Museum of Appalachia Collections Management System and Policy

Strategic Plan

2005.0.B-127 ~ Suspenders *03/25/2010*

Collection	General Bunch Cabin & Porch (B)				
Accession#	2005.0		**Category**	3: Personal Artifacts	
			Subcategory	Clothing -- Accessory	
			Othername		
Received as	Found in Collection		**Received date**	07/21/2005	
Cataloged by	Tracy Juscius		**Catalog date**	09/01/2005	
Source	Unknown				
Creditline					
Home loc	General Bunch Cabin				
Description	Suspenders				
Date			**Status date**	09/01/2005	
Year Range	0 - 0		**Status by**	Gene Purcell/Jane Kirk	
Condition	Good		**Status**	OK	
Height	0.000 in	**Width** 0.000 in	**Dim Notes**		
Length	35.000 in	**Depth** 0.000 in			
Diameter	0.000 in	**Circum** 0.000 in			
Weight	0.000 oz	**Count**			
			Related Notes		
Maint start	09/01/2005		**Maint notes**	M6 Maintenance on Textiles Cleaning (once or twice a year) 1) Check for any evidence of pests periodically through the year. (carpet beetles, clothes moths, silverfish, firebrats & mice) 2) If an infestation is detected, isolate and seal in a plastic bag. Use freezing method to eradicate pest. 3) For soiled or dusty textiles, gently brush dirt from surface with a soft brush. Then vacuum using a low suction with clean brush nozzle attachment. Use nylon screen to place between the textile and vacuum. 4) Heavily soiled textiles can be cleaned with Orvus Paste. (see instructions on jar) Test on an inconspicuous area) Consult "The Care of Antiques and Historical Collections" for any unusual maintenance questions or situations.	
Maint cycle					
Condition	Good		**Cond date**	09/01/2005	
Condition by	Gene Purcell		**Cond notes**		
Appraisor	Gene Purcell		**Acq value**		**Current value min**
App notes			**Value date**	09/01/2005	**Current value max** 15.00
Notes					

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B-127 Suspenders

Report by John W. Wallace

Prepared for the Staff and Board of the Museum of Appalachia, Clinton, Tennessee

April 6th, 2026

MIDDLE TENNESSEE STATE UNIVERSITY

History

MUSEUM OF APPALACHIA

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Project Overview

Project Background

The Museum of Appalachia (MoA) is a non-profit regional history museum located in Clinton, Anderson County, Tennessee. Founded in 1969 by cultural historian and educator John Rice Irwin, the MoA aims to "... not only to preserve the physical artifacts of an earlier time; our greater mission is to instill in the community—regionally, nationally, and internationally—a greater knowledge of and appreciation for the history & culture of the people of Southern Appalachia." MoA staff accomplish this mission through permanent exhibits, educational programming, and other initiatives that interpret the museum's 35 relocated historic structures and three exhibit buildings, which together house more than a quarter million objects predominantly tied to rural Southern Appalachian history and culture.[1]

Around 2005, MoA staff and volunteers implemented PastPerfect as the institution's dedicated collections management system (CMS) to catalog and track its collections, using it to accession objects, write condition reports, track locations, and document donor information. The system remained in use until around 2013–2014, when grant funds were exhausted and, in the absence of dedicated collections staff, the PastPerfect system became defunct. Although the object records were preserved in a compiled PDF file, the file included only stagnant object information, such as objects' locations as of 2013–2014 and initial condition reports conducted in the mid-to-late 2000s, and could not be edited, updated, or used to accession new objects.

This loss of CMS functionality created a significant institutional challenge. The PDF continues to serve as the primary method of documenting collections; however, it cannot be updated to reflect current object locations, track condition changes over time, or document condition assessment cycles. Due to the museum's large size, smaller operations team, and lack of dynamic tracking methods, the current collections management systems limit the use of objects in education programming and exhibits. Many object retrieval requests must go through the museum's curator, as non-curatorial staff lack accessible means to search for and locate objects, limiting staff's ability to fulfill the museum's interpretive mission. Furthermore, the inability to update condition reports or systematically track assessments limits the museum's ability to fulfill its preservation mission. Finally, the current collections management system

[1] Museum of Appalachia, "Our History, Philosophy, and Mission," accessed April 6, 2026, https://www.museumofappalachia.org/about-us/; Museum of Appalachia, "John Rice Irwin Obituary," 2022, https://www.museumofappalachia.org/john-rice-irwin-obituary/.

lacks sustainability, with the knowledge of object records, object location information, and the location of additional non-donor records primarily rely on the current curator, with no system in place to document such information independently of the curator.

