attracted over 4,000 participants over a two-day period.
- Dr. Pritchard traveled to Virginia Tech multiple times for collaborative trips to complete his manuscript on Triassic vertebrate anatomy, discuss new 3D modeling techniques and projects, and initiate new collaborative efforts.

Research and Collections

- Dr. Pritchard oversaw two field trips to the Ashland Triassic Site: one with a student from GWU in July and a large, multi-institutional collaboration in September.
- Dr. Pritchard oversaw three in-person paleontology collections visits from researchers from Virginia and California.
- Dr. Pritchard continued work on a Triassic vertebrate descriptive manuscript for the journal *Anatomical Record*. Submission will occur in Q4 2022.
- Dr. Pritchard developed three-dimensional reconstructions of flying reptile bones in collaboration with a team from VT and Yale University.
- In collaboration with technician Lucy Treado, Dr. Pritchard developed the ongoing Petra cave cat project:
 - New preparation techniques to better protect the specimen.
 - Purchase of a C14 analysis of the specimen (expected in Q4 2022).

Education and Outreach

- Dr. Pritchard presented on the basics of paleontology for the South Piedmont chapter of the Virginia Master Naturalists.
- Dr. Pritchard provided information on paleontology careers for two Virginia undergraduate students.
- Dr. Pritchard provided curation advice to the Middlesex Museum on the best ways to safely maintain a whale skull.
- Dr. Pritchard provided specimen identifications for a private resident from Greenville, North Carolina.

Grants and Funding

- In collaboration with Research Associate Dr. Ray Bernor and a team from Howard University, Dr. Pritchard submitted a grant to the EiR program of the National Science Foundation focused on research of and education about the evolution of horses. The program would provide over \$70,000 for specimen printing, educational programs, and exhibit development.
- Dr. Pritchard began negotiating the sale of casts of VMNH specimens to the York County Museum, re-initiating the income stream from paleontology cast sales.

Professional Service

- Dr. Pritchard reviewed four manuscripts on reptile paleontology for the *Journal of Vertebrate Paleontology*, *Annals of the Carnegie Museum*, and *PloS One*.
- Dr. Pritchard wrote, edited, and reviewed content for the Ranger Rick *ZooDinos*
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Research and Collections

Jill K. Harris, Registrar

Seven (7) collections acquisitions were recorded for 216 specimens and 58 vials of specimens. These specimens were added to the invertebrate zoology and mammal collections.

Six (6) outgoing loans were recorded this quarter from the paleontology and invertebrate zoology collections. Loans were made to: The American Museum of Natural History, Penn State University, Virginia Tech, University of Lynchburg, and Lewis & Associates.

In efforts to standardize electronic data within the collections management database, Ms. Harris modified one or more fields in approximately 30,250 electronic records.

Haley Cartmell, Collections Manager

Curators and staff modified/updated 20,026 existing records and added 152 new records to the VMNH collections databases Proficio (all museum collections) and EGEMS (paleontological collections only).

PEOPLE SERVED DATABASE printed 7/28/2022
Summary

# of Activities	TYPE OF ACTIVITY	PROFESSIONALS AND 13+ STUDENTS	K-12 STUDENTS	K-12 TEACHERS	PUBLIC			TOTAL #	
2	Conference presentations (A)	312	0	0	0			312	
6	Meetings chaired (B)	71	0	0	6			77	
8	Review documents/manuscripts (B)	8	0	0	0			8	
0	Requests for information about collections (C)	0	0	0	0			0	
4	Visiting researcher (C)	4	0	0	0			4	
7	Collections tours (D)	2	0	0	88			90	
1	Lab Tours (D)	6	0	0	0			6	
0	Receptions	0	0	0	0			0	
12	Responses to requests for information about specimens at VMNH (D)	6	0	0	6			12	
4	Lectures and presentations at VMNH (D)	2	0	0	153			155	
0	Technical consultations (B, D, & E)	0	0	0	0			0	
8	Display table with specimens	0	0	0	819			819	
2	Off-site education programs	0	11	4	0			15	
4	Lectures Not at VMNH (E)	39	0	0	13			52	
3	Off-site presentations (E)	0	22	8	15			45	
1	Field trips/Field Work	0	0	0	5			5	
62	TOTALS							1600	

TOTAL # INDIVIDUALS SERVED

1600

PEOPLE SERVED DATABASE printed 11/3/2022
Summary

# of Activities	TYPE OF ACTIVITY	PROFESSIONALS AND 13+ STUDENTS	K-12 STUDENTS	K-12 TEACHERS	PUBLIC			TOTAL #	
1	Conference presentations (A)	0	0	0	84			84	
14	Meetings chaired (B)	183	0	0	0			183	
9	Review documents/manuscripts (B)	29	0	0	0			29	
2	Requests for information about collections (C)	2	0	0	0			2	
3	Visiting researcher (C)	3	0	0	0			3	
1	Collections tours (D)	0	0	0	2			2	
0	Lab Tours (D)	0	0	0	0			0	
0	Receptions	0	0	0	0			0	
11	Responses to requests for information about specimens at VMNH (D)	10	0	0	1			11	
6	Lectures and presentations at VMNH (D)	12	0	0	70			82	
0	Technical consultations (B, D, & E)	0	0	0	0			0	
8	Display table with specimens	0	0	0	4604			4604	
0	Off-site education programs	0	0	0	0			0	
3	Lectures Not at VMNH (E)	9	14	2	105			130	
5	Off-site presentations (E)	0	0	0	25			25	
6	Field trips/Field Work	7	16	4	32			59	
69	TOTALS							5214	

TOTAL # INDIVIDUALS SERVED

5214

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PREFACE

As the governing authority for the Virginia Museum of Natural History (VMNH), the Board of Trustees is ultimately responsible for the protection and enhancement of the Museum's collections: (specimens, documents, and associated data). Specimens are: biological, geological, paleontological, or archeological objects, items, or materials; replicas, casts, models; items created and managed in digital form; and any other parts, or parts thereof, that fall within the disciplinary scope of the museum's collections.

The Collections Policies govern the development, safety, and management of ~~objects held by the Museum~~Museum's holdings, whether as part of the permanent collections or on temporary loan. The Research and Collections Committee of the Board of Trustees is responsible to the Board for the needs of the Museum's collections.

The VMNH Executive Director is responsible for carrying out the Collections Policies and to do so, may delegate authority to various members of the Museum's staff.

The Collections Committee is a standing committee of staff members appointed by the VMNH Executive Director for the purposes of (1) assisting in the development and revision of policies governing the Museum's collections and (2) serving as a review committee to recommend actions pertaining to collections acquisitions, management, use, and disposal. The Committee gathers and reviews information pertaining to the collections in light of existing research and collection development priorities, as well as available museum resources. The Committee recommends actions but does not have the final authority concerning these activities. The Committee will consist of the Collections Manager, three Research Curators, Registrar, and the ~~Director~~Manager of the VMNH's Department of Education and Public Programs (DEPP) ~~or their designee.~~ The Committee will meet on a quarterly basis.

The Collections Manager, all Research Curators, the Registrar, and ~~a designated representative of the Department of Education and Public Programs~~the Manager of DEPP are responsible for implementing procedures to ensure the development and care of the collections and their records in accordance with the Collections Policies. It is their responsibility to suggest revisions in the Collections Policies to the Collections Committee, the VMNH Executive Director ~~of, and the~~ Research and Collections, ~~the VMNH Executive Director and the Research and Collections~~ Committee of the Board of Trustees when the need arises. ~~Decisions made that have a direct impact on the collections held by the Department of Education and Public Programs will be made jointly by the Director of Research and Collections and the Director of the Department of Education and Public Programs.~~

Standard definitions for terms used in these policies are included in Appendix I.

I. Purpose and Ownership of Collections

The collections are developed to fulfill the mission and purposes of VMNH as established by the Board of Trustees and state legislation. The mission of VMNH is "to interpret Virginia's natural heritage within a global context, in ways that are relevant to all citizens of the Commonwealth" (July 1990). The legislated purposes for the museum are listed in Appendix II.

The collections are the property of the Commonwealth of Virginia, held in trust for the public. Collections obtained through funding or other means provided by the Virginia Museum of Natural History Foundation also become property of the Commonwealth.

II. Description of Collections

A. Scope - The disciplinary scope of research collections maintained by VMNH encompasses the fields of biology, geology, paleontology, and archaeology. Expansion of the disciplinary scope of the collections beyond the expertise of Research and Collections staff would require an explicit commitment by the Board of Trustees to provide adequate resources to care for and utilize the additional collections. Education collections represent all aspects of natural history that are appropriate to the educational mission of the Museum. All ~~collections~~ VMNH holdings will be under the direct supervision of either a ~~designated~~ Research Curator or the ~~Director~~ Manager of DEPP.

The geographic scope for collection development is prioritized as follows: specimens of Virginia origin, specimens from the Eastern United States and coastal waters, and specimens from other regions of the world that support research and educational projects relevant to the purposes of VMNH.

B. Development and Growth - The collections grow not only to fulfill immediate, specific needs of staff research scientists, but to obtain an adequate representation of Virginia's natural and cultural heritage for future research and educational needs. Thus, plans to guide the development of VMNH collections should address both issues.

It is the responsibility of each department that holds collections to develop taxonomic, geographic and programmatic priorities to guide the growth and development of VMNH collections. These priorities should be an integral component of departmental long range plans and developed on the basis of a department's research and teaching activities, programmatic goals, and the Museum's mission to preserve natural history collections. The priorities shall be reviewed annually by the curatorial staff and the Collections Committee ~~following a one-time initial approval by the Research and Collections Committee of the Board of Trustees.~~ Departmental priorities will be forwarded to the VMNH Executive Director and the Research and Collections Committee of the Board of Trustees for informational purposes. ~~Extreme departures from a department's previous priorities require the approval of the Research and Collections Committee of the Board of Trustees.~~

C. KindsCategories of Collections - Collections are maintained by the curatorial departments and ~~the Department of Education and Public Programs~~ DEPP for research as well as for education and exhibits. Specimens housed within these collections are defined by their relative significance for research and education and by the levels of supervision required for care and maintenance:

1) Strict Supervision - these include specimens of greatest value for research purposes. They demand the highest level of supervision for use, management and conservation practices and the greatest security. These are frequently referred to as the "permanent collection" of an institution and are appropriate for indefinite retention. Primary types and paratype specimens should be included in this designation.

2) Moderate Supervision - these include good quality specimens for use as reference material by the general public, for exhibit, for exchanges or for instructor use in educational programs. They demand

supervised handling and careful management practices, but the restrictions on use are not as strict as with the first category.

3) Low Supervision - these include specimens that require minimal or no supervision for handling. This category includes specimens that have been deemed of no value for research or exhibit purposes as well as "hands on" material that may be used for teaching or exhibition purposes. Given the potential for damage and loss of these specimens, these collections will not be accessioned by VMNH but will be inventoried for management purposes.

It is the responsibility of the Research Curator or ~~representative from~~ Manager of DEPP, in consultation with appropriate staff, to recommend the designation of departmental specimens to these categories. These designations can change over time and will guide decisions concerning how the specimens may be used. The coded designation will be entered into the main catalog as a separate field which can be edited if a specimen's status is changed.

III. Standards of Conduct

A. General - Through their personal and professional conduct, trustees, employees, non-paid associates, and volunteers are obligated to perform all collection-related activities for the benefit of the public and not just toward the advancement of personal interests. Collection activities should be conducted in such a manner as to prevent unnecessary damage to natural and cultural resources and to fulfill the mission of VMNH.

Trustees, employees, non-paid associates, and volunteers should not improperly use any ~~object~~specimen that is part of the Museum's collections. No employee or trustee may participate in any dealing (buying and selling for profit) in ~~object~~specimens similar or related to the ~~object~~specimens collected by the Museum.

The policies stated herein are in addition to the Museum's conflict of interest policy (Appendix III).

B. Professional Society Codes of Ethics - Trustees, employees, and non-paid associates will make every reasonable effort to adhere to the intent of guidelines and codes of ethics developed by professional societies for the collection, use, management, and conservation of specimens. A partial list of these guidelines is included in Appendix IV.

C. Personal Collecting - It is acknowledged that the acquisition, ownership, and management of a personal collection of specimens can enhance professional knowledge and judgment. However, personal collecting by Museum trustees, employees, non-paid associates, and volunteers at a minimum involves the appearance of a conflict of interest and sometimes an actual conflict of interest with the Museum. These policies apply to specimens added to a personal collection that fall within the disciplinary scope of the Museum's collections as described.

Museum trustees, employees, non-paid associates, and volunteers holding personal collections shall not compete with the Museum for specimens. They shall not use information that may be acquired only in the course of their duties and that is not generally known or available to the public, to acquire specimens for personal collections. They shall make every effort to become familiar with pertinent legal statutes and ethical guidelines developed by professional societies and apply these guidelines to their personal collections. They shall not deal (buy and sell for profit) in specimens that fall within the disciplinary scope of the Museum's collections.

A description of personally-owned collections shall be submitted using the Personal Collection Disclosure Statement (Appendix V) as a condition of assuming employment or an appointment and shall be filed every five years while employed by the Museum or completing an appointment. These statements, [when specimens are declared](#), shall be submitted to the VMNH Executive Director, Chairman of the Research and Collections Committee of the Board of Trustees, and Chairman of the Board of Trustees; the original copy will be maintained with Museum collections records by the Registrar.

It is incumbent upon trustees, employees, non-paid associates, and volunteers to notify the VMNH administration and Board of Trustees of any potential areas of conflict of interest [with regard to the personal collecting policy](#).

Any appearance of a conflict of interest [pertaining to personal collecting](#), should be brought to the attention of the Chairman of the Board, Chairman of the Research and Collections Committee of the Board of Trustees, or the VMNH Executive Director. These individuals have the responsibility to ask questions in the event that a potential conflict appears to exist and are obligated to request a more detailed study of the situation.

D. Appraisals - Appraisals of privately-owned [objectsspecimens](#) commit the museum's resources to private, not public benefit. Therefore, employees may prepare appraisals only for internal use and with the approval of the VMNH Executive Director, for other nonprofit institutions.

IV. Acquisitions

A. General Considerations — The quality of the VMNH collections must be improved constantly by responsible addition of new research specimens, so that the collections continue to grow, in quality and quantity, to support the goals of the Museum to maximum advantage.

Limitations in physical space and financial resources make it clear that the Museum cannot engage in indiscriminate acquisitions. Therefore, priorities for the acceptance of new acquisitions must be established, followed, and constantly monitored. One of the best methods of growth control is refusal of unsatisfactory material as determined by the criteria established in these policies.

Specimens are added to the collections in a variety of ways, including field work, salvaged materials, transfers from other institutions and state agencies, purchases, gifts, bequests, and exchanges. Regardless of the original intent of the acquisition, all specimens acquired by VMNH will be subject to the Collections Policies. Only materials that support the collection goals of the Museum and the individual

departments will be acquired. VMNH will not accept specimens offered with restrictions on use that might interfere with the mission and goals of the Museum. ~~Items~~ Specimens offered with restrictions will require special consideration and approval by the Board of Trustees. Specimens offered with declared value are first processed by the VMNH Foundation, an independent non-profit that does work on behalf of VMNH. The VMNH Foundation may then transfer the donated specimens to the Museum, to be processed adhering to these collections policies.

Occasionally, collections of importance or extraordinary significance unexpectedly become available; therefore, the acquisition of specimens sometimes must be opportunistic. Acceptance of responsibility for such collections may involve establishing a new interest area for the Museum. Acquisition of such collections must be judged individually, carefully weighing the values and costs of such acquisitions against the goals, ongoing programs, and strengths of the Museum.

The following criteria shall be considered during the evaluation of a specimen or group of specimens as potential acquisitions:

- 1. Collection Priorities** - Is the specimen or collection consistent with the collection priorities of the Museum and the department as described in the Collections Policies?
- 2. Uniqueness** - Is the specimen or collection so unusual that it presents an exceptional opportunity for the Museum and thus should be given preferential consideration?
- 3. Legality** - Does the transferor have the full and clear legal title or the right to convey full and clear legal title to the specimens and all associated materials offered? Was the collection obtained and imported legally? Is documentation to that effect satisfactory?
- 4. Ethical Considerations** - Was the specimen or collection obtained ethically? Was adequate consideration given to the rights and beliefs of the culture of the originating locality? Were private landowners and responsible governmental entities adequately consulted and fully informed of collecting activities?
- 5. Documentation** - Is there adequate scientific documentation accompanying the specimen or collection? If not, is there some extraordinary reason, such as excellent example for exhibit item, few in existence, etc., to justify adding it to the collections? Is the provenance of the specimen(s) adequately documented?
- 6. Physical Integrity** - Will the current physical condition of the specimen(s) permit immediate use as intended? If not, to what extent will additional preparation or conservation be required? Are sufficient physical, personnel, and monetary resources available to care for the specimen(s) once accepted by VMNH?
- 7. Resource Impact** - What will the impact be of the acceptance of this specimen or collection on future expenses of the Museum, (e.g., personnel, processing and maintenance costs, space needs, collection storage equipment, and conservation needs?) It is the responsibility of those recommending acquisitions to provide accurate estimates of this and to consult with and include

the opinions of all affected departments in the museum. These estimates should include costs of any outside help needed to advise VMNH on the cost of acquiring and maintaining the collection.

8. Cost - If the specimen or collection is offered for sale to the Museum, could comparable specimen(s) be obtained by gift or bequest?