By the early 2020s, ongoing collection growth, the PDF's limited ability to support the accession, tracking, and preservation of collections, and staff interest in more accessible collections management methods for all personnel underscored the need to reimagine the institution's approach to collections management. In Spring 2026, John Wallace, a graduate student in public history at Middle Tennessee State University (MTSU), initiated a project in collaboration with the museum curator to address this contemporary institutional challenge. Developed through a graduate seminar in museum management, the project focuses on reimagining the institution's collections management system and outlining key collections management policy sections for implementation at the Museum of Appalachia.

The following report compiles Wallace's assessment of the existing MoA's collection management system as of April 2026, findings on institutional needs and how best to address them, and recommendations for selecting a collection management software best suited to support the museum's over quarter-million object collection and the interpretive and preservation missions of the MoA. It also outlines key elements of a collections management policy document for the MoA collections and proposes a strategy for transferring object records from the existing PDF document into a new CMS.

Document Contents

The report contains the following sections to address the institutional challenge:

1) **Section 1: Assessment and Findings:** Section 1 contains an assessment of the collection management systems utilized by MoA staff as of April 6th, 2026, and their effectiveness in accomplishing the interpretive and preservation mission of the museum, and how a new collection management system and policy could more effectively support the specific needs of the institution.

2) **Section 2: Strategic Solutions:** Section 2 overviews the major proposed strategic solutions to address the stated institutional needs and identified challenges and limitations assessed in Section 1, proposing the implementation of a new CMS, developing a collection management policy, and working with local institutions to conduct periodical collection assessments and other projects.

3) **Section 3: CMS Recommendations:** Section 3 showcases two potential collection management software, highlighting their core and purchasable features, front-facing interface capabilities, pricing, pros and cons, and recommendations on which CMS best serves the needs for the Museum of Appalachia.

4) **Section 4: Collection Management Policy Recommendations:** Section 4 outlines a collection management policy document, institution-specific recommendations for developing a policy document, and methods to convert the PDF records to the new system, all following the American Alliance of Museums standards for collections stewardship.

5) **Section 5: Institutional Partnerships:** Section 5 overviews local and regional academic institutions to further establish internships and hands-on course practices to support the museum's regular documentation and maintenance of its collections, CMS, and policy.

Section 1: Assessment Findings

Section Overview

This section assesses the current methods for managing the museum's collections and records, identifies the current challenges and limitations of the current systems of management, and explores ways to implement a new CMS and collection management policy that could address these challenges. This assessment is based on on-site documentation of digital and physical methods for managing collections and in-person meetings and email correspondence with the MoA curator.

Methods

The assessment in this section is based on correspondence with the museum curator, research into current professional standards for stewarding museum collections, and an on-site assessment of the museum's collections and management practices. The process included discussions of the institution's specific needs, a tour of museum facilities, photographic documentation of representative objects, and examination of existing object records. The professional standards guiding this assessment include resources from the American Alliance of Museums, John E. Simmons's *Things Great and Small: Collection Management Policies*, and the collections management guidelines outlined in the NPS Museum Handbook.

Assessment Findings

Below are the major challenges identified in the assessment of current collection management systems at the museum:

Challenge 1: Lack of Location Tracking

The current collections management system is not capable of tracking object locations beyond those recorded in 2013–2014. As a result, knowledge of object location is largely dependent on the museum's curator, with no system in place to document or verify location information independently. This lack of tracking capabilities limits personnel's ability to efficiently retrieve objects for exhibits and educational programming, with many requests requiring curator involvement prior to retrieval. In turn, this constrains the museum's interpretive mission by slowing retrieval processes and limiting accessibility to collections for both staff and researchers.

Challenge 2: Lack of Centralized Records

While the current curator introduced a deed of gift form system in 2022, these and loan records, as well as additional research notes compiled by John Rice Irwin, all exist in separate physical and digital locations. The current collections management system lacks a centralized system to directly link relevant digital forms and records together. This limits museum personnel's ability to easily research, cross-reference, and check the status of loaned objects.

Challenge 3: Lack of Object Condition Tracking

As of the writing of this report, object condition tracking derives solely from condition reports conducted by MoA personnel in the mid-to-late 2000s. While the defunct PastPerfect system included a built-in condition assessment cycle intended for regular use, the loss of the CMS around 2013-2014 prevented its regular use. The lack of a tracking system significantly limits the museum's ability to document and monitor object conditions in support of the museum's preservation mission.

Challenge 4: Inaccessible Object Records

Currently, the object records exist in a shared drive accessible across on-site museum computers. While access to these records is not a concern, the records (operating as a CMS) are not user-friendly and rely heavily on keyword searches to locate objects. This limits museum personnel's ability to navigate these records without prior knowledge of the specific terminology used to label and describe the object. The lack of a structured, searchable system reduces the efficiency of browsing, researching, and locating objects, putting further reliance on curator assistance.

Challenge 5: Partial Object Records

The current object records are incomplete and do not fully represent the museum's collections. In a cursory survey of the object records, the author was unable to locate known objects stored in the Hall of Fame within the existing records. This limits staff and researchers' ability to locate and research objects, increasing reliance on curator assistance and reducing overall accessibility to the collections, as well as tracking object condition.

Institutional Considerations

Beyond the assessment conducted by the author, below are the institutional needs and limitations that the current curator identified when considering new approaches to collection management systems for the museum.

Consideration 1: Budget

The current curator identified the budget range as lower to middle of the road, with multiple options that represent both price ranges. Further, the curator expressed openness to both one-time-purchased licenses and subscription-based models for selecting collection management software.

Consideration 2: Grandfathering Legacy Data

The existing object records from the defunct version of PastPerfect contain a considerable amount of object metadata and condition reports that should be grandfathered into a new collection management approach. While some of the information could be further researched, expanded, and updated, the new CMS should have the ability to easily import object data from a CSV or Excel file. Furthermore, the museum's curator expressed the desire to keep the current accession numbers if possible due to the large scope of the collections.

Consideration 3: Facilities and Collections Size

The museum boasts a considerably large collection of over a quarter of a million objects, spread out across three exhibit buildings and 35 historic structures. This volume of objects and their distribution across the site further exaggerates Challenges 1 and 2. Thus, the ability to dynamically and accurately track location information needs to be a key consideration when selecting a CMS.

Consideration 4: Internal CMS Focus

The current curator emphasizes that the focus on selecting a new CMS system should be on internal functionality and user-friendliness first, but is open to considering the public-facing functionality of each CMS.

Conclusion

Overall, the lack of a modern CMS system and supporting collections management policy limits the museum's ability to efficiently engage its audiences through exhibits and programming that require accessible and well-documented collections. Despite these limitations, the museum's existing current records, documentation, and recordkeeping practices, and staff knowledge provide a very strong foundation for implementing a new collections management system and developing a formalized collections management policy. The primary goal of the strategic solutions will be to create a plan to centralize and formalize largely pre-existing practices, reintroduce functionality and accessibility to collections management, and standardize systems for CMS implementation and maintenance.

Section 2: Strategic Solutions Overview

Section Overview

This section overviews the goals the strategic solutions must accomplish, introduces the two major strategic solutions: Collection Management System reintroduction and Collection Management Policy outlining to address the challenges assessed in section 1, as well as other methods to maintain the strategic solutions in the long term: institutional partnerships. This section only introduces the solutions and how they address the challenges and considerations above, with Sections 3-5 exploring each solution in more depth.