9. Encumbrances - Is the specimen or collection encumbered with unusual conditions set by the donor? Is it offered as a "permanent loan" or long-term loan? Is its use restricted or encumbered by intellectual property (e.g., copyright, patent, trademark, trade name)? Is its use restricted or encumbered by its nature (e.g., representative of an extinct or endangered species, physically hazardous, defamatory, obscene)?

10. Commercialism - Will acceptance appear to or give rise to commercial exploitation (e.g., purchase of skeletal materials from a dealer)?

B. Legality - The Museum will not knowingly accept or acquire specimens that have been illegally collected or imported into the United States. Every reasonable effort will be made to ensure that ~~items~~[specimens](#) considered for acquisition have been collected and imported in full compliance with state, federal, ~~(including the Native American Graves Protection and Repatriation Act)~~, foreign, and international statutes. It is the responsibility of Museum staff to inform themselves of and comply with pertinent laws. If Museum staff needs assistance determining the legality of a specimen or collection, a request for information or support can be directed through the Registrar who will forward it as needed to the VMNH Executive Director. If necessary, Museum legal counsel may be consulted on this issue.

C. Protection of Natural and Cultural Resources - The Museum must strive to preserve and guard the natural and cultural heritage of the world. Therefore, VMNH will refuse specimens if it has reason to believe that their collection caused or contributed to the recent destruction of a population of a species, a community of organisms, habitats, sites, or monuments. The Museum may also refuse to accept ~~items~~[specimens](#) collected in such a way as to impair their scientific value, ~~(e.g., archaeological and geological~~ [objects](#)~~specimens~~ taken without proper recording of stratigraphic and site data or biological specimens with inadequate documentation, unless the [objects](#)~~specimens~~ are clearly specified for use in which these data are not needed~~).~~ It is the responsibility of the staff person to whom a specimen has been offered to make a reasonable effort to ascertain from the circumstances surrounding the transaction or knowledge of the specimen's provenance that the original collecting was performed appropriately.

D. Intended Use and Documentation - It is the responsibility of the Research Curator or ~~Director~~[Manager](#) of DEPP to identify the intended use(s) of the specimens offered. The Research Curator or ~~Director~~[Manager](#) of DEPP is responsible for determining whether the quantity and quality of data and provenance for such specimens are sufficient for their intended use.

E. Physical Integrity - The Museum will not accept specimens for which it cannot provide adequate storage and care. Information concerning additional preparation or conservation treatment needed to permit use of the specimen as intended as well as thoughtful estimates of financial and staff resources required must be presented during the acquisition approval process.

F. Conditions of Acceptance - The Museum will not guarantee to a donor that specimens will be retained permanently by the Museum, that they will be exhibited permanently, or that they will be kept together in storage as a single group. However, it is recognized that situations arise where conditions that would not interfere with the mission and goals of the Museum are placed on specimens by the transferors. Examples of such a situation might be specimens received from Federal museums or agencies that are not allowed by law to transfer the title of such specimens.

Specimens offered with contingencies must be approved according to standard procedures (Section H). In addition, a written agreement should be prepared describing the restrictions placed on the transfer of specimens as well as the responsibilities of both the transferor and Museum. The agreement should be signed by both the VMNH Executive Director and the transferor. For acquisitions with an aggregate value of \$510,000 or more, the agreement shall be reviewed by legal counsel prior to submission to the Board of Trustees or any committee thereof and approved by the Research and Collections Committee of the Board of Trustees.

G. Appraisals for Acquisitions - It is the responsibility of the donor to have material appraised by a recognized independent appraiser. The Museum should recommend to the donor to consult appropriate Internal Revenue Service regulations and seek professional tax or legal counsel. The Museum will maintain appropriate records as required by IRS.

H. Acquisition Plans - All departments acquiring specimens should develop taxonomic and geographic and programmatic priorities to guide the development of collections within that department, taking into consideration departmental projects (as described in previously approved Employee Work Plans) and efforts to develop the collection as a state repository. Each Research Curator/~~Director~~Manager of DEPP is also responsible for annually developing an acquisitions plan based on these priorities. The acquisitions plan should briefly summarize for each collecting effort the anticipated sites or sources of ~~objects~~specimens involved, resources needed to prepare, register, and store the material, expected quantity of material, and individuals regularly associated with the effort. At the last meeting of each calendar year, the Collections Committee will review all acquisitions plans for the upcoming year, using each department's taxonomic, geographic and programmatic collection priorities to guide the review process.

During the year, the Research Curator/~~Director~~Manager of DEPP will provide descriptions of the material actually brought to the Museum as a result of these collecting efforts. Extreme departures from the approved acquisitions plan will be considered individually as potential acquisitions. Opportunistic field collecting will be treated as all other potential acquisitions.

I. Approval of Acquisitions - The acquisition process should support the practice of selective acquisitions to further the mission and goals of the Museum.

1. Initial Submission of Specimens for Review - Any trustee, employee, non-paid associate, or volunteer may recommend ~~items~~specimens as potential acquisitions. All ~~items~~specimens initially must be reviewed by the Research Curator that would ultimately be responsible for the specimens. It is the responsibility of the Research Curator or ~~Director~~Manager of DEPP to obtain and prepare the documentation (e.g., Record of Incoming Material form, Site Visit form) necessary to permit a thorough review of the ~~items~~specimens based on the criteria established in

section A. The Record of Incoming Material form and Site Visit form are included in Appendices VI and VII, respectively.

2. Recommendation by Research Curator or ~~Director~~ Manager of DEPP- The Research Curator or ~~Director~~ Manager of DEPP submits the potential acquisition and associated documentation to the Collections Committee along with a recommendation to accept or refuse the material.

3. Collections Committee Review - Potential acquisitions will be circulated among the Collections Committee for review on at least a quarterly basis, with additional meetings called as needed. Each committee member will review and vote on each potential acquisition in light of the previously approved acquisition plan for that department. Based on a majority vote of the Committee, the Committee will recommend a course of action for the potential acquisition: acceptance, refusal, or postponement to obtain additional information. Votes may be made verbally, in writing, by electronic mail, or by proxy. Reasons for refusal will be documented. If the Committee recommends refusal of the materials, the Research Curator or ~~Director~~ Manager of DEPP will be requested to provide additional information and justification for acquiring the ~~objects~~ specimens if he/she so desires. If after further discussion and consideration, the Collections Committee still recommends refusal of the material, a thorough presentation of all information concerning the potential acquisition will be presented to the ~~VMNH Deputy Director of Research and Collections~~ by the Collections Committee and relevant Research Curator/~~Director~~ Manager of DEPP proposing the acquisition.

4. Approval of Collections Committee Recommendations - All recommendations by the Collections Committee must be considered by the ~~Director of Research and Collections, followed by the VMNH Executive Director. This process is as follows: After a vote of the Collections Committee, a recommendation will be made to the Director of Research and Collections. If The Director of Research and Collections concurs with the Collections Committee's recommendation, then the potential acquisition is forwarded to the Executive Director for his consideration. If a recommendation is not approved by the Director of Research and Collections, consideration of the potential acquisition returns to the Collections Committee for further study. If after further discussion and consideration, the Collections Committee and Director of Research of Collections continue to disagree on a recommendation, the potential acquisition should be reviewed by the Executive Director with a thorough presentation of the disparate opinions. If there are disparate opinions among the Collections Committee, the Director of Research and Collections, and the Executive Director, then the potential~~ VMNH Executive Director. If the Collections Committee and the Executive Director disagree about a potential acquisition, information pertaining to that acquisition should be forwarded to the Research and Collections Committee of the Board of Trustees with a thorough presentation of the disparate opinions.

5. Approval Authority ~~—Together, the Collections Committee, the Director of Research and Collections,~~ Specimens offered with a declared value are first processed by the VMNH Foundation, an independent non-profit that does work on behalf of VMNH. The VMNH Foundation may then transfer the donated specimens to the VMNH, to be processed using the guidelines in these collections policies. Together, the Collections Committee and the VMNH Executive Director, through this review process, have the authority to approve all potential acquisitions with an aggregate value of less than

~~\$5~~ \$10,000. A description of these acquisitions will be presented to the Research and Collections Committee of the Board of Trustees for informational purposes. The Research and Collections Committee of the Board of Trustees will review all potential acquisitions on behalf of the Board of Trustees. For acquisitions with an aggregate value of \$510,000 or more, all information should be reviewed by legal counsel and approved by the Research and Collections Committee of the Board of Trustees.

6. Denials and Reversals of Approval - The Research and Collections Committee of the Board of Trustees will review and document reasons for denials as well as for any reversals of decisions recommended by the Collections Committee or the ~~Director of Research and Collections or the~~ VMNH Executive Director. Decisions by the Research and Collections Committee of the Board of Trustees to reverse recommendations should be reviewed by the entire Board of Trustees before becoming final. In such cases, a review panel comprised of ~~3~~three members chosen from the Board of Trustees would be formed to study the potential acquisition in question and report to the Board of Trustees. One member would be chosen by the Collections Committee, one member appointed by the Research and Collections Committee of the Board of Trustees and a third member, who will serve as Chairperson, selected by the other two panel members.

7. Acquisitions for Research - The majority of VMNH specimens are acquired for research purposes. Therefore, these specimens require the greatest commitment of VMNH research and collections resources (*e.g.*, personnel, space, storage equipment, preparation equipment, etc.). The Board of Trustees recognizes its responsibility to provide resources to safeguard these valuable collections. In order to plan for and provide sufficient collections resources, it is critical that the Museum use the acquisition process to prevent indiscriminate acquisitions, regardless of their source.

8. Acquisitions for Exhibit Purposes or Public Programs - When planning an exhibit or program, it may happen that a specimen must be acquired from an outside source. If a specimen is acquired through purchase or donation for use in an exhibit or public program, this specimen will be reviewed by the appropriate scientific authority to determine whether ~~it is possible type material or unique in terms of not its~~ scientific value. ~~should preclude its use in an exhibit or public program.~~ This review must occur no more than six (6) ~~week~~weeks after the specimen has been made available to the appropriate Research Curator.

If the specimen is determined to be ~~possible type material or unique in of sufficient~~ scientific value, ~~so~~ that the appropriate Research Curator deems it necessary to accession it as a research specimen, they must (1) promptly notify the staff person who acquired the specimen and (2) provide a written justification for accessioning the specimen as a research specimen. This justification will be presented to the ~~Director~~Manager of the responsible department, the Collections Committee, ~~the Director of Research and Collections~~, and the Executive Director. A decision to accession or not will be considered at the next Collections Committee meeting, or in a special session of the Committee, depending on time constraints. The decision process will be expedited to ensure that the exhibit or program planning process proceeds without undue delay. The Research Curator will make a good faith effort either to provide a suitable replacement from the VMNH collections, from another source or allow limited use of the specimen for the original purpose, in a way that minimizes disruption of the planned activity while insuring the integrity of the specimen. Appeals to accession decisions may be presented to the Collections Committee by the ~~Director~~Manager of the responsible department. If disagreement continues, appeals can be presented to ~~the Director of Research and Collections, followed by~~ the VMNH Executive Director.

Specimens reviewed in this process but not accessioned into research departments will be provided with a moderate or low level of supervision as determined by the [Director/Manager](#) of the responsible department (described in section II, C). These [items/specimens](#), initially not deemed rare, may not be accessioned in the future without consulting the [Director/Manager](#) of the responsible department. As new information regarding the rarity of a particular [object/specimen](#) comes to the attention of a Research Curator, they must notify the [Director/Manager](#) of the responsible department. At that time, the curator will provide a written justification for reconsidering the accessioning of the [object/specimen](#) as a research specimen. This justification will be presented to the [Director/Manager](#) of the responsible department, the Collections Committee, ~~the Director of Research and Collections~~, and the Executive Director. A change in status from non-accessioned [object/specimen](#) to accessioned research specimen will be considered at the next Collections Committee meeting. If the specimen is accessioned, the curator is obligated to make a good faith effort to provide funds to purchase a replacement, to provide a suitable replacement from the VMNH collections, or another source, or to allow continued use of the specimen in a way that minimizes disruption of any planned exhibit or program while [insuring/ensuring](#) the integrity of the specimen.

When such specimens are no longer needed for exhibit or programming purposes, it is at the discretion of the [Director/Manager](#) of the responsible department to either retain the specimens for potential future use or offer the specimens to Research and Collections for accession consideration or for use in educational presentations managed by that department.

J. Accessioning - The formal process used to accept and record [an item/a specimen](#) as a permanent collections specimen. It is a process by which only appropriate material is added to the Museum's permanent collections. Accessioning includes two basic activities: an approval process and a registration process. [The registration process occurs only after the review process is complete.](#) The policies governing these activities are discussed in the previous sections.

K. Commencement of Ownership - The time at which VMNH is considered to take possession of and legally own a specimen varies with the method of acquisition. The following definitions set forth the time and conditions for commencement of ownership:

1. Gifts/Bequests: VMNH is considered to own a specimen when (1) an offer of donation is made, (2) the Museum maintains physical custody, and (3) appropriate documentation has been completed (e.g., Deed of Gift, as shown in Appendix VIII). Ownership begins only after these three conditions have been met.

2. Purchases: Ownership begins when VMNH has paid for the specimen, subject to any conditions of delivery.

3. Exchange/Transfer: Ownership begins when the specimens physically enter the Museum and all exchange/transfer forms have been completed by both the transferor and VMNH.

4. Field Collection: Everything collected on Museum-sponsored trips by employees, trustees, non-paid associates, and volunteers automatically and immediately belongs to the Museum as soon as it is collected unless limited by permit or legislative restrictions. Following the conclusion of the trip, the appropriate Museum department will make recommendations for

accessioning part or all of the materials collected, according to the acquisitions approval process outlined in this policy.

The Museum has the right of first refusal for all materials collected by participants of Museum classes or programs. For jointly-funded projects, a written agreement should be developed at the beginning of the project, before field work begins, describing the disposition of specimens collected as part of the project. The agreement should be approved by the VMNH Executive Director and the appropriate representatives of the other funding agencies.

Employees who hold joint appointments, whether temporary or long-term, with other agencies should recognize the potential conflict of interest relative to collecting activities. Every effort should be made by employees to obtain representative material for the Museum from any project in which they participate. For long-term joint appointments, a written agreement should be developed clarifying the disposition of specimens collected during the course of the appointment. The agreement shall be approved by the VMNH Executive Director and the appropriate representative of the other agency.

V. Collection Management

A. General Considerations - The ultimate goal of collection management is to maximize the values of and extend the lives of specimens in the VMNH collections in order that they may be used to increase knowledge of our natural heritage. To accomplish this goal it is necessary to:

1. manage the specimens individually as well as collectively relative to Museum resources (e.g., space, personnel, equipment, etc.);
2. maintain documentation procedures that fulfill legal requirements, preserve each specimen's collection data, and that build a record of the specimen's use and history;
3. ensure that sound conservation principles are followed to slow biological, chemical, and mechanical deterioration; and
4. ensure the safety of the collections against hazards.

VMNH will make every effort to adhere to professional standards and ethics for collections management. The Board of Trustees is ultimately responsible for the protection and appropriate use of the collections. Although it is the primary function of Research and Collections staff to coordinate the collections care program for the Museum, the entire Museum staff shares the responsibility for the care and management of the specimens. Not only is the safety of the specimens to be considered, but human health and safety issues resulting from contact with or interaction with specimens must be addressed as well.

B. Procedures and Guidelines - The Collections Manager, the Registrar, and the appropriate Research Curator or ~~Director~~ Manager of DEPP are responsible for establishing written procedures or guidelines for the management, documentation, and conservation of the museum's collections, subject to the general

guidelines of this policy. Procedural documents are reviewed by the Collections Committee which may suggest revisions.

This policy and all procedures and guidelines are provided as a manual for reference. Changes must be submitted to the Collections Committee in writing for inclusion in the manual.

C. Management - The Collections Manager is responsible for coordinating the development of short and long range plans to improve the quality of management, documentation, and care of the museum's collections. To facilitate this process, the Collections Manager, in coordination with Research Curators/~~Director~~Manager of DEPP, and in consultation with conservators and collections assistants, will coordinate the departmental collection philosophies/priorities statements, department acquisition plans, collections assessment, and Museum-wide conservation assessment at appropriate time intervals. A long-range collections plan will be prepared every five to seven years, with annual revisions as needed, using these and other reports.

A committee comprised of the Collections Manager ~~or designated representative~~, representatives of departments holding collections, and representatives of the Building and Grounds Department will establish and revise procedures to mitigate damage to collections and staff members in the event of natural disasters, fire, building damage, and other such situations. These procedures are to include guidelines for evacuation, recommendations for staff training to deal with emergencies, and procedures for documenting damage.

D. Documentation - Accessioning, cataloging and inventorying procedures, and data standards are established by the Collections Manager, Registrar, and Research Curators. Specimens which have become the property of VMNH must be permanently identified in some manner that will not impair the research or exhibition value of the specimen.

All procedures used on a specimen and transactions involving specimens should be documented as part of the permanent history of the specimen. The Research Curators/~~Director~~Manager of DEPP, in coordination with the Collections Manager and Registrar, are responsible for establishing and maintaining documentation protocol for specimen preparation, storage, use, and treatment. The resulting documentation should be made available to anyone who works with the specimens and is provided if the specimen is transferred to a different collection or institution.

Archival copies of all registration and transaction records must be maintained in the Registrar's files. These include records of title, transfer, gift or bequest, receipts, permits, catalogs, inventories, records of conservation treatment, research use or destructive testing of specimens, loans, and deaccession documentation. It is the responsibility of the Collections Manager, Registrar and Research Curators/~~Director~~Manager of DEPP to insure that these records are maintained.

VMNH is responsible for developing and following archiving procedures in conjunction with and subject to the policies of the Virginia State Library and Archives. All archived records are accessible under the provisions of the Virginia Freedom of Information Act unless reason for restricted access can be shown. Access may be restricted in cases where disclosure of information might jeopardize the continued existence or integrity of natural or cultural resources. Excerpts from the Virginia Freedom of Information Act are included in Appendix IX.

Documentation in the form of field notes, maps, negatives, photographs, slides, films, videos, sound recordings, software or other computer media, published works, illustrations or printouts must not be stored in specimen cases with specimens. Storing documentation in specimen cases can introduce contaminating materials, potentially compromising the safety of the specimens. Full archival copies of all such documentation must be maintained by the Research Curator/~~Director~~Manager of DEPP or Registrar in an appropriate storage cabinet (i.e., fire-proof safe, chemical safe, etc.).

Field notes and associated documentation are the property of VMNH if they are produced by VMNH staff members, researchers, or volunteers receiving support from VMNH. A full set of such documentation must be provided to the Registrar for archiving purposes. It is preferred that original sets are archived and that duplicates be used for research activities.

E. Conservation of Specimens - The Collections Manager and/or Registrar, in consultation with conservators and Research Curators, will coordinate the development of guidelines for preservation and conservation procedures and standards. VMNH will make every effort to implement and document preventive conservation techniques to help slow specimen deterioration. Conservation treatment will be carried out as needed in consultation with professional conservators.

F. Incoming Loans - VMNH requests loans for the purpose of research, education, and exhibition. A request to borrow specimens is made in writing by a Research Curator/~~Director~~Manager of DEPP. Loans to students or non-paid associates are made through the appropriate Research Curator/~~Director~~Manager of DEPP. Documentation pertaining to loans must be made available in advance of the receipt or outgoing shipment of the objects/specimens to the Registrar. A copy of the Incoming Loan Agreement form is included in Appendix X.

All conditions set on an incoming loan must be reviewed by the Research Curator/~~Director~~Manager of DEPP and the Registrar. In case of disagreement, the decision to accept a loan can be appealed to the ~~Director of Research and Collections, followed by the~~ VMNH Executive Director. All conditions set on the use, storage or exhibition of specimens by the lending institution must be achievable. Once accepted, these restrictions are binding, and VMNH will make every effort to adhere to these restrictions. No portion of incoming loans may be transferred to a location or person that has not been previously approved in writing by the lending institution.

VMNH may not borrow specimens which/that are known to have been collected or imported in violation of state, federal, foreign or international restrictions or which/that may otherwise place the Museum in a compromising legal or ethical position. If such information becomes known after the loan has been received, the problem should be referred to the ~~Director of Research and Collections for resolution. Information regarding this resolution will be forwarded to the VMNH Executive Director.~~ Executive Director for resolution. In connection with any such loan, VMNH shall not incur any unlawful debt on behalf of the Commonwealth.

Specimens which/that are damaged or lost while in the care of VMNH must be immediately documented in writing and the lending institution notified. Questions about insurance or other costs relating to damage or losses must be referred to the ~~Director of Research and Collections or to the~~ Registrar. Information regarding the damage or loss of specimens while they are in the care of VMNH will be forwarded to the VMNH Executive Director.

Shipping and insurance arrangements on incoming loans must be agreed to by both parties in writing in advance.

VI. Use of Collections

A. General - VMNH provides access to its collections and associated data primarily by responding to written or verbal research inquiries or general questions; by lending specimens to institutions for research, educational or exhibit purposes; and by physical access to collections areas and specimens. In addition, VMNH provides access to selected information about collections through the internet. Although the purpose for collecting most natural history specimens is to use the specimens, it is necessary to balance the goal of use with that of specimen preservation. As a result, unconditional access to and use of specimens is not feasible. The policies in this section set forth guidelines for access to and use of specimens in VMNH collections.

B. Access — Maintenance and security of collections and data requires that access be restricted to authorized VMNH staff members, volunteers, and visitors only. Authorized staff members and volunteers, including non-paid associates, are those who need access to collections areas to carry out their duties and responsibilities. Visitors wishing to use the collections must request an appointment in advance of the time of visit and must be approved by the appropriate Research Curator/~~Director~~/Manager of DEPP. Access to a collection will be decided using the following criteria:

1. The individual must have a legitimate reason for using the collection (*e.g.*, artistic reference, scholarly research, etc.);
2. The individual should demonstrate knowledge of or be instructed in appropriate techniques for handling specimens;
3. The individual must demonstrate willingness to comply with the general security precautions for the collections and the museum's collections procedures; and
4. The individual must provide the necessary equipment to complete his/her project and expect to work during the museum's regular operating hours.

Exceptions to these criteria must be resolved in advance of the visit and be approved by the appropriate Research Curator/~~Director~~/Manager of DEPP in consultation with the Collections Manager. Individuals denied access to the collections may request a review of the decision by the Collections Committee. Denial of access by the Collections Committee can be appealed to the ~~Director of Research and Collections, followed by the~~ VMNH Executive Director. Visitors requesting use of VMNH equipment or preparation/laboratory space must receive approval from the appropriate Research Curator(s) and should be supervised during their visit.

Visitors who have previously abused their status or caused damage to specimens may be denied access to all collections.

Collections storage units and areas, offices, and records will be locked or protected from unauthorized access when no staff members are present.

Collections archives (maintained by the Registrar), current records, and collections policies and procedures are open to public access under the provisions of the Virginia Freedom of Information Act (Va. Code Ann. Section 2.2-3700 et. seq.), with the following restriction: as is permitted under Va. Code Ann. Section 2.2-3705.7(10), access is restricted for records containing information on the site-specific location of rare, threatened, endangered or otherwise imperiled plant and animal species, natural communities, caves, and significant historic, and archaeological sites. The ~~Museum also restricts access to information on the location of significant historic and archaeological sites.~~ The disclosure of such information would jeopardize the continued existence or integrity of the resource. This restriction shall not apply to requests from the owner of the land upon which the resource is located.

C. External and Internal Loans - Loans are temporary physical transfers of specimens without any transfer of ownership. Requests to borrow VMNH specimens should be made in writing to the appropriate Research Curator/~~Director~~ Manager of DEPP including the following information: purpose of the loan, description of the material requested in as much detail as possible, quantity of specimens needed, and where and under whose responsibility the specimens will be housed while on loan. External loans are made only to institutions, not individuals; however, a permanently employed representative of the institution will be named as the responsible party for the loan. Internal loans are made only to a department, not an individual; however, the Research Curator/Department Head ~~Manager~~ requesting the loan will be named as the responsible party for that loan. Copies of Outgoing and Internal Loan Agreement forms are included in Appendices XI and XII, respectively.

Requests will be reviewed by staff of the appropriate department relative to the quantity of available material and restrictions placed on certain specimens. The Research Curator/~~Director~~ Manager of DEPP has the authority to approve loans of specimens (requests for destructive testing and reproduction are handled differently; see ~~sections~~ sections D) and E, respectively). In addition, the Research Curator/~~Director~~ Manager of DEPP may designate other staff to approve loans as appropriate. Biological specimens representing extinct or endangered species, type specimens, voucher collections, specimens described or figured in publications, fragile specimens or single representatives of a taxon are generally not available for loans. Exceptions to this must be approved ~~in writing~~ by the appropriate Research Curator.

All specimens loaned (externally and internally) from VMNH are subject to the following guidelines. All exceptions must be requested and granted in writing. Failure to follow the Museum's guidelines may jeopardize future borrowing privileges. In the event that a problem arises with a loan, copies of all correspondence, preparatory materials, condition reports, and documentation concerning specimens will be forwarded to the Registrar and to the Research Curator/~~Director~~ Manager of DEPP. The Research Curator/~~Director~~ Manager of DEPP will contact appropriate parties. In the event that the Research Curator/~~Director~~ Manager of DEPP does not follow-up, the Registrar may appeal to the Executive Director of Research and Collections to act independently.

1. All documentation must go through the office of the Registrar prior to loan initiation.
2. The length for each loan will be negotiated at the time of the loan, generally not to exceed ~~six~~ 12 months. Requests for extensions should be made in writing to the Registrar, with copies to

the appropriate Research Curator/~~Director~~Manager of DEPP. The decision to approve a loan extension will be made by the Research Curator/~~Director~~Manager of DEPP. The Registrar will monitor the length and return of loaned material.

3. Specimens may not be forwarded to another institution, department or individual without written permission from VMNH.
4. Specimens should be stored according to professional standards in cases and/or facilities that are free from hazards (e.g., insects, rodents, fire, vandalism, theft, water damage, etc.). VMNH will recommend storage and handling guidelines for unusual or sensitive materials.
5. Specimens should not be repaired, sampled, dissected, remounted or in any way altered without written permission. Special permission is required for destructive testing or invasive sampling of any kind.
6. All original documentation accompanying the specimens must never be discarded or covered over (examples include original locality labels, previous identification labels, etc.).
7. Type specimens are loaned only from certain divisions and are subject to restrictions. All types must be returned within 90 days of receipt by registered priority mail, unless otherwise negotiated.
8. All material sent out on loan must be returned by the specified due date even if incorrectly identified. Taxonomic changes must be noted when the material is returned.
9. The specimens are the responsibility of the borrower until received by VMNH. Therefore, they should be packed and shipped according to national and international laws governing transportation and in a manner similar to or better than as received. Wooden shipping containers must be returned to VMNH.
10. The borrower must agree in advance to cover the cost of return shipping and insurance and to provide condition reports upon receipt and upon return. Specimens must be insured for the value indicated on the original shipping invoice.
11. VMNH must receive credit in any publications based on the use of specimens from its collections. The ~~acronym-abbreviation~~ "VMNH" should be used ~~for citing when identifying~~ the Museum's specimens.
12. Authors shall send ~~two reprints~~electronic or physical copies of ~~any publication~~all publications based in whole or in part upon material loaned from the Museum. One copy will reside in the ~~Museum's library~~Registrar's files, the other in the department from which the specimens were borrowed.
13. VMNH shall ensure that the borrower agrees in writing to be liable for any damage to specimens during the loan period

D. Destructive or Consumptive Sampling - To fully realize the research potential of the collections, it may be necessary to remove samples or alter permanently the appearance or substance of some specimens. It must be recognized, however, that such sampling and alterations potentially decrease the future scientific value of the individual specimen. To balance the legitimate needs of the scientific and scholarly community with the long-term preservation of the collections for future needs, each request for sampling will be considered according to the following parameters.

1. A written request to sample a specimen or to perform any type of destructive analysis should be sent to the appropriate curator and include the following information:

a. a description of the project stating the purpose of the research;

b. a description of the techniques to be used and an indication of why these are appropriate to the question being asked;

c. a description of the specimen(s) needed;

d. a justification for the use of VMNH specimens; and

e. the name, address and telephone number of the individual(s) responsible for the project and for performing the techniques. If the individual(s) responsible for the project and for performing the techniques is a student, then the name, address, and telephone number of the individual(s)'s advisor should be included. If a fax number and email address are available, these should also be included.

2. Requests shall be evaluated and recommended by the appropriate Research Curator/~~Director~~Manager of DEPP and the ~~Executive~~ Director ~~of Research and Collections~~. If either of these individuals so requests, additional evaluations of the researcher's request may be sought. If the specimens requested by a researcher are to be totally consumed, then the researcher's request shall be treated as a request to deaccession specimens (section VII of these policies). All decisions must be approved by the Collections Committee and will be documented in writing and the researcher notified accordingly.

If a request is refused, a researcher may submit an appeal to the Collections Committee. The request shall be reviewed by an outside review panel consisting of at least three professionals in appropriate fields who are not directly affiliated with the Museum. At least one of these three must be a collections care specialist or conservator. The researcher, Research Curator/~~Director~~Manager of DEPP, and the ~~Executive~~ Director ~~of Research and Collections~~ will each choose one individual to serve on the review panel. The Collections Committee will determine suitable action on the basis of the results of the panel's recommendation.

3. Criteria and considerations for approval include:

a. The research project has merit;

- b. The researcher(s) demonstrate competence with proposed methods and have sufficient institutional resources to carry out stated research;
- c. The technique to be applied should yield the intended results and are the least intrusive analytical means of obtaining those results;
- d. The amount of sample and number of specimens requested is necessary and sufficient to obtain accurate results;
- e. The data required are not available from other sources;
- f. The potential for compromising the future utility of specimens for other investigations is minimal; and
- g. The researcher(s) indicate a willingness to abide by VMNH operational guidelines for sampling and/or destructive analysis.

4. General operational guidelines for sampling and destructive analysis:

- a. Holotype specimens will not be tested in any way that lessens the specimen's value as a holotype. Requests to test holotype specimens automatically require an evaluation of an outside review panel.
- b. Usable samples and unused portions of specimens will be returned to VMNH so they can be retained for future use.
- c. All resulting analytical data, including raw data in the form of graphs, computer printouts, etc., pertaining to the listed specimens will be provided to the Research Curator/~~Director~~Manager of DEPP and the Registrar to become part of the specimen's permanent record. Such data, except published reports, shall remain confidential for a period of two years following the close of the original loan due date. During this period, the name of the researcher may be given to others proposing to use VMNH specimens for similar research projects. In this case, the second researcher may be requested to obtain analytical results from the first researcher before the additional sampling requests may be approved.
- d. Methods and the extent of sampling are thoroughly documented for each specimen according to departmental guidelines.
- e. A Destructive Testing Analysis form (Appendix XIII) shall be signed by the researcher(s) before specimens are sent.
- f. All costs of the analysis, including packing and shipping from and back to the Museum, are the responsibility of the researcher, unless otherwise indicated in writing.

g. Two copies of any publication including information resulting from the analysis on the specimens will be provided to the Research Curator/~~Director~~Manager of DEPP and the Registrar.

h. Supplemental guidelines shall be established by the Research Curator/~~Director~~Manager of DEPP and the Collections Manager in accordance with these policies to detail requirements that are specific to individual disciplines.

5. Failure to follow VMNH guidelines may jeopardize future borrowing privileges.

E. ~~Reproductions~~Reproduction - Reproduction of museum specimens shall not compromise the Museum's image nor its ethical responsibility to preserve scientific specimens and hold these specimens in trust for the public. Reproductions include casts, models, illustrations, 3D scanning, imaging, and manufactured facsimiles. The Museum retains the right to commercialization of all VMNH specimens and reproductions and may refuse reproductions by others on this basis. Reproductions may be approved for research, manufacture, and sale under the following restrictions:

1. Research ~~Curators/Director~~Curator/Manager of DEPP may restrict the reproduction of any specimen in their collection on the grounds of irreplaceability, fragility, controversial nature, or ongoing research that could be compromised. Reasons for restrictions will be documented. Restricted material may include specimens that fall under the provisions of the American Indian Religious Freedom Act or the Endangered Species Act.

2. Copyrights are retained by VMNH and a notice of copyright appears on or with all reproductions.

~~3. Permission to reproduce VMNH specimens or other collections materials, including photographs and slides owned by VMNH, must be obtained in writing to insure that policy restrictions are considered for each situation and prevent the misuse of VMNH specimens, staff time, facilities and equipment.~~

~~Requests to reproduce specimens for the purpose of research, educational programs or exhibits by VMNH staff must state the procedures and materials that will be used. Requests must have the signed approval of the relevant Research Curator/Director of DEPP.~~

~~Requests to reproduce specimens for the purpose of research, educational programs or exhibits by non-VMNH staff must include a statement of (a) the purpose of the intended use, (b) the reproduction procedure and materials that will be used, (c) who will do the reproduction, (d) where it will be done and (e) if VMNH staff and materials are to be used, how the materials and personnel time will be accounted for. Requests must have the signed approval of the relevant Research Curator/Director of DEPP and Collections Manager.~~

~~Requests to reproduce specimens for artistic reference or commercial purposes must include a statement of (a) the purpose of the intended use, (b) the reproduction procedure and materials that will be used, (c) who will do the reproduction, (d) where it will be done and (e) how proceeds from a sale are to be distributed. Requests must have the signed approval of the Research~~

~~Curator/Director of DEPP, Director of Research and Collections and the VMNH Executive Director and are subject to restrictions stated in these policies.~~

~~4.~~ The VMNH store is the first avenue of sale and VMNH should receive a given share of all receipts, as specified under contractual agreement, (such as a Memorandum of Understanding), which will be drafted as needed.

~~5~~4. The right to grant a license to reproduce VMNH specimens for artistic reference or commercial purposes is retained by VMNH. Licensees may not use VMNH personnel time, buildings, or resources to make reproductions, unless otherwise agreed upon in writing, and must abide by all conditions set on specimen care and protection. A license to reproduce VMNH specimens is revocable.

~~6~~5. If negatives or molds are produced, VMNH may ask that all digital files~~negatives, molds, and first-generation casts~~ be given to VMNH or destroyed once the original conditions of a license are fulfilled.

~~7~~6. VMNH may ask that all digital files be given to VMNH or destroyed once the original conditions of a license are fulfilled.

~~8~~7. Copies of all documentation (paper and electronic versions) must be provided to the Registrar to become part of the specimen's permanent record.

8. Permission to reproduce VMNH specimens or other collections materials, including photographs and slides owned by VMNH, must be obtained in writing to insure that policy restrictions are considered for each situation and to prevent the misuse of VMNH specimens, staff time, facilities, and equipment.

A. Requests by VMNH staff to reproduce specimens for the purpose of research, educational programs, or exhibits must state the procedures and materials that will be used. Requests must have the approval of the relevant Research Curator/Manager of DEPP. Any reproduction activity of a specimen must be documented in the specimen's permanent record.