Solution Goals

The challenges identified in the assessment and the institutional considerations outlined in Section 1 dictate the requirements for a new collections management system and the supporting collections management policy. To effectively address these needs, the new CMS and policy should support or accomplish the following:

1. **Dynamic Location Tracking:** The CMS should be capable of updating and dynamically tracking object locations and movement across the museum's exhibit and historic structures.
2. **Accessibility:** The CMS should include a user-friendly, searchable internal interface that allows staff and volunteers to efficiently locate object records. The system should be accessible to staff with minimal training, reducing reliance on the curator alone for collections knowledge.
3. **Record and Research Linking:** The CMS should allow the connection of object records with donor documentation, loan agreements, and research materials to create a more centralized system.
4. **Condition Assessment Processes:** The CMS and policy should support a regular, standardized process for documenting and monitoring object condition over time, including regular assessment cycles.
5. **Legacy Data Compatibility:** The CMS should include CSV or Excel importing compatibility to allow the grandfathering of legacy data, to allow the use of existing records, and to retain the current accessioning system.
6. **Large Collection Capacity:** The CMS can support a collection of over a quarter of a million objects.

7. **Alignment with Institutional Limitations:** The CMS and policy should align with the budget and staffing constraints of the museum.
8. **Sustainability & Maintenance:** The policy should include built-in procedures for regular review, revision, and maintenance of the policy to support long-term sustainability and prevent a repeat of the past loss of CMS functionality.

Strategic Solutions

To address these issues, the author strongly recommends pursuing three interconnected solutions to overhaul the museum's current collection management systems: 1) Reintroduce a Collection Management System, 2) Develop a Collection Management Policy and 3) Pursuing Institutional Partnerships. While the introduction of the CMS is the primary focus of the plan, a collections management policy and institutional partnerships serve as maintenance strategies to ensure the continued effectiveness and sustainability of the CMS.

Solution 1: Reintroduce a Collection Management System

Proposed Strategy

Purchase a license or subscription to a contemporary CMS that is compatible with existing legacy data, supports dynamic location tracking, links donor and loan records, and can accommodate the museum's large collection. Develop a policy, as addressed in the next section, to properly establish standards and guidelines to utilize the new CMS, and train staff, volunteers, and interns on the basic functions of the CMS, such as searching object records, accessioning and deaccessioning objects, linking records, and using basic system features.

How it Addresses Institutional Challenges

A well-maintained and dynamic CMS will address challenges related to tracking object locations, centralizing records, monitoring object conditions, and improving overall accessibility. A new CMS supports the museum's interpretive mission by allowing a wider range of staff and volunteers to efficiently use collections for exhibits, educational programs, and research. A new CMS also supports the preservation mission by enabling regular condition assessments and accurate tracking of object locations.

By implementing a new CMS, the museum reduces reliance on the curator alone for retrieval, research, and condition assessments. Thus, a new CMS would enable a more structured and accessible approach to collections management, enabling more museum personnel to support the curator in collections management.

Short-term Goals

- Select and purchase a license or subscription to a contemporary CMS that meets the requirements established in Solution Goals.
- Import legacy data into the new CMS while maintaining current accession numbers.
- Train staff and volunteers to use the CMS for basic recordkeeping and retrieval.
- Update object location notes and conduct condition assessment reports to update out-of-date object information.

Long-term Goals

- Maintain up-to-date, searchable records accessible to staff and researchers.
- Enable ongoing monitoring of object conditions through regular assessment cycles.
- Support future expansion, including potential public access modules.

NOTE: For an in-depth breakdown of selecting an appropriate CMS option, please view Section 3 of this report.

Solution 2: Develop a Collection Management Policy

Proposed Strategy

A formal policy establishes standardized procedures, clarifies responsibilities, and ensures consistent practices in collections stewardship. It further gives guidelines and establishes systems to continuously and accurately maintain collection condition assessments, documentation, and, in general, operational consistency.

How it Addresses Institutional Challenges

A clear and well-defined collections management policy will address challenges related to incomplete documentation, lack of systems for object condition assessments, and limited staffing in collections management. A formal policy supports the interpretive mission by providing consistent guidelines for the use of collections and ensuring existing collections and new acquisitions align with the interpretive

scope of the museum, and thus more effectively support education programs and exhibits. A formal policy also supports the preservation mission by establishing procedures and guidelines for documentation for object condition assessment, location tracking, and collections care.