B. Requests by non-VMNH staff to reproduce specimens for the purpose of research, educational programs, or exhibits, should include the following information for consideration and evaluation by the appropriate Research Curator/Manager of DEPP:

a. the purpose of the intended use;

b. the reproduction procedure and materials that will be used;

c. the name(s) of all individual(s) who will produce the reproduction;

d. where the work will be done; and

e. if VMNH staff and materials are to be used, how the materials and personnel time will be accounted and paid for.

Requests must have the signed approval of the relevant Research Curator/Manager of DEPP and the Collections Manager, using the Reproduction Agreement form (Appendix XIV).

C. Requests to reproduce specimens for artistic reference or commercial purposes must include:

a. the purpose of the intended use;

b. the reproduction procedure and materials that will be used;

c. the name(s) of all individual(s) who will produce the reproduction;

d. where the work will be done; and

e. how proceeds from a sale are to be distributed.

Requests must have the signed approval of the Research Curator/Manager of DEPP, the VMNH Deputy Director and/or the VMNH Executive Director, and they are subject to restrictions stated in these policies. A Contractual Agreement, such as a Memorandum of Understanding, will be drafted with the conditions and requirements for this type of use and must be signed by both parties involved. Copies of all documents should become part of the specimen(s) permanent record.

VII. Deaccessions

A. General Considerations - Deaccessioning is the formal process used to ~~remove~~ permanently remove an accessioned specimen from the collection in order to improve the overall quality of VMNH collections. This definition presupposes that the specimen in question was once accessioned, that it was formally accepted and recorded as ~~an object~~ specimen worthy of collection status.

VMNH may deaccession any specimen for which it has documentation of unencumbered title or ownership, subject to the guidelines of this policy and regulations of the Commonwealth of Virginia. To deaccession specimens for which the Museum has an encumbered title, it is necessary to research the conditions of the title, to make every effort to contact the original donor/collector to clarify the intent of the conditions and to seek legal counsel to assist with the process.

Specimens may be deaccessioned due to one or more of the following reasons:

1. The specimen does not fall within the scope of VMNH collections as described in these policies.
2. The specimen has deteriorated to such an extent that it cannot be preserved or used.

3. The specimen is redundant and no alternative use can be determined.
4. The specimen poses a health or safety hazard.
5. The museum ~~can not~~cannot provide adequate care for the specimen.
6. The specimen is occupying space and using valuable resources that could better be used to improve or strengthen the collections in order to further the Museum goals.

B. Disposal of Specimens - State purchased and inventoried surplus property that has been deaccessioned shall be disposed of in accordance with the Commonwealth of Virginia Department of General Services surplus property procedures for disposition. Property and specimens gifted to the VMNH Foundation, an independent non-profit that does work on behalf of VMNH, shall not be subject to state surplus property procedures and shall be disposed of in the prioritized methods noted below. Following deaccessioning, specimens will first be offered to the VMNH ~~Department of Education and Public Programs (DEPP)~~ to be included in their non-accessioned inventory of specimens. If DEPP does not want the specimens, they will then be transferred preferentially to other non-profit research and/or educationally-oriented institutions with the ability to provide care appropriate to the original use of the specimen. By preference, specimens will remain in Virginia institutions; however, it is an overriding concern that the specimens be placed in a facility that will provide appropriate care and ensure access for research and educational uses. Specimens that fall under the provisions of state, federal or international legislative restrictions or recommendations established by professional disciplines may necessitate special considerations for deaccessioning and transfer. The following are prioritized methods of disposal:

1. Exchange;
2. Donation to a research/educational institution or organization;
3. Transfer to other state agencies;
4. Sale;
5. Destruction, if the specimen has become badly infested or has deteriorated beyond usefulness.

Specimens that have deteriorated beyond usefulness or that pose an insurmountable health or safety hazard due to inherent vice (e.g., asbestos, disease, harmful breakdown products) or treatment history, may be destroyed upon written approval of the Collections Committee, ~~followed by the Director of Research and Collections, followed by and~~ the VMNH Executive Director.

Deaccessioned specimens may not be transferred by any means to employees, trustees, non-paid research associates, volunteers or members of immediate families or their agents.

C. Sales - Sales of deaccessioned specimens are not recommended for most natural history specimens. Sales should be considered only as a last option before destruction of samples. By preference, specimens should first be exchanged, transferred or donated to another repository as described above.

In cases where gifts, exchanges, or transfers do not apply, specimens may be sold, provided that discipline-specific ethics and practices are observed and conflict of interest, real or perceived, is avoided. Sales must be conducted in such a way that they do not contribute to the existence of illegitimate markets, the destruction of resources or sites, illegal trade, or unethical behavior. Specimens sold at public auction may not be purchased by anyone directly associated with the Museum, including trustee members, employees, non-paid research associates, volunteers, or members of their immediate families or their agents. Museum representatives may not directly and/or personally gain or benefit from specimen dispersals.

State purchased and inventoried surplus property that has been deaccessioned shall be disposed of in accordance with the Commonwealth of Virginia Department of General Services surplus property procedures for disposition. Property and specimens gifted to the VMNH Foundation, an independent non-profit that does work on behalf of VMNH, may be sold through public sales or public auctions only. Specimens deaccessioned from museum collections may not be sold through the museum store. Funds received through sales of deaccessioned specimens shall be used only for the acquisition of collections or ~~off~~ materials directly related to the maintenance and preservation of VMNH collections, subject to the approval of the Collections Committee and the Executive Director.

D. Approval Process - Deaccessioning includes two basic activities: an approval process and a registration process. Policies concerning those processes are as follows:

1. Recommendations for deaccessioning are brought to the Collections Committee and shall be reviewed by the Committee in consultation with the appropriate Research Curator/~~Director~~ Manager of DEPP. ~~Any~~The Research Curator/~~Director~~ Manager of DEPP involved must recuse themselves as a Committee member if they are a member of the Collections Committee. A thorough investigation of the records shall be made to be certain that limitations to outright ownership by VMNH of a specimen, such as terms of any gift, bequest or exchange, would not be violated by the deaccessioning. Stipulations set forth under collecting or storage permits granted by state, federal or international entities must also be considered. Specimens that are on loan to VMNH which cannot be satisfactorily returned to their lenders may come under the provisions of abandoned property laws (Appendix ~~XIV~~-XV). VMNH shall consult with legal counsel.

2. Written recommendations describing the specimen(s) in question, the purpose for the deaccession, the estimated value, and the method of disposal are submitted to the Collections Committee using a Deaccession form (Appendix ~~XV~~-XVI). This Committee may accept by a majority vote the recommendations or provide alternative suggestions.

3. All recommendations concerning deaccessions that are made by the Collections Committee will be forwarded to the Executive Director ~~of Research and Collections~~ for approval. If a Research Curator/~~Director~~ Manager of DEPP and the Collections Committee offer opposing recommendations concerning a potential deaccession, a thorough summary of both recommendations will be presented to the VMNH Deputy Director ~~of Research and~~

~~Collections.~~ Following recommendation by the Collections Committee, or the VMNH Deputy Director of Research and Collections when necessary, all deaccession requests will be forwarded to the VMNH Executive Director, who will then make a recommendation decision. All deaccession requests will then be forwarded to the Research and Collections Committee of the Board of Trustees for approval.

The Research and Collections Committee of the Board of Trustees has the authority to approve on behalf of the Board of Trustees all deaccessions. Outside independent appraisals must be obtained prior to the disposal of specimens whenever requested by the Director of Research and Collections, the VMNH Executive Director or Chairman of the Research and Collections Committee of the Board of Trustees and in all cases when the value of the specimen(s) in question exceeds \$1025,000.

4. Reasons for reversing decisions recommended by the Collections Committee ~~and/or Director of Research and Collections~~ and/or the VMNH Executive Director by the Research and Collections Committee of the Board of Trustees will be documented and reviewed by the entire Board. In such cases, a review panel comprised of 3 members chosen from the Board would be formed to study the potential deaccession in question and report to the Board. One member would be picked by the Collections Committee, one member appointed by the Research and Collections Committee of the Board of Trustees, and a third member, who will serve as Chairperson, selected by the other two panel members. Final authority for accepting or rejecting potential deaccessions remains with the Board of Trustees.

E. Exceptions - Deaccessioning is generally not permitted for the following specimens: type specimens (as defined and designated by each department to represent disciplinary standards), extinct biological/non-fossil specimens representing extinct species, specimens representing known endangered species, voucher collections, figured or illustrated specimens or other specimens that are described in professional or scientific publications. Departments may specify other unusually valuable specimens that may not be deaccessioned; such a designation should be preferentially made when the specimen is accessioned. Recommended exceptions to the above shall be made according to the approval policy for deaccessions outlined above. These protected specimens represent the core value of the museum and should be protected to the extent possible given current Collections Management standards and practices. Full documentation shall be retained for these specimens. Should it become necessary to deaccession any specimens that fall into these exceptions, priorities for disposal of specimens will follow VII, B items 1–5 above.

F. Unclaimed Specimens - On occasion, specimens brought or loaned to the museum are not reclaimed by the original owner. In such cases, VMNH shall make reasonable efforts to identify the owner(s) and to return the specimen(s) to the rightful owner(s) as allowed by law.

1. Notice of Termination of Loan - After expiration of the specified term of a documented loan, the museum Registrar shall mail a notice of termination of a loan to the lender at the most recent address of the lender as shown on the museum's records pertaining to the property on loan. If the museum has no address in its records, or the museum does not receive written proof of receipt of the mailed notice within thirty days of the date the notice was mailed, the museum shall cause to be published notice at least once a week for three consecutive weeks in a newspaper of general circulation in the county or city in which the museum is located, and in a

newspaper of general circulation in the county or city of the lender's last known address, if different from the county or city in which the museum is located.

If the lender cannot be reached and does not reclaim the loaned property, the Museum shall post a notice to terminate the loan on the Museum's official Internet Website. This notice shall include:

- a. The name and address, if known, of the lender;
- b. The date of the loan;
- c. The name, address, and telephone number of the appropriate office or official to be contacted at the museum for information regarding the loan; and
- d. Any other information deemed necessary by the museum.

If after one year, no claim has been made for the loaned property, said property shall be deemed to have been donated to the Museum.

2. Acquiring Title to Undocumented Property - ~~The museum~~ [VMNH](#) shall have the authority to acquire legal title to undocumented property if the museum can verify through written records that it has held such property for five years or longer, during which period no valid claim to the property has been asserted and no person has contacted the museum regarding the property, by complying with the following procedure:

a. The museum shall cause to be published a notice once a week for two consecutive weeks in a newspaper of general circulation in the county or city in which the museum is located, and in a newspaper of general circulation in the county or city of the lender's last known address, if different from the county or city in which the museum is located. The notice shall include:

1. A brief and general description of the property;
2. The date or approximate date of the loan or acquisition of the property by the museum, if known;
3. Notice of the museum's intent to claim title to the property if no valid claims are made within sixty-five days following the date of the first publication of the notice under this subdivision;
4. The name, address and telephone number of the representative of the museum to contact for more information or to make a claim; and
5. If known, the name and last known address of the lender.

b. If no valid claims have been made by the end of the sixty-five day period following the date of the first publication of the notice under subdivision 1.a.3 of this subsection, the museum shall

cause to be published a second notice once a week for two consecutive weeks in a newspaper of general circulation in the county or city in which the museum is located, and in a newspaper of general circulation in the county or city of the lender's last known address, if different from the county or city in which the museum is located. The second notice shall include:

1. A brief and general description of the property;
2. The date or approximate date of the loan or acquisition of the property by the museum, if known;
3. Notice that the museum claims title to the property as of the date of the end of the sixty-five day period following the date of the first publication of the notice under subdivision 1 of this subsection; and
4. If known, the name and last known address of the lender.

Upon compliance with the requirements set forth in subsection 2.a, clear and unrestricted title is transferred, as of the date specified in subdivision 2.a.3 of this section, to the museum and not to the Commonwealth.

G. Documentation - All reviews and deaccessioning decisions will be documented according to professional standards. Research Curators/~~Director~~Manager of DEPP and the Registrar are responsible for fully documenting deaccessions and updating collections records to reflect such activities.

H. Dissolution of VMNH - The Commonwealth of Virginia has mandated through legislation that VMNH was established as a "state museum of natural history ... where specimens of natural history, especially those of Virginia origin, can be properly housed, cared for, catalogued and studied" and that it serves as "a permanent repository of our natural heritage" (Code of Virginia C.20, Title 10.1). VMNH employees and Board of Trustees strongly endorse this purpose as a critical component of the Museum's mission. In the event that VMNH should cease to exist, the Commonwealth shall have the authority to transfer the specimens to another institution that agrees to maintain and preserve the collection consistent with the purposes stated in the VMNH Collections Policy.

VIII. Revisions to the VMNH Collections Policies

Revisions to these policies may be submitted in writing at any time to the Collections Committee for discussion. Based on a majority vote, the Committee shall recommend acceptance or refusal of the revision. The submitted revision and the Committee's recommendation shall be forwarded to the ~~Director of Research and Collections, the~~ VMNH Executive Director and the Research and Collections Committee of the Board of Trustees for their consideration. Final approval of revisions rests with the Board of Trustees.

The VMNH Collections Policies shall be formally reviewed and updated at least once every five years. It is the responsibility of the Collections Manager to coordinate this review process.

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APPENDIX 1.

APPENDIX I. DEFINITIONS

Acquisition – the act of acquiring museum objects/specimens through gift, bequest, purchase, transfer, field collection, etc. Not all acquisitions are accessioned. Acquisitions may be placed in hands-on/educational collections, permanent collections, or the library and archives collections.

Accession – the act of recording/processing an addition to the permanent collection by means of assigning a unique number that allows the museum to connect an object to its documentation.

Cataloging – the creation of a full record in complete descriptive detail of all information available about a specimen or group of specimens, cross-referenced to other records and files; includes the process of classifying and documenting specimens in detail.

Collections – specimens, documents, and associated data under the Museum’s care.

Deaccessioning – the process of removing an accessioned specimen or group of specimens by a specified procedure from the museum’s permanent collections; includes gifts, transfers, exchanges.

Inventorying — the creation of an itemized list of specimens or group of specimens that identifies each accession’s physical location and movement (i.e., history of physical locations of specimens).

Plans — written statements outlining the specific goals of museum personnel regarding collections activities. These statements ~~included~~include timelines for carrying out goals, responsibilities of individuals involved in carrying out goals, and the resources needed to carry out goals. These statements are bound by a specific time period and are revised once that time period has ended.

Policies – written statements that establish standards and a framework for decisions regarding collections activities. These statements must be approved by the governing authority.

Procedures - detailed step-by-step instructions on how to implement policies. These instructions do not have to be approved by the governing authority.

Specimens – biological, geological, paleontological, or archeological objects, items, or materials; replicas, casts, models; items created and managed in digital form; and any other parts, or parts thereof, that fall within the disciplinary scope of the museum’s collections.

APPENDIX II.

APPENDIX II. EXCERPTS FROM CODE OF VIRGINIA: **Museum Creation and Purposes**

§§ 10.1-2000. Museum created; essential governmental function.

There is hereby created an institution of the Commonwealth of Virginia to be known as "The Virginia Museum of Natural History," hereinafter referred to as the "“Museum." The Museum is hereby declared to be a public body and instrumentality for the purpose of preserving and protecting Virginia's natural history. The exercise by the Museum of the powers conferred by this chapter shall be deemed an essential governmental function.

(1988, cc. 707, 891.)

§§ 10.1-2001. Purposes.

The purposes of the Virginia Museum of Natural History are:

1. To investigate, preserve and exhibit the various elements of natural history found in Virginia and other parts of the United States and the world;
2. To foster an understanding and appreciation of how man and the earth have evolved;
3. To encourage and promote research in the varied natural heritage of Virginia and other parts of the world;
4. To encourage individuals and scholars to study our natural history and to apply this understanding of the past to the challenge of the future;
5. To establish a state museum of natural history in Virginia where specimens of natural history, especially those of Virginia origin, can be properly housed, cared for, cataloged and studied and to ensure a permanent repository of our natural heritage; and
6. To coordinate an efficient network in Virginia where researchers and the public can readily use the natural history material of the Museum, its branches, Virginia's institutions of higher education and other museums. These purposes are hereby declared to be a matter of legislative determination.

(1988, cc. 707, 891.)

Virginia Museum of Natural History (VMNH) Conflict of Interest Policy
21 June 1990 – updated 19 September 2005 – 2nd revision 6 July 2012

Application: This policy applies to all museum positions whether covered or non-covered under the Virginia Personnel Act, whether full-time or part-time, or paid on a salaried or on an hourly basis.

In the Code of Virginia, Chapter 31, Sections 2.2-3100 through 2.2-3131, the “State and Local Government Conflict of Interest Act” (the Act) is detailed. Copies of the Act are available online at <http://leg1.state.va.us/cgi-bin/legp504.exe?000+cod+TOC0202000003100000000000> ~~for perusal for perusal.~~ Employees must be aware of the parameters of the Act and how it affects their employment activities. The salient points in relation to employment of family members and outside employment are summarized below.

It is incumbent upon the individual employee to notify the museum’s administration of any potential areas of conflict of interest and to provide adequate assurances that no conflict of interest exists in a situation. The Conflict of Interest Act states that any employee who knowingly violates the Act can be convicted of a misdemeanor, contracts and sales can be voided, and any monies made can be forfeited back to the State.

- I. **~~I.~~—Employment of Spouses and Family Members:** The VMNH cannot allow the direct or indirect supervision by the employee of any member of their immediate family. Immediate family is a spouse or any other person residing in the same household who is a dependent of the employee. Dependent is defined as son, daughter, father, mother, brother, or sister, or other person whether or not related by blood or marriage if such person receives from the employee, or provides to the employee, more than one half of his/her financial support.

The employee cannot “exercise any control over the employment or employment activities of the member of his/her immediate family [spouse or dependent as defined above] and the employee [cannot be] in a position to influence those activities.”

An employee can have a personal interest in a contract with an immediate family member or dependent as long as they do not exert any control over the family member’s/dependent’s employment activities.

If there is any doubt that there is a conflict in this area, the employee may request an advisory opinion from the Attorney General’s office (Section 2.2.-3121).

- II. **Outside Consulting or Employment:** An employee cannot “accept any money, loan, gift, favor, service, or business or professional opportunity that reasonably tends to influence him in the performance of his official duties...or accept any business or professional opportunity when the employee knows that there is a reasonable likelihood that the opportunity is being afforded the employee to influence him/her in the performance of the employee’s official duties.”

In addition, Department of Human Resource Management (DHRM) Policy 1.60 “Standards of Conduct” states that “employees must comply with the letter and spirit of ...the Conflict of Interest Act, and Commonwealth laws and regulations” and also that employees must “obtain approval from [their] supervisor prior to accepting outside employment.” Failure to follow these directives may result in disciplinary action or termination under museum or DHRM policy.

- A. Policy for Consulting/Working during Non-Museum Hours: Even if the employee is performing outside, non-museum work during non-working hours, such work may be prohibited. This would occur if that outside work is seen by the supervisor as having the potential to affect, or is actually affecting, the employee’s performance at the museum. The employee must notify his/her supervisor in writing in advance of any outside work or consulting in order to prevent a misunderstanding of the effect of such work on their museum work.
- B. Policy for Consulting/Outside Work During Museum Hours: If there is no conflict of interest on an outside employment or consulting situation during normal working hours, the VMNH’s policy is as follows: If an employee is to regularly engage in activities for pay that are related to his/her museum duties, written approval from the Executive Director must first be obtained.

If approved, the payment for such services will be paid to VMNH and credited back to the employee’s department; or payment may be deposited to the VMNH Foundation. Any other expenses (e.g., mileage, telephone calls, photocopying) incurred by such regular activities will also be paid by the outside institution or person seeking the employee’s services. (A curator giving one or two lectures in a team-taught course or any staff person giving occasional guest lectures does not qualify as a regular activity.)

“No officer or employee shall...Accept any honoraria for any appearance, speech, or article in which the officer or employee provides expertise or opinions related to the performance of his official duties. The term “honoraria” shall not include any payment for, or reimbursement to, such person for his actual travel, lodging, or subsistence expenses incurred in connection with such appearance, speech or article, or in the alternative, a payment of money or anything of value not in excess of the per diem deduction allowable under § 162 of the Internal Revenue Code, as amended from time to time. The prohibition in this subdivision shall apply only to the Governor, Lieutenant Governor, Attorney General, Governor’s Secretaries, and heads of departments of state government...” [Code Section 2.2-[3103\(7\)](#)].

~~3103(7)].~~

III.

Other Potential Areas of Conflict:

The Act also states that an employee cannot “offer or accept any money or other thing of value for, or in consideration of, obtaining employment, appointment, or promotion for any person with any government or advisory agency” and cannot “offer or accept any money or other thing of value for,

~~APPENDIX III. Page 3 of 3~~

or in consideration of, the use of his public position to obtain a contract for any person or business with any governmental or advisory agency.”

In addition, a state employee cannot “solicit or accept money or other thing of value for services performed within the scope of his official duties, except the compensation, expenses or other remuneration paid by the agency of which he is an officer or employee.” This means that the employee cannot receive payment for outside work during the same hours for which the employee was also being paid by VMNH and for performing activities within the scope of their normal job duties. Again, this is an area where, if a question arises as to whether a conflict of interest exists, an advisory opinion may be requested from the Attorney General’s office.

IV. **Responsibility for Notification:** The employee has the responsibility to notify his/her supervisor or the museum’s administration in advance of any outside activities, including volunteer service. An example of such service would include acting as a Board member for another organization. For all areas discussed above, the museum’s administration has the responsibility to ask questions in the event that a potential conflict appears to exist. The employee has the responsibility to assure the museum’s administration that no conflict exists.

~~APPENDIX IV. CODES OF ETHICS AND PROFESSIONAL GUIDELINES~~

~~AAM Policy Regarding the Repatriation of Native American Ceremonial Objects and Human Remains. 1988. (American Association of Museums)~~

~~Code of Ethics for Museums; Adopted 1993 by the AAM Board of Directors and amended in 2000. Please note that the Code of Ethics for Museums references the American Association of Museums (AAM), now called the American Alliance of Museums (AAM). <https://www.aam-us.org/programs/ethics-standards-and-professional-practices/code-of-ethics-for-museums/>~~

~~AAM Code of Ethics and Professional Practices for Collections Professionals. Revised 24 February 2021. American Alliance of Museums. https://www.aam-us.org/wp-content/uploads/2021/03/Code_Ethics_Collections_Professionals_2021_02_24.pdf~~

~~Direct Care of Collections: Ethics, Guidance and Recommendations. 2019. American Alliance of Museums. https://www.aam-us.org/wp-content/uploads/2018/01/Direct-Care-of-Collections_March-2019.pdf~~

~~AIC Code of Ethics and Guidelines for Practice. 1994. (The American Institute for Conservation of Historic and Artistic Works). <https://www.culturalheritage.org/about-conservation/code-of-ethics>~~

~~American Ornithologists' Union. 1986. Report of the *ad hoc* committee on Guidelines for the use of wild birds in research. *Auk* 105 (1, Suppl.): 1A-41A.~~

~~ICOM Code of Ethics for Natural History Museums. 2013. International Council of Museums. https://icom.museum/wp-content/uploads/2018/07/nathcode_ethics_en.pdf~~

~~ICOM Code of Ethics, ~~Museum Store Association~~. 2009. for Museums. 2004. International Council of Museums. <https://icom.museum/wp-content/uploads/2018/07/ICOM-code-En-web.pdf>~~

~~Code of Ethics for Curators. 2009. (American ~~Association~~Alliance of Museums Curators Committee).~~

~~Code of Ethics for Museums. 1993. (American Association of Museums) <https://www.aam-us.org/wp-content/uploads/2018/01/curcomethics.pdf>~~

~~Code of Ethics for Registrars. ~~1984~~. ~~(2021. Collections Stewardship of the American Alliance of Museums (CS-AAM) and the Association of Museums Registrars Committee) Code of Ethics and Collections Specialists (ARCS)~~. <https://www.arcsinfo.org/about/code-of-ethics>~~

~~Professional Ethics of the American Library Association. 2017. ~~2008~~. (American Library Association), Document ID: 39f580a8-833d-5ad4-f900-53ecfe67eb1f. <http://www.ala.org/tools/ethics>~~

~~ICOM Code of Ethics for Museums. 2006. (International Council of Museums)~~

~~Documentation Guidelines for the Preparation and Conservation of Biological Specimens. 1989. (Society for the Preservation of Natural History Collections)~~

~~Documentation Guidelines for the Preparation and Conservation of Paleontological and Geological Specimens. 1988. (Society for the Preservation of Natural History Collections)~~

~~Guidelines for Acquisition and Management of Biological Specimens. 1982. (, 2000. Museum Store Association of_~~
~~https://www.wipo.int/export/sites/www/tk/en/databases/creative_heritage/docs/msa_code_et_hics.pdf~~

~~Museum Education Principles and Standards. 2005. Education Committee of the American Alliance of Museums.~~
~~https://drive.google.com/file/d/0Bz_5mDyp81VsT114c1BtWFFLT1k/edit?resourcekey=0-4Ieb3o99RMMmqoTsUgLD3A~~

~~APPENDIX IV. Systematics Collections)~~

~~Guidelines for Herpetological Museum Collections: The Ethics of Maintenance and Use. 1986. (Joint Herpetological Resources Committee)~~

~~Page 2 of 2~~

~~Guidelines for Use of Live Amphibians and Reptiles in Field and Laboratory Research, Second Edition. 2004. (Revised by the Herpetological Animal Care and Use Committee (HACC) of the American Society of Ichthyologists and Herpetologists).~~
~~https://static1.squarespace.com/static/618bf11a71fcdf5398996eda/t/618fbed9a68bdd5cbcc95f78/1636810457669/guidelines_herps_research_2004.pdf~~

~~Guidelines for Use of Fishes in Research. 2013. UFR (Use of Fishes in Research) Committee, American Fisheries Society, Bethesda, Maryland.~~
~~<https://static1.squarespace.com/static/618bf11a71fcdf5398996eda/t/618fbed1f40e6c713dfa71ee/1636810449675/asf-guidelines-use-of-fishes-in-research-2013.pdf>~~

~~Guidelines for Archaeological Material and Ancient Art. 2008. American Alliance of Museums.~~
~~<https://www.aam-us.org/programs/ethics-standards-and-professional-practices/archaeological-material-and-ancient-art/>~~

~~Best Practices in Collections Management. 2016. Society for the Preservation of Natural History Collections. https://spnhc.biowikifarm.net/wiki/Collection_Management~~

~~A Resource for Managing Paleontology Collections. American Museum of Natural History.~~
~~<http://collections.paleo.amnh.org/>~~

American Ornithologists' Union. 1986. Report of the *ad hoc* committee on Guidelines for the use of wild birds in research. Auk 105 (1, Suppl.): 1A-41A.

APPENDIX IV. Page 2 of 2

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Malaro, Marie C. ~~1998~~ and Ildiko DeAngelis. 2012. A Legal Primer on Managing Museum Collections, ~~Second~~ Third Edition. Washington, D.C.: Smithsonian Institution Press.

Principles of Archaeological Ethics. 1996. (Society for American Archaeology).
<https://www.saa.org/career-practice/ethics-in-professional-archaeology>

Sikes, R. S., ~~W. L. Gannon,~~ and the Animal Care and Use Committee of the American Society of Mammalogists. ~~2011~~ 2016. Guidelines of the American Society of Mammalogists for the use of wild mammals in research ~~and education~~. Journal of Mammalogy ~~92(1):235-253~~ 97(3):663-688, 2016.

~~mammals research 0~~

http://www.mammalsociety.org/uploads/committee_files/CurrentGuidelines.pdf

Title 36: Parks, Forests, and Public Property, Part 79 – Curation of Federally-owned and Administered Archaeological Collections *in*: Electronic Code of Federal Regulations. (Administration Committee of the Federal Register).

~~idx?c=ecfr&sid=785643449e58c94d401e37762a37ed3e&rgn=div5&view=text&node=36:1.0.1.1.39&idno=36 (accessed on 4/30/2012)~~

<https://www.nps.gov/subjects/archeology/curation-of-federally-owned-and-administered-archaeological-collections-36-cfr-79.htm>

25 U.S.C. 32: Native American Graves Protection and Repatriation Act of 1990

<https://www.nps.gov/subjects/archeology/napgra.htm>



APPENDIX V. ~~PERSONAL COLLECTION DISCLOSURE STATEMENT~~ (Page 1 of 3)

PERSONAL COLLECTION DISCLOSURE STATEMENT



This form constitutes a report of specimens or artifacts that fall within the scope of the Museum's collections as described in the VMNH Collections Policies.

This form is to be filed by:

Members of VMNH Board of Trustees; VMNH Foundation Board of Directors; employees; non-paid associates; and, volunteers of VMNH.

This form shall be completed upon affiliation with VMNH and updated every five years (minimum). As a condition of assuming appointment, office, or employment, this form constitutes a report of specimens or artifacts at time of filing. Updates need only indicate additional collections/items received since the time of the last filing of this form. Updated forms shall have a filing deadline of January 15th of the year they are due to be updated. A form shall be submitted whether a person has personal holdings/updates or not.

The information required on this form must be provided on the basis of the best knowledge, information, and belief of the individual filing the form, as of the date of this report unless otherwise stated.

This Personal Collection Disclosure Statement Form is open for public inspection.

Original copies of the Personal Collection Disclosure Statement Form are held by the VMNH Registrar. Copies of forms containing a declaration of personal materials shall be submitted to the VMNH Executive Director, Chairman of the Research and Collections Committee of the Board of Trustees and the Chairman of the Board of Trustees.

DEFINITIONS

“Specimen” refers to biological, geological ~~(including paleontology specimens), archaeological artifacts,~~ paleontological, or archeological objects, items, or materials; replicas, casts, models; items created and managed in digital form; and any other ~~objects~~ parts, or parts thereof, that fall within the disciplinary scope of the museum's collections.

“Scope” refers to the disciplinary scope of the museum's collections as defined by the Board approved Collections Policies, including both primary fields and ancillary materials associated with these fields.

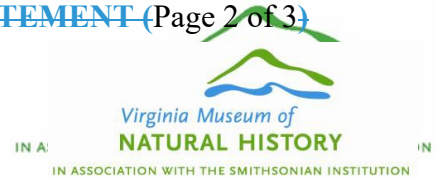
“Personal Collection” refers to one or more specimens owned by the individual completing the form, including specimens found, purchased, and received by gift or bequest.

“Catalog”, for the purposes of this form, is defined as a listing of specimens that includes sufficient detail to unequivocally identify individual specimens. The detail may be associated with specimens through a numbering system whereby each specimen has a unique number. Although a catalog of the personal collection is not required, a catalog is recommended as the best method for identifying the contents of a collection.

21 Starling Avenue, Martinsville, VA 24112, T. 276 634 4141 F. 276 634 4199 E. information@vmnh.virginia.gov W. www.vmnh.net Rev. ~~May 2012~~ April 2022

APPENDIX

APPENDIX V. PERSONAL COLLECTION DISCLOSURE STATEMENT (Page 2 of 3)



PERSONAL COLLECTION DISCLOSURE STATEMENT FORM

NAME (please print): _____
 Office or Position Title: _____
 Held or Sought: _____
 Held or Sought: _____
 Home Address: _____
 Telephone: (home) _____ (office) _____
 Telephone: (home) _____ (office) _____

Do you own one or more specimens that fall within the scope of collections owned by VMNH as defined by the VMNH Collections Policies?

Scope - The disciplinary scope of research collections maintained by VMNH encompasses the fields of biology, geology and archaeology.

YES (complete rest of form)

NO (sign and date form)

DESCRIPTION AND LIST OF SPECIMEN(S)

Discipline(s): _____
 Number of specimens: _____
 Discipline(s): _____
 Number of specimens: _____

Does a catalog of specimens exist? YES NO PARTIAL

If YES, please provide a copy of the catalog with this form.

If NO, or if the catalog is only PARTIALLY COMPLETE, please describe the specimens in greater detail. Indicate quantity of specimens, general taxonomic and/or geographic coverage, extent of documentation, and method(s) of acquisition. Use continuation sheet if additional room is needed.

Quantity Specimen Description, including identifying characteristics How and When Acquired

Have the specimens been appraised? YES NO PARTIALLY

Were these specimens acquired to fulfill obligations to an employer? YES NO PARTIALLY

Employer's name: _____

Address: _____

Employer's name: _____

Address: _____

Date(s) of employment: _____

I swear or affirm that the foregoing information is full, true, and correct to the best of my knowledge.

SIGNATURE: _____

DATE: _____

DATE: _____

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APPENDIX V. ~~PERSONAL COLLECTION DISCLOSURE STATEMENT~~ (Page 3 of 3)



PERSONAL COLLECTION DISCLOSURE STATEMENT FORM - continuation sheet

Page: _____ of _____

NAME (please print): _____

DESCRIPTION/LIST OF SPECIMEN(S) continued:

Quantity Specimen Description, including identifying characteristics How and When Acquired

I swear or affirm that the foregoing information is full, true, and correct to the best of my knowledge.

SIGNATURE: _____ DATE: _____

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APPENDIX VI. (front of form)

RECORD OF INCOMING MATERIAL FORM (~~front of form~~)



RECORD OF INCOMING MATERIAL FORM

Material Received From: _____ Date: _____
Address: _____
Phone: _____ Phone: _____

I understand that if I do not claim the object(s) listed on this form within TWO MONTHS, then it (they) will be considered abandoned property, and I will forfeit ownership. In such cases, VMNH will handle the object(s) in accordance with its Collections Policies. (signature) _____ (date) _____

PURPOSE: _____ potential acquisition _____ request identification
METHOD ACQUIRED:

GIFT (need donor signed Deed of Gift form attached to RIM)	Photographs?	YES	NO
INTERAGENCY TRANSFER (need copies of transfer documentation)	Field Notes?	YES	NO
EXCHANGE (need copies of exchange documentation)	Permits?	YES	NO
SALVAGED MATERIAL	Correspondence?	YES	NO
PURCHASE: Price _____ Funds Used _____	Other Data?	YES	NO
FIELD WORK: General dates of field trip: _____			
Locality: _____			
Field Numbers: _____			
Collectors(s): _____			

TOTAL NUMBER OF ITEMS: _____ DATE SPECIMENS RECEIVED AT MUSEUM: _____

LOCATION OF SPECIMENS WITHIN MUSEUM: _____

List of Incoming Material: _____

# of specimens (and description)	Common Name (Genus Species Subspecies)	Locality Information (State, City/County, detail location information, include nearest waterbody)	Collector & Date(s) Collected
-------------------------------------	---	--	-------------------------------

For biological specimens, include the following in the information noted above:

1. ~~1~~-Lat/Long (in Decimal Degrees -you can get this info from websites (e.g., <http://itouchmap.com/latlong.html>)
2. ~~2~~-Type of Specimen(s) Collected (e.g., whole specimen, feather, nest, partial-what part)
3. ~~3~~-Distribution (where specimen is kept, was it brought to Martinsville, kept in Charlottesville, Newport News, etc.)
4. ~~4~~-Comments (include other pertinent information such as tags on the specimen)

IDENTIFICATIONS:

Made By: _____
 Date: _____
 Date Owner Notified (1) _____
 (2) _____
 (3) _____

POTENTIAL ACQUISITIONS:

Department Name: _____
 Date of Department Review: _____
 Under acquisition plan? _____ YES _____ NO
 Recommend To: _____
 _____ ACCEPT _____ NOT ACCEPT
 Recommend to Accession: _____ YES
 _____ NO
 Level of Care Assigned (see back of RIM for details): _____
 Reviewed By: _____

Date Material Returned: _____
 Date Material Abandoned: _____

RIM NUMBER ASSIGNED: _____

ACCESSION NUMBER ASSIGNED: _____

RECORDED BY: _____

DATE: _____ **BY:** _____

DATE RECORDED: _____

VMNH Catalog Numbers: _____

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APPENDIX VI. ~~RECORD OF INCOMING MATERIAL FORM~~ (back of form)

List of Incoming Material – continued:

# of specimens (and description)	Common Name (Genus Species Subspecies)	Locality Information (State, City/County, detail location information, include nearest waterbody)	Collector & Date(s) Collected
-------------------------------------	---	--	-------------------------------

Care Level Information

Collections are maintained by the curatorial departments and the Department of Education ~~and~~ Public Programs for research as well as for education and exhibits. Specimens housed within these collections are defined by their relative significance for research and education and by the levels of supervision required for care and maintenance:

1) Strict Supervision - these include objects/specimens of greatest value for research purposes. They demand the highest level of supervision for use, management and conservation practices and the greatest security. These are frequently referred to as the "permanent collection" of an institution and are appropriate for indefinite retention. Primary and paratype specimens should be included in this designation.

2) Moderate Supervision - these include good quality objects/specimens for use as reference material by the general public, for exhibit, for exchanges or for instructor use in educational programs. They demand supervised handling and careful management practices, but the restrictions on use are not as strict as with the first category.

3) Low Supervision - these include objects/specimens that require minimal or no supervision for handling. This category includes objects/specimens that have been deemed of no value for research or exhibit purposes as well as "hands on" material that may be used for teaching or exhibition purposes. Given the potential for damage and loss of these objects/specimens, these collections will not be accessioned by VMNH but will be inventoried for management purposes.

It is the responsibility of the Research Curator or representative from DEPP, in consultation with appropriate staff, to recommend the designation of departmental specimens to these categories. These designations can change over time and will guide decisions concerning how the specimens may be used. The coded designation will be entered into the ~~main~~ catalog as a separate field which can be edited if a specimen's status is changed.

APPENDIX VII. Page 1 of 3

SITE VISIT FORM ~~(Page 1 of 3)~~



SITE VISIT FORM

Date of visit: _____ by: _____

Name of site/collection/institution: _____

Name of contact with collections: _____

Phone Number(s): _____

<u>Has a Record of Incoming Material form been completed?</u>	<u>Yes</u>	<u>No</u>
<u>Has the collection been formally offered to VMNH?</u>	<u>Yes</u>	<u>No</u>
<u>Or, is this a pre-offer visit?</u>	<u>Yes</u>	<u>No</u>

IMPORTANCE OF COLLECTION, describe importance and general contents of collection:

QUANTITY AND PHYSICAL CONDITION, be as accurate as possible:

Quantity of specimens (individuals, lots, etc.):

Quantity, type, and condition of containers (i.e., current storage conditions, jars, lids, boxes, drawers, cases, kind of alcohol, etc.):

Do specimens show signs of deterioration? YES NO SOME
If some do, what percentage? _____% _____%

Are labels and/or accompanying documentation legible? YES NO SOME
If some are not, what percentage? _____% _____%

APPENDIX VII. [Page 2 of 3](#)

SITE VISIT FORM (page 2 of 3)



SITE VISIT FORM — continued

COVERAGE - TAXONOMIC or SCIENTIFIC NOMENCLATURE:

1. ~~1.~~—It is ALL of one major group (i.e., class, order, family, rock type, etc.)?
YES NO

2. ~~2.~~—List groups represented MAJOR subgroups within each group approx. quantity

3. ~~3.~~—What percentage of the material has been sorted by taxonomic group? _____% _____%
And/or, by ecological grouping (or, by locality)? _____%

5. ~~4.~~—What percentage of the material has been identified at least to level of:

a. ~~a.~~—Class _____% ~~b.~~ _____%
b. Order _____% ~~c.~~ _____%
c. Family _____% ~~d.~~ _____%
d. Genus _____% ~~e.~~ _____%
e. Species _____% ~~f.~~ _____%
~~a.f.~~ Rock name _____%

6. ~~5.~~—What percentage of the material has scientific identifications directly attached to the specimens (as opposed to written field notes, in reports, in separate catalogs, etc.)?

7. ~~6.~~—If specimens have not been identified, can you recommend a specialist who might like to work with VMNH to complete identification process?

COVERAGE – GEOPGRAPHIC or GEOLOGICAL PARAMETERS:

1. ~~1.~~—What percentage of the material is from:

a. ~~a.~~—Virginia _____% ~~b.~~ _____%
_____ %
b. Coastal or Eastern US _____% ~~c.~~ _____%
~~a.c.~~ Other US regions _____%
~~b.d.~~ Outside US _____% Where:

List major suites or stratigraphic division(s):

2. ~~2.~~—What percentage has geographic data:

a. Directly associated with the specimens? _____%
b. ONLY available in field notes? _____%
c. ALSO available in computer database? _____% Explain:

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SITE VISIT FORM (page 3 of 3)



SITE VISIT FORM — continued

DATA AND DOCUMENTATION:

1. What kind of accompanying documentation exists?

Field notes	YES	NO	
Photographs	YES	NO	
Permits	YES	NO	
Correspondence	YES	NO	
Reports	YES	NO	
Articles	YES	NO	
Other	YES	NO	Describe:

2. Could these be transferred with the specimens? YES NO
If not, why not?

SUPPLIES AND EQUIPMENT:

1. Are there any supplies that might be donated with the collection? YES NO
If yes, please describe:

2. Is there any equipment that might be donated with the collection? YES NO
If yes, please describe:

SHIPPING AND TRANSPORTATION

1. ~~1.~~ Whose responsibility would it be to transport the collection to VMNH?

2. ~~2.~~ Recommended method for transportation:

COMMENTS/SUGGESTIONS:

DEED OF GIFT

Received From:

Address:

Phone:

Donor's Tax Identification Number(s):

(Only need this if you declare a value and want a tax deduction.)

~~The~~ Specimen(s) and object(s) described below, ~~to be approved~~ that have a declared value are first processed by the ~~Director and/or Board of Trustees of the~~ Virginia Museum of Natural History ~~Foundation, an independent non-profit that does work on behalf of VMNH.~~ ~~The VMNH Foundation may then transfer said specimens/objects to the Museum, to be processed~~ in accordance with the Museum's Collections Policies.

#Items/Description	Where Collected/Found?	When Collected/Found?	Value*
--------------------	------------------------	-----------------------	--------

* It is the donor's responsibility to provide value(s) of donated property claimed as charitable deductions.

This document is subject to conditions and provisions stated on reverse.

For the Donor: _____ Date: _____
Signature

Name and Title (please print)

For the Virginia Museum _____ Date: _____
of Natural History: _____ Signature _____ Date

Name and Title (please print)

For the Donor: _____ Signature _____ Date

Name and Title (please print)

Please sign, date, and return both copies of this form, for countersignature, to:

REGISTRAR
Virginia Museum of Natural History
21 Starling Avenue
Martinsville, VA 24112

~~This document is subject to conditions and provisions stated on reverse.~~ Rev. ~~May 2012~~ July 2022
21 Starling Avenue, Martinsville, VA 24112, T. 276 634 4141 F. 276 634 4199 E. information@vmnh.virginia.gov W. www.vmnh.net

APPENDIX VIII. ~~DEED OF GIFT~~ (back of form)

**Conditions and Provisions
Regarding Gifts to The Virginia Museum of Natural History**

1. That the transfer of the item(s) noted on this document shall constitute an irrevocable and unconditional gift of same by the Donor to The Virginia Museum of Natural History, shall be subject to the terms and conditions governing the Museum's collection, and shall be subject to acceptance by the Director and/or the Board of Trustees in accordance with the Museum's Collections Policies.
2. That the transfer of these item(s) includes all rights, title, and interest in and to the above item(s) absolutely and forever.
3. That the Donor has the right to transfer said item(s), such item(s) being free and clear of all encumbrances.
4. That the item(s) described herein has/have been received by The Virginia Museum of Natural History with the understanding that the Donor is the legal owner of the item(s) at the time of acquisition by The Virginia Museum of Natural History, and that the Donor is not violating the laws of the United States or of any other nation regarding the collection, exportation, importation, sale or loan of such item(s). Should it be demonstrated otherwise, it is agreed that, at the discretion of The Virginia Museum of Natural History, the item(s) is/are to be returned, and any costs incurred by the Museum related to the proposed donation may be charged to the Donor.
5. That any information and documentation concerning the provenance of the item(s) listed herein shall be provided by the Donor to The Virginia Museum of Natural History.
6. That in accordance with the Tax Reform Act of 1984, it is the responsibility of the Donor to obtain any appraisals necessary for donated property claimed as charitable deductions. The Museum may accept your valuation of your gift for insurance purposes but may not determine value for any purpose.

APPENDIX IX. VIRGINIA FREEDOM OF INFORMATION ACT (Excerpts)

~~VIRGINIA FREEDOM OF INFORMATION ACT~~

§ 2.2-3704. Public records to be open to inspection; procedure for requesting records and responding to request; charges; transfer of records for storage, etc.

A. Except as otherwise specifically provided by law, all public records shall be open to inspection and copying by any citizens of the Commonwealth during the regular office hours of the custodian of such records. Access to such records shall not be denied to citizens of the Commonwealth, representatives of newspapers and magazines with circulation in the Commonwealth, and representatives of radio and television stations broadcasting in or into the Commonwealth. The custodian may require the requester to provide his name and legal address. The custodian of such records shall take all necessary precautions for their preservation and safekeeping.

B. A request for public records shall identify the requested records with reasonable specificity. The request need not make reference to this chapter in order to invoke the provisions of this chapter or to impose the time limits for response by a public body. Any public body that is subject to this chapter and that is the custodian of the requested records shall promptly, but in all cases within five working days of receiving a request, provide the requested records to the requester or make one of the following responses in writing:

1. The requested records are being entirely withheld because their release is prohibited by law or the custodian has exercised his discretion to withhold the records in accordance with this chapter. Such response shall identify with reasonable particularity the volume and subject matter of withheld records, and cite, as to each category of withheld records, the specific Code section that authorizes the withholding of the records.

2. The requested records are being provided in part and are being withheld in part because the release of part of the records is prohibited by law or the custodian has exercised his discretion to withhold a portion of the records in accordance with this chapter. Such response shall identify with reasonable particularity the subject matter of withheld portions, and cite, as to each category of withheld records, the specific Code section that authorizes the withholding of the records. When a portion of a requested record is withheld, the public body may delete or excise only that portion of the record to which an exemption applies and shall release the remainder of the record.

3. The requested records could not be found or do not exist. However, if the public body that received the request knows that another public body has the requested records, the response shall include contact information for the other public body.

4. It is not practically possible to provide the requested records or to determine whether they are available within the five-work-day period. Such response shall specify the conditions that make a response impossible. If the response is made within five working days, the public body shall have an additional seven work days in which to provide one of the four preceding responses.

C. Any public body may petition the appropriate court for additional time to respond to a request for records when the request is for an extraordinary volume of records or requires an extraordinarily lengthy search, and a response by the public body within the time required by this chapter will prevent the public body from meeting its operational responsibilities. Before proceeding with the petition, however, the public body shall make reasonable efforts to reach an agreement with the requester concerning the production of the records requested.

D. Subject to the provisions of subsection G, no public body shall be required to create a new record if the record does not already exist. However, a public body may abstract or summarize information under such terms and conditions as agreed between the requester and the public body.

E. Failure to respond to a request for records shall be deemed a denial of the request and shall constitute a violation of this chapter.

F. A public body may make reasonable charges not to exceed its actual cost incurred in accessing, duplicating, supplying, or searching for the requested records. No public body shall impose any extraneous, intermediary or surplus fees or expenses to recoup the general costs associated with creating or maintaining records or transacting the general business of the public body. Any duplicating fee charged by a public body shall not exceed the actual cost of duplication. The public body may also make a reasonable charge for the cost incurred in supplying records produced from a geographic information system at the request of anyone other than the owner of the land that is the subject of the request. However, such charges shall not exceed the actual cost to the public body in supplying such records, except that the public body may charge, on a pro rata per acre basis, for the cost of creating topographical maps developed by the public body, for such maps or portions thereof, which encompass a contiguous area greater than 50 acres. All charges for the supplying of requested records shall be estimated in advance at the request of the citizen.

G. Public records maintained by a public body in an electronic data processing system, computer database, or any other structured collection of data shall be made available to a requester at a reasonable cost, not to exceed the actual cost in accordance with subsection F. When electronic or other databases are combined or contain exempt and nonexempt records, the public body may provide access to the exempt records if not otherwise prohibited by law, but shall provide access to the nonexempt records as provided by this chapter.

Public bodies shall produce nonexempt records maintained in an electronic database in any tangible medium identified by the requester, including, where the public body has the capability, the option of posting the records on a website or delivering the records through an electronic mail address provided by the requester, if that medium is used by the public body in the regular course of business. No public body shall be required to produce records from an electronic database in a format not regularly used by the public body. However, the public body shall make reasonable efforts to provide records in any format under such terms and conditions as agreed between the requester and public body, including the payment of reasonable costs. The excision of exempt fields of information from a database [or the conversion of data from one available](#)

[or the conversion of data from one available](#) format to another shall not be deemed the creation, preparation or compilation of a new public record.

H. In any case where a public body determines in advance that charges for producing the requested records are likely to exceed \$200, the public body may, before continuing to process the request, require the requester to agree to payment of a deposit not to exceed the amount of the advance determination. The deposit shall be credited toward the final cost of supplying the requested records. The period within which the public body shall respond under this section shall be tolled for the amount of time that elapses between notice of the advance determination and the response of the requester.

I. Before processing a request for records, a public body may require the requester to pay any amounts owed to the public body for previous requests for records that remain unpaid 30 days or more after billing.

J. In the event a public body has transferred possession of public records to any entity, including but not limited to any other public body, for storage, maintenance, or archiving, the public body initiating the transfer of such records shall remain the custodian of such records for purposes of responding to requests for public records made pursuant to this chapter and shall be responsible for retrieving and supplying such public records to the requester. In the event a public body has transferred public records for storage, maintenance, or archiving and such transferring public body is no longer in existence, any public body that is a successor to the transferring public body shall be deemed the custodian of such records. In the event no successor entity exists, the entity in possession of the public records shall be deemed the custodian of the records for purposes of compliance with this chapter, and shall retrieve and supply such records to the requester. Nothing in this subsection shall be construed to apply to records transferred to the Library of Virginia for permanent archiving pursuant to the duties imposed by the Virginia Public Records Act (§ [42.1-76](#) et seq.). In accordance with § [42.1-79](#), the Library of Virginia shall be the custodian of such permanently archived records and shall be responsible for responding to requests for such records made pursuant to this chapter.

(1968, c. 479, § 2.1-342; 1973, c. 461; 1974, c. 332; 1975, cc. 307, 312; 1976, cc. 640, 709; 1977, c. 677; 1978, c. 810; 1979, cc. 682, 684, 686, 689; 1980, cc. 678, 754; 1981, cc. 456, 464, 466, 589; 1982, cc. 225, 449, 452, 560, 635; 1983, cc. 372, 462, 607; 1984, cc. 85, 395, 433, 513, 532; 1985, cc. 81, 155, 502, 618; 1986, cc. 273, 291, 383, 469, 592; 1987, cc. 401, 491, 581; 1988, cc. 39, 151, 395, 411, 891, 902; 1989, cc. 56, 358, 478; 1990, cc. 217, 538, 721, 819, 968; 1991, cc. 213, 561; 1992, cc. 40, 150, 167, 200, 203, 207, 593, 612; 1993, cc. 205, 270, 296, 537, 552, 638, 750, 883; 1994, cc. [485](#), [532](#), [606](#), [839](#), [853](#), [918](#); 1995, cc. [299](#), [362](#), [499](#), [562](#), [638](#), [722](#), [812](#), [837](#); 1996, cc. [168](#), [469](#), [589](#), [599](#), [783](#), [786](#), [794](#), [855](#), [862](#), [902](#), [905](#), [1001](#), [1046](#); 1997, cc. [198](#), [295](#), [439](#), [567](#), [636](#), [641](#), [777](#), [782](#), [785](#), [838](#), [861](#); 1998, cc. [427](#), [891](#); 1999, cc. [438](#), [703](#), [726](#); 2001, c. [844](#); 2002, cc. [715](#), [830](#); 2003, cc. [275](#), [981](#), [1021](#); 2007, c. [439](#); 2009, c. [626](#); 2010, c. [627](#); 2011, c. [604](#).)

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§ 2.2-3705.7. Exclusions to application of chapter; records of specific public bodies and certain other limited exemptions.

The following records are excluded from the provisions of this chapter but may be disclosed by the custodian in his discretion, except where such disclosure is prohibited by law:

1. State income, business, and estate tax returns, personal property tax returns, scholastic and confidential records held pursuant to § [58.1-3](#).
2. Working papers and correspondence of the Office of the Governor; Lieutenant Governor; the Attorney General; the members of the General Assembly, the Division of Legislative Services, or the Clerks of the House of Delegates and the Senate of Virginia; the mayor or chief executive officer of any political subdivision of the Commonwealth; or the president or other chief executive officer of any public institution of higher education in Virginia. However, no record, which is otherwise open to inspection under this chapter, shall be deemed exempt by virtue of the fact that it has been attached to or incorporated within any working paper or correspondence.

As used in this subdivision:

"Office of the Governor" means the Governor; his chief of staff, counsel, director of policy, Cabinet Secretaries, and the Assistant to the Governor for Intergovernmental Affairs; and those individuals to whom the Governor has delegated his authority pursuant to § [2.2-104](#).

"Working papers" means those records prepared by or for an above-named public official for his personal or deliberative use.

3. Library records that can be used to identify both (i) any library patron who has borrowed material from a library and (ii) the material such patron borrowed.
4. Contract cost estimates prepared for the confidential use of the Department of Transportation in awarding contracts for construction or the purchase of goods or services, and records and automated systems prepared for the Department's Bid Analysis and Monitoring Program.
5. Lists of registered owners of bonds issued by a political subdivision of the Commonwealth, whether the lists are maintained by the political subdivision itself or by a single fiduciary designated by the political subdivision.
6. Records and writings furnished by a member of the General Assembly to a meeting of a standing committee, special committee or subcommittee of his house established solely for the purpose of reviewing members' annual disclosure statements and supporting materials filed [under § 30-110 or of formulating advisory opinions to members on standards of conduct, or both](#).

7. Customer account information of a public utility affiliated with a political subdivision of the Commonwealth, including the customer's name and service address, but excluding the amount of utility service provided and the amount of money paid for such utility service.

8. Personal information, as defined in § [2.2-3801](#), (i) filed with the Virginia Housing Development Authority concerning individuals who have applied for or received loans or other housing assistance or who have applied for occupancy of or have occupied housing financed, owned or otherwise assisted by the Virginia Housing Development Authority; (ii) concerning persons participating in or persons on the waiting list for federally funded rent-assistance programs; (iii) filed with any local redevelopment and housing authority created pursuant to § [36-4](#) concerning persons participating in or persons on the waiting list for housing assistance programs funded by local governments or by any such authority; or (iv) filed with any local redevelopment and housing authority created pursuant to § [36-4](#) or any other local government agency concerning persons who have applied for occupancy or who have occupied affordable dwelling units established pursuant to § [15.2-2304](#) or [15.2-2305](#). However, access to one's own information shall not be denied.

9. Records regarding the siting of hazardous waste facilities, except as provided in § [10.1-1441](#), if disclosure of them would have a detrimental effect upon the negotiating position of a governing body or on the establishment of the terms, conditions and provisions of the siting agreement.

10. Records containing information on the site specific location of rare, threatened, endangered or otherwise imperiled plant and animal species, natural communities, caves, and significant historic and archaeological sites if, in the opinion of the public body that has the responsibility for such information, disclosure of the information would jeopardize the continued existence or the integrity of the resource. This exemption shall not apply to requests from the owner of the land upon which the resource is located.

11. Records, memoranda, working papers, graphics, video or audio tapes, production models, data and information of a proprietary nature produced by or for or collected by or for the State Lottery Department relating to matters of a specific lottery game design, development, production, operation, ticket price, prize structure, manner of selecting the winning ticket, manner of payment of prizes to holders of winning tickets, frequency of drawings or selections of winning tickets, odds of winning, advertising, or marketing, where such official records have not been publicly released, published, copyrighted or patented. Whether released, published or copyrighted, all game-related information shall be subject to public disclosure under this chapter upon the first day of sales for the specific lottery game to which it pertains.

12. Records of the Virginia Retirement System, acting pursuant to § [51.1-124.30](#), or of a local retirement system, acting pursuant to § [51.1-803](#), or of the Rector and Visitors of the University of Virginia, acting pursuant to § [23-76.1](#), or of the Virginia College Savings Plan, acting pursuant to § [23-38.77](#), relating to the acquisition, holding or disposition of a security or other ownership interest in an entity, where such security or ownership interest is not traded on a governmentally regulated securities exchange, to the extent that: (i) such records contain [confidential analysis for the Rector and Visitors of the University of](#)

Virginia, prepared by the retirement system or the Virginia College Savings Plan, or provided to the retirement system or the Virginia College Savings Plan under a promise of confidentiality, of the future value of such ownership interest or the future financial performance of the entity; and (ii) disclosure of such confidential analyses would have an adverse effect on the value of the investment to be

~~APPENDIX IX~~, Page 6 of 9

acquired, held or disposed of by the retirement system, the Rector and Visitors of the University of Virginia, or the Virginia College Savings Plan. Nothing in this subdivision shall be construed to prevent the disclosure of records relating to the identity of any investment held, the amount invested, or the present value of such investment.

13. Names and addresses of subscribers to Virginia Wildlife magazine, published by the Department of Game and Inland Fisheries, provided the individual subscriber has requested in writing that the Department not release such information.

14. Financial, medical, rehabilitative and other personal information concerning applicants for or recipients of loan funds submitted to or maintained by the Assistive Technology Loan Fund Authority under Chapter 11 (§ [51.5-53](#) et seq.) of Title 51.5.

15. Records of the Virginia Commonwealth University Health System Authority pertaining to any of the following: an individual's qualifications for or continued membership on its medical or teaching staffs; proprietary information gathered by or in the possession of the Authority from third parties pursuant to a promise of confidentiality; contract cost estimates prepared for confidential use in awarding contracts for construction or the purchase of goods or services; data, records or information of a proprietary nature produced or collected by or for the Authority or members of its medical or teaching staffs; financial statements not publicly available that may be filed with the Authority from third parties; the identity, accounts or account status of any customer of the Authority; consulting or other reports paid for by the Authority to assist the Authority in connection with its strategic planning and goals; the determination of marketing and operational strategies where disclosure of such strategies would be harmful to the competitive position of the Authority; and data, records or information of a proprietary nature produced or collected by or for employees of the Authority, other than the Authority's financial or administrative records, in the conduct of or as a result of study or research on medical, scientific, technical or scholarly issues, whether sponsored by the Authority alone or in conjunction with a governmental body or a private concern, when such data, records or information have not been publicly released, published, copyrighted or patented.

16. Records of the Department of Environmental Quality, the State Water Control Board, State Air Pollution Control Board or the Virginia Waste Management Board relating to (i) active federal environmental enforcement actions that are considered confidential under federal law and (ii) enforcement strategies, including proposed sanctions for enforcement actions. Upon request, such records shall be disclosed after a proposed sanction resulting from the investigation has been proposed to the director of the agency. This subdivision shall not be construed to prohibit the disclosure of records related

to inspection reports, notices of violation, and documents detailing the nature of any environmental contamination that may have occurred or similar documents.

17. As it pertains to any person, records related to the operation of toll facilities that identify an individual, vehicle, or travel itinerary including, but not limited to, vehicle identification data, vehicle enforcement system information; video or photographic images; Social Security or other identification numbers appearing on driver's licenses; credit card or bank account data; home addresses; phone numbers; or records of the date or time of toll facility use.

18. Records of the State Lottery Department pertaining to (i) the social security number, tax identification number, state sales tax number, home address and telephone number, personal and lottery banking account and transit numbers of a retailer, and financial information regarding the nonlottery operations of specific retail locations; and (ii) individual lottery winners, except that a winner's name, hometown, and amount won shall be disclosed.

19. Records of the Board for Branch Pilots relating to the chemical or drug testing of a person regulated by the Board, where such person has tested negative or has not been the subject of a disciplinary action by the Board for a positive test result.

20. Records, investigative notes, correspondence, and information pertaining to the planning, scheduling and performance of examinations of holder records pursuant to the Uniform Disposition of Unclaimed Property Act (§ [55-210.1](#) et seq.) prepared by or for the State Treasurer, his agents, employees or persons employed to perform an audit or examination of holder records.

21. Records of the Virginia Department of Emergency Management or a local governing body relating to citizen emergency response teams established pursuant to an ordinance of a local governing body, to the extent that such records reveal the name, address, including e-mail address, telephone or pager numbers, or operating schedule of an individual participant in the program.

22. Records of state or local park and recreation departments and local and regional park authorities to the extent such records contain information identifying a person under the age of 18 years, where the parent or legal guardian of such person has requested in writing that such information not be disclosed. However, nothing in this subdivision shall operate to prohibit the disclosure of information defined as directory information under regulations implementing the Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g, unless the public body has undertaken the parental notification and opt-out requirements provided by such regulations. Access shall not be denied to the parent, including a noncustodial parent, or guardian of such person, unless the parent's parental rights have been terminated or a court of competent jurisdiction has restricted or denied such access. For records of such persons who are emancipated, the right of access may be asserted by the subject thereof.

23. Records submitted for inclusion in the Statewide Alert Network administered by the Department of Emergency Management, to the extent that they reveal names, physical addresses, email addresses, computer or internet protocol information, telephone numbers, pager numbers, other wireless or portable communications device information, or operating schedules of individuals or agencies, where the release of such information would compromise the security of the Statewide Alert Network or individuals participating in the Statewide Alert Network.

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24. Records of the Judicial Inquiry and Review Commission made confidential by § [17.1-913](#).

25. Records of the Virginia Retirement System acting pursuant to § [51.1-124.30](#), of a local retirement system acting pursuant to § [51.1-803](#) (hereinafter collectively referred to as the

~~APPENDIX IX. Page 8 of 9~~

retirement system), or of the Virginia College Savings Plan, acting pursuant to § [23-38.77](#) relating to:

a. Internal deliberations of or decisions by the retirement system or the Virginia College Savings Plan on the pursuit of particular investment strategies, or the selection or termination of investment managers, prior to the execution of such investment strategies or the selection or termination of such managers, to the extent that disclosure of such records would have an adverse impact on the financial interest of the retirement system or the Virginia College Savings Plan; and

b. Trade secrets, as defined in the Uniform Trade Secrets Act (§ [59.1-336](#) et seq.), provided by a private entity to the retirement system or the Virginia College Savings Plan, to the extent disclosure of such records would have an adverse impact on the financial interest of the retirement system or the Virginia College Savings Plan.

For the records specified in subdivision b to be excluded from the provisions of this chapter, the entity shall make a written request to the retirement system or the Virginia College Savings Plan:

(1) Invoking such exclusion prior to or upon submission of the data or other materials for which protection from disclosure is sought;

(2) Identifying with specificity the data or other materials for which protection is sought; and

(3) Stating the reasons why protection is necessary.

The retirement system or the Virginia College Savings Plan shall determine whether the requested exclusion from disclosure meets the requirements set forth in subdivision b.

Nothing in this subdivision shall be construed to authorize the withholding of the identity or amount of any investment held or the present value and performance of all asset classes and subclasses.

26. Records of the Department of Corrections made confidential by § [53.1-233](#).

27. Records maintained by the Department of the Treasury or participants in the Local Government Investment Pool (§ [2.2-4600](#) et seq.), to the extent such records relate to information required to be provided by such participants to the Department to establish accounts in accordance with § [2.2-4602](#).

28. Personal information, as defined in § [2.2-3801](#), contained in the Veterans Care Center Resident Trust Funds concerning residents or patients of the Department of Veterans Services Care Centers, except that

access shall not be denied to the person who is the subject of the record.

APPENDIX IX. Page 9 of 9

29. Records maintained in connection with fundraising activities by the Veterans Services Foundation pursuant to § [2.2-2716](#) to the extent that such records reveal the address, electronic ~~APPENDIX IX. Page 9 of 9~~

mail address, facsimile or telephone number, social security number or other identification number appearing on a driver's license, or credit card or bank account data of identifiable donors, except that access shall not be denied to the person who is the subject of the record. Nothing in this subdivision, however, shall be construed to authorize the withholding of records relating to the amount, date, purpose, and terms of the pledge or donation or the identity of the donor. The exclusion provided by this subdivision shall not apply to protect from disclosure (i) the identities of sponsors providing grants to or contracting with the foundation for the performance of services or other work or (ii) the terms and conditions of such grants or contracts.

30. Names, physical addresses, telephone numbers, and email addresses contained in correspondence between an individual and a member of the governing body, school board, or other public body of the locality in which the individual is a resident, unless the correspondence relates to the transaction of public business. However, no record that is otherwise open to inspection under this chapter shall be deemed exempt by virtue of the fact that it has been attached to or incorporated within any such correspondence.

(1999, cc. [485](#), [518](#), [703](#), [726](#), [793](#), [849](#), [852](#), [867](#), [868](#), [881](#), § 2.1-342.01; 2000, cc. [66](#), [237](#), [382](#), [400](#), [430](#), [583](#), [589](#), [592](#), [594](#), [618](#), [632](#), [657](#), [720](#), [932](#), [933](#), [947](#), [1006](#), [1064](#); 2001, cc. [288](#), [518](#), [844](#), § [2.2-3705](#); 2002, cc. [87](#), [155](#), [242](#), [393](#), [478](#), [481](#), [499](#), [522](#), [571](#), [572](#), [633](#), [655](#), [715](#), [798](#), [830](#); 2003, cc. [274](#), [307](#), [327](#), [332](#), [358](#), [704](#), [801](#), [884](#), [891](#), [893](#), [897](#), [968](#); 2004, cc. [426](#), [690](#), [832](#); 2005, cc. [165](#), [508](#); 2007, cc. [406](#), [652](#), [660](#), [737](#), [739](#); 2008, cc. [16](#), [739](#); 2009, cc. [223](#), [827](#), [845](#); 2010, c. [300](#); 2011, cc. [827](#), [867](#); 2012, c. [726](#).)



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*Values for insurance purposes should be provided by the lender.

LENDER (signature): _____
 DATE: _____

MATERIAL RECEIVED BY: _____ DATE RECEIVED: _____
 (Signature, Printed Name and Title)

BORROWER (signature): _____ DATE RECEIVED: _____
 (condition noted above) (VMNH Staff, Printed Name & Signature)

Original signed form should be presented to the VMNH Registrar for processing.
 This document is subject to the conditions and provisions stated on reverse.

21 Starling Avenue, Martinsville, VA 24112, T. 276 634 4141 F. 276 634 4199 E. information@vmnh.virginia.gov W. www.vmnh.net Rev. ~~May 2012~~ April 2022

APPENDIX X. ~~INCOMING LOAN AGREEMENT~~ (Back of Form)

**Conditions and Provisions
 Regarding Incoming Loans to The Virginia Museum of Natural History**

All specimens (Property) loaned to The Virginia Museum of Natural History (VMNH) are subject to the following conditions and provisions. All exceptions must be requested and granted in writing.

LENGTH OF LOANS

The length for each loan will be negotiated at the time of the loan, generally not to exceed six months. Specimens may not be forwarded to another institution without written permission from lender.

SPECIMEN CARE

Specimens are to be stored according to professional standards in cases and/or facilities that are free from hazards (insects, rodents, fire, vandalism, theft, water damage, etc.).

The lender provides his/her property in good condition, and the Museum may inspect and photograph it. The Museum agrees not to alter the Property, and to report any damage or other finding to the lender. The lender certifies that the Property lent is in good condition and will withstand ordinary strains of packing, transportation, and exhibition.

The Museum will not clean, restore, reframe or otherwise alter the Property covered by this loan without the written consent of owner(s) and agreement as to costs and responsibilities for payment of same.

The Museum assumes the right, unless specifically denied by the lender, to examine the Property according to the standard curatorial practices. Unless the Museum is notified in writing to the contrary, it is understood that the Property lent may be photographed for catalogue, educational, publicity, and archival purposes connected with the exhibition, and that slides of the Property may be made for educational use. Framed work will not be unframed for photography without the consent of the lender.

SHIPPING INSTRUCTIONS/RETURN OF PROPERTY

Copies of documentation verifying legal collecting and transportation activities should be included both inside the shipping container and in an envelope on the outside of the container (examples: USFWS importation & exportation forms, collecting permits from country of origin; CITES permits, etc.).

The Museum and lender agree as to when the Property will be returned, to whom and where. The lender may not withdraw the Property from loan until the end of the loan period. Also, the Museum establishes its right to return the Property at the end of the loan period without undue difficulty, prolonged delay or extraordinary expenses; and, to limit its liabilities with regard to these factors.

The Property will be returned only to the owner, or lender, or his duly authorized agent at the address stated on the reverse unless the Museum is otherwise instructed. If the legal ownership of the Property shall change during the period of the loan, whether by reason of death, sale, insolvency, gift or otherwise, the new owner will, prior to its return, be required to establish his legal right to receive the Property by proof satisfactory to the Museum. If the location of the new owner shall be of much greater distance than the point from which the loan was borrowed, the new owner will be required to pay any difference in the charges for the delivery of the Property.

The Property shall remain in the possession of the Museum and/or the other organizations participating in an exhibition for which it has been borrowed for the time specified on the reverse, but may be withdrawn from exhibition by the Museum or any of the participating organizations with the authorization of the Museum. The Museum's right to return the Property shall accrue absolutely at the termination of the loan period.

If the Museum, after making all reasonable efforts and through no fault of its own, shall be unable to reach the lender and return the Property, then, the Museum shall have the absolute right to place the Property in storage. If, after five years, the Property shall not have been reclaimed, then, the Museum shall pursue the ownership (entirely and without restriction, further claim, or interest) of the Property, pursuant with the Code of Virginia (§§55-210.31 through 55-201.38).

APPENDIX XI. (Front of Form)



OUTGOING LOAN AGREEMENT (front of form)

OUTGOING LOAN AGREEMENT

TO:

FROM:

Virginia Museum of Natural History
21 Starling Avenue
Martinsville, VA 24112
(276) 634-4141

ATTENTION:
DIVISION:

ATTENTION:
DIVISION:

LOAN/INVOICE NUMBER:

PURPOSE OF LOAN:

DATE OF INVOICE:

_____ loan at borrower's request-education

SHIPPING INFORMATION:

_____ loan at borrower's request-research

Date: Method:

_____ loan at VMNH request—research

Insured For: _____ UPS

_____ loan at VMNH request—

exhibit

Packed By: _____ Postal – priority/airmail

_____ potential exchange

No. of Packages: _____ Postal library rate

_____ Pkgs: _____ Truck freight

potential gift

Type of Container(s): _____ Truck freight

_____ Overnight service

_____ Hand-carried

LOAN DUE DATE: _____

_____ Hand-carried

Other: _____ By: _____

LOAN APPROVED BY: _____

DATE: _____

(VMNH Staff, Printed Name and Signature)

SPECIES/ITEM DESIGNATION	SPECIMEN or CATALOG NUMBER(S)	QUANTITY AND DESCRIPTION/CONDITION	VALUE* (INSURANCE)

*Values for insurance purposes should be provided by the lender.

BORROWER

LENDER (signature): _____

DATE: _____

(VMNH Staff, Printed Name & Signature)

MATERIAL RECEIVED BY: _____ **DATE:** _____

(condition noted above) (Borrower's Signature, Printed Name and Title)

LENDER (signature): _____

DATE RECEIVED: _____

(VMNH Staff, Printed Name and Signature)

- Please sign and return both copies, for countersignature. Please return forms to the VMNH Registrar at the address below.
- For extended length loans, we would appreciate an annual update/report that includes specimen photographs and the number of programs held using these specimens, including the approximate number of people served by said programs. Please send requested information to the VMNH Registrar at the address below.

Original signed form should be presented to the VMNH Registrar for processing.

This document is subject to the conditions and provisions stated on reverse.

21 Starling Avenue, Martinsville, VA 24112, T. 276 634 4141 F. 276 634 4199 E. information@vmnh.virginia.gov W. www.vmnh.net Rev. ~~May 2012~~ April 2022

APPENDIX XI. ~~OUTGOING LOAN AGREEMENT~~ (Back of Form)

Conditions and Provisions

Regarding Outgoing Loans from The Virginia Museum of Natural History

All specimens loaned from The Virginia Museum of Natural History (VMNH) are subject to the following conditions and provisions. All exceptions must be requested and granted in writing. Failure to follow the Museum's guidelines may jeopardize future borrowing privileges.

LENGTH OF LOANS

The length for each loan will be negotiated at the time of the loan, generally not to exceed ~~six~~twelve months. Requests for extensions should be made in writing to the VMNH Registrar, two weeks to one month in advance of due date.

Specimens may not be forwarded to another institution without written permission from VMNH.

SPECIMEN CARE

Specimens should be stored according to professional standards in cases and/or facilities that are free from hazards (excess temperature, humidity or light levels, insects, rodents, fire, vandalism, theft, water damage, etc.). VMNH may recommend specific storage, display and handling guidelines for unusual or sensitive materials.

Specimens should not be repaired, sampled, dissected, remounted or in any way altered without written permission from VMNH. Special permission is required for destructive testing or reproduction of any kind.

All original documentation accompanying the specimens must never be discarded or covered over (examples include original locality labels, previous identification labels, etc.). If specimens are used in public programs, they shall be displayed with signage stating that the specimens are on loan from the Virginia Museum of Natural History.

TYPE SPECIMENS

Type specimens are loaned only from certain divisions and are subject to restrictions. All types must be returned within 30 days of receipt by registered priority mail.

Invertebrates: Types for species originating from VMNH must be returned to the Museum for deposit, even if specimens of the taxon (taxa) were previously ceded to specialists as desiderata. By prior written agreement, a portion of the type series may be retained by the specialist.

TAXONOMIC CHANGES

All material sent out on loan must be returned by the specified due date even if incorrectly identified. We would appreciate notification of taxonomic changes when material is returned.

Invertebrates: Unidentified invertebrate specimens identified by the specialist may be retained in part, as agreed to in correspondence (desiderata); major geographical localities, stages, and both sexes should be represented in series of specimens returned to VMNH.

SHIPPING INSTRUCTIONS

The specimens are the responsibility of the borrower until received by VMNH. Therefore, they should be packed and shipped according to national and international laws governing transportation, and in a manner similar to or better than as received. Wooden shipping containers must be returned to VMNH. Types must be returned by registered priority mail.

Specimens must be insured for the value indicated on the original shipping invoice. Borrower is liable for any and all damage

incurred during the period of the loan to any item borrowed from VMNH, whether caused by its agents or any third party.

Copies of documentation verifying legal collecting and transportation activities should be included both inside the shipping container and in an envelope on the outside of the container (examples: USFWS importation & exportation forms, collecting permits from country of origin; CITES permits, etc.).

PUBLICATIONS

Authors are requested to send ~~two (2) reprints~~ [electronic or physical copies](#) of any publication based in whole or in part upon material loaned from the Museum. Please mark these to the attention of the VMNH Registrar. The acronym “VMNH” should be used for citing the Museum’s specimens.



APPENDIX XIII. ~~DESTRUCTIVE ANALYSIS AGREEMENT~~



DESTRUCTIVE ANALYSIS AGREEMENT

The sample of _____ specimen (s) from the collections of the Virginia Museum of Natural History (VMNH) is provided for destructive analysis with the following conditions:

1. 1. Usable samples and unused portions of specimens will be returned to VMNH so they can be retained for future use.
2. 2. All resulting data, including raw data in the form of graphs, computer printouts, etc. pertaining to the listed specimens will be provided to the VMNH Registrar to become part of the specimen’s permanent record. Such data, except published reports, shall remain confidential for a period of two years following the close of the original loan due date. During this period, the name of the researcher may be given to others proposing to use VMNH specimens for similar research projects. In this case, the second researcher may be requested to obtain analytical results from the first researcher before the additional sampling requests may be approved.
3. 3. Methods and the extent of sampling are thoroughly documented for each specimen according to departmental guidelines.
4. 4. All costs of the analysis, including packing and shipping from and back to the Museum, are the responsibility of the researcher, unless otherwise indicated in writing.
5. Physical or electronic copies of any publication including information resulting from the analysis on the specimens will be provided to the VMNH Registrar and relevant Curator.

RESEARCHER

VIRGINIA MUSEUM OF NATURAL HISTORY

Researcher’s Signature and Date Signed

Curator’s signature and Date Signed

Researcher’s Name (printed)

Curator’s Name (printed) and VMNH Department

Researcher’s Phone Number and/or Email Address

Curator’s Phone Number and/or Email Address

Organization Name

Collections Committee Approved:

Address

YES NO

Student Advisor’s Signature and Date Signed (if applicable)

Collections Manager’s Signature and Date Signed

Student Advisor’s Name (printed), Phone # and/or Email Address
[Advisor information needed for graduate and undergraduate students.]

Collections Manager (printed name)

APPENDIX XIV.



REPRODUCTION AGREEMENT

The specimen(s) _____ from the collection of The Virginia Museum of Natural History (VMNH) is provided for reproduction with the following conditions:

1. The methods and the extent of the reproduction processes are thoroughly documented for each object/specimen according to departmental guidelines. The reproduction process will not in any way permanently alter or cause any form of destruction to the object/specimen (s), which shall be returned to VMNH in the same condition it was received.
2. Copyrights are retained by VMNH and a notice of copyright appears on or with all reproductions. The credit line, "Virginia Museum of Natural History, www.vmnh.net" must appear in caption or list of credits for each reproduction.
3. Rights to reproduce are non-exclusive and are granted for one-time use only. Reproductions may not be reused, transferred, assigned, sold or otherwise disposed without written permission from VMNH.
4. The VMNH store is the first avenue of sale and VMNH should receive a given share of all receipts, as specified under a separate contractual agreement, to be drafted as needed. Separate contractual agreement terms/conditions are additional conditions to this form.
5. All costs of the reproduction activities, including packing and shipping from and back to the Museum, are the responsibility of the researcher, unless otherwise indicated in writing.
6. Copies of all resulting electronic data (e.g., 3D scans, CT scans, other imaging), pertaining to the listed objects/specimens, will be provided to the VMNH Registrar to become part of the object/specimen's permanent record.
7. Physical or electronic copies of any publication including information resulting from the analysis on the specimens will be provided to the VMNH Registrar and relevant Curator.

RESEARCHER

VIRGINIA MUSEUM OF NATURAL HISTORY

Researcher's Signature and Date Signed

Curator's signature and Date Signed

Researcher's Name (printed)

Curator's Name (printed) and VMNH Department

Researcher's Phone Number and/or Email Address

Curator's Phone Number and/or Email Address

Organization Name

Separate Contractual Agreement Applies:

Address

YES NO
(copy attached)

Student Advisor's Signature and Date Signed (if applicable)

Collections Manager's Signature and Date Signed

Student Advisor's Name (printed), Phone # and/or Email Address
[Advisor information needed for graduate and undergraduate students.]

Collections Manager (printed name)

RESEARCHER

VIRGINIA MUSEUM OF NATURAL HISTORY

_____ Researcher's Signature and Date Signed	_____ Curator's Signature and Date Signed
_____ Researcher's Name (printed)	_____ Curator's Name (printed) and VMNH Department
_____ Researcher's Phone Number and/or Email Address	_____ Director of Research and Collections Signature/Date Signed
_____ Organization Name	_____ Director of Research and Collections (printed name)
_____ Address	_____ Collections Manager's Signature/Date Signed
_____ Student Advisor's Signature and Date Signed	_____ Collections Manager (printed name)
_____ Student Advisor's Name (printed), Phone # and/or Email Address [Advisor information needed for graduate and undergraduate students.]	

Rev. ~~May 2012~~ April 2022

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APPENDIX ~~XIV~~XV. Page 1 of 3

**APPENDIX ~~XIV~~XV. EXCERPTS FROM CODE OF VIRGINIA:
Chapter 11.2 Property Loaned to Museums**

§ 55-210.31. Definitions. As used in this chapter:

"Loaned property" means all museum property deposited on or after July 1, 2002, with a museum not accompanied by a transfer of title to the property.

"Museum" means an institution located in Virginia and operated by a nonprofit corporation or public agency whose primary purpose is educational, scientific or aesthetic, that owns, borrows or cares for, and studies, archives or exhibits museum property.

"Museum property" means all tangible objects, animate and inanimate, under a museum's care that have intrinsic value to science, history, art or culture, except for botanical or zoological specimens loaned to a museum for scientific research.

(2002, c. 883.)

§ 55-210.32. Status of loaned property; statute of limitations on recovery.

A. Except as may be otherwise provided in a written agreement between a lender and a museum, no action shall be brought against a museum to recover loaned property when more than five years have passed from (i) the receipt by the museum of written communication concerning the loaned property or (ii) any display of interest in the property by the lender as evidenced by a memorandum or other record on file prepared by an employee of the museum.

B. Loaned property shall be deemed to have been donated to the museum if no action to recover the property is initiated within one year after the museum gave notice of termination of the loan as provided in §§ 55-210.35 and 55-210.36.

C. Loaned property shall not be delivered to the Commonwealth, and shall be exempt from the provisions of Chapter 11.1 (§ 55-210.1 et seq.) of this title, but shall pass to the museum if no person takes action under Chapter 1 (§ 64.1-01 et seq.) of Title 64.1.

(2002, c. 883.)

§ 55-210.33. Notice to lenders of the provisions of this chapter.

When a museum accepts a loan of property, the museum shall inform the lender in writing of the provisions of this chapter.

(2002, c. 883.)

§ 55-210.34. Status of title to property acquired from museum.

Any person who purchases property from a museum acquires good title to the property if the museum represents that it has acquired title to the property pursuant to § 55-210.32.

(2002, c. 883.)

§ 55-210.35. Notice of termination of loan; content.

A. A museum may provide notice of termination on the museum's official Internet website, if any, or may give written notice of termination of a loan of property at any time if the property was loaned to the museum for an indefinite time. If the property was loaned to the museum for a specified term, the museum may give notice of termination of the loan at any time after the expiration of the specified term.

APPENDIX ~~xiv~~XV. Page 2 of 3

B. Notices given under this section shall contain:

1. The name and address, if known, of the lender;
2. The date of the loan;
3. The name, address, and telephone number of the appropriate office or official to be contacted at the museum for information regarding the loan; and
4. Any other information deemed necessary by the museum.

(2002, c. 883.)

§ 55-210.36. Procedure for giving notice; responsibility of owner.

A. To give notice of termination of a loan, the museum shall mail a notice to the lender at the most recent address of the lender as shown on the museum's records pertaining to the property on loan. If the museum has no address in its records, or the museum does not receive written proof

of receipt of the mailed notice within thirty days of the date the notice was mailed, the museum shall cause to be published notice at least once a week for three consecutive weeks in a newspaper of general circulation in the county or city in which the museum is located, and in a newspaper of general circulation in the county or city of the lender's last known address, if different from the county or city in which the museum is located.

B. For purposes of this section, if the loan of property was made to a branch of the museum, the museum shall be deemed to be located in the city or county where the branch is located. In all other cases, the museum shall be deemed to be located in the city or county in which its principal place of business is located.

C. The owner of property loaned to a museum shall notify the museum promptly in writing of any change of address or change in ownership of the property.

(2002, c. 883.)

§ 55-210.37. Acquiring title to undocumented property.

A. A museum shall have the authority to acquire legal title to undocumented property if the museum can verify through written records that it has held such property for five years or longer, during which period no valid claim to the property has been asserted and no person has contacted the museum regarding the property, by complying with the following procedure:

1. The museum shall cause to be published a notice once a week for two consecutive weeks in a newspaper of general circulation in the county or city in which the museum is located, and in a newspaper of general circulation in the county or city of the lender's last known address, if different from the county or city in which the museum is located. The notice shall include:
 - a. A brief and general description of the property;
 - b. The date or approximate date of the loan or acquisition of the property by the museum, if known;
 - c. Notice of the museum's intent to claim title to the property if no valid claims are made within sixty-five days following the date of the first publication of the notice under this subdivision;
 - d. The name, address and telephone number of the representative of the museum to contact for more information or to make a claim; and
 - e. If known, the name and last known address of the lender.

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2. If no valid claims have been made by the end of the sixty-five day period following the date of the first publication of the notice under subdivision 1 c of this subsection, the museum shall cause to be published a second notice once a week for two consecutive weeks in a newspaper of general circulation in the ~~county or city in which the museum is located, and in a newspaper of~~
[APPENDIX XIV. Page 3](#)

[county or city in which the museum is located, and in a newspaper of 3](#)

general circulation in the county or city of the lender's last known address, if different from the county or city in which the museum is located. The second notice shall include:

- a. A brief and general description of the property;
- b. The date or approximate date of the loan or acquisition of the property by the museum, if known;
- c. Notice that the museum claims title to the property as of the date of the end of the sixty-five day period following the date of the first publication of the notice under subdivision 1 of this subsection; and
- d. If known, the name and last known address of the lender.

B. Upon compliance with the requirements set forth in subsection A, clear and unrestricted title is transferred, as of the date specified in subdivision A 1 c of this section, to the museum and not to the Commonwealth.

(2002, c. 883.)

§ 55-210.38. Status of property loaned to or deposited with museum prior to July 1, 2002. Except as otherwise provided in a written agreement between a lender and a museum, property loaned to or deposited with a museum prior to July 1, 2002, may be discarded or transferred to another museum located in Virginia provided that (i) the notice provisions of §§ [55-210.35](#) and [55-210.36](#) have been complied with and (ii) such property is held by the museum receiving the transfer for at least three years before it sells or disposes of such property.

(2005, c. 480.)

APPENDIX ~~XV.~~ XVI.

DEACCESSION FORM



DEACCESSION FORM Deaccession Number:

Description of specimens/items proposed to be deaccessioned:

ACCESSION NO.	CATALOG NO.	SPECIES/ <u>ITEM</u>	QUANTITY AND DESCRIPTION
---------------	-------------	----------------------	--------------------------

Reason for proposed deaccession:

Are there any known restrictions or conditions on the specimens(s)?

If yes, please describe:

Attach appropriate documentation such as condition reports, letters of interest from receiving institutions, conditions for public sales, and appraisals.

Authority Requesting Action (Printed Name and Signature)	Department	Date
Collections Committee of VMNH: Deaccession of specimens recommended? YES NO		

VMNH Collections Committee Approval:

Collections Manager's Printed Name and Signature (on behalf of VMNH Collections Committee) Date

VMNH Executive Director Approval:

~~VMNH Director of Research and Collections Approval:~~

(Printed Name and Signature) Date

~~VMNH Executive Director Approval: (Printed Name and Signature) Date~~

VMNH Board of Trustees Research and Collections Committee Approval:

Committee Chair's Printed Name and Signature (on behalf of BOT R&C Committee) Date

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