A collections management policy enables a structured and consistent approach to collections management, allowing a wider range of museum personnel to support the curator in collections management. It also aids museum staff in integrating the new CMS into everyday museum use, serving as training material for museum personnel.

Short-term Goals

- Draft, review, and approve an initial collections management policy geared specifically to the chosen CMS and based on professional standards.
- Produce and train museum personnel in consistent procedures for basic collections management, such as accessioning and deaccessioning collections, conducting condition assessments, linking and adding new forms and records.
- Clearly define roles and responsibilities in collection management.

Long-term Goals

- Establish a regular policy review process and implement updates to ensure it aligns with professional standards and institutional needs.
- Create a sustainable system for volunteer and institutional partnership (as addressed in solution 3), participation in supporting collections management.

NOTE: For an in-depth outline of an appropriate Collections Management Policy, please view Section 4 of this report.

Solution 3: Establish Institutional Partnerships

Proposed Strategy

Establish partnerships with local, regional, and state academic institutions with programs in museum studies, archival management, conservation, and related fields. Doing so can allow for regular, structured opportunities for internships, practicum experiences, and project-based work to support the MoA staff in collection management work and projects, such as periodical condition assessments, cataloging, records management, and interpretive projects.

How it Addresses Institutional Challenges

Partnerships with local and regional academic institutions will address challenges related to limited curatorial staffing and the need for specialized knowledge in collections management and preservation. These partnerships support the museum's interpretive mission by expanding opportunities for collections-based research and knowledge, and ways to use collections for programming. These partnerships also support the preservation mission by enabling large-scale projects such as condition assessments, cataloging, and documentation through student-led support.

By supporting these partnerships with academic institutions and organizations, the museums can help support the limited staff capacity with students and emerging professionals. Thus, these partnerships enable a more sustainable approach to collections management and preservation. These partnerships can help maintain the new CMS system and policy.

Short-term Goals

- Identify and establish relationships with potential partner institutions with appropriate programs tied to museums, collections, and preservation work.
- Identify and develop internships and practicum projects to support MoA staff in collections management based on the immediate needs of the museum.

Long-term Goals

- Maintain ongoing partnerships to support periodic condition assessments, accessioning collections into the CMS, and other projects.
- Establish a consistent pipeline of student and professional support to sustain the CMS and policy.

NOTE: For an in-depth overview of appropriate partnership institutions and types of projects, please view Section 5 of this report.

Section 3: Collection Management System (CMS) Recommendations

Section Overview

This section provides options for Collection Management Systems (CMS), lists the pros and cons of each option, and finishes with the recommended software by the author of this report.

Methods

To select effective CMS options, the author drew from professional best practices, including resources from the American Alliance of Museums and John E. Simmons's guidebook *Things Great and Small: Collection Management Policies*, as well as surveying product websites and professional discussions of the collections management systems evaluated. Many decisions and inclusions were based on the specific institutional context of the Museum of Appalachia, particularly the limited staff, lower-to-mid-cost range, and other aspects addressed in Assessment Findings and Institutional Considerations identified in Section 1, and accomplish the Solution Goals identified in Section 2.

Collection Management System Software Options

The author identified the collection management systems below as the strongest candidates in terms of how effectively they address the challenges and considerations of the institution.

Option 1: PastPerfect 5.0

Overview

PastPerfect 5.0 is primarily designed for and used by small and mid-sized institutions. It is a downloadable desktop program purchased as a one-time license, with additional add-ons being added to the total one-time license purchase. It can connect to PastPerfect Online as a public interface, which is a purchasable add-on to the base system.

Features

- ➔ Object cataloging
- ➔ Accession, donor, and contact records linking
- ➔ Object location tracking
- ➔ Object condition notes[2]

Recommended Paid Add-Ons

- ➔ ***Multi-Media Upgrade:*** $385 additional one-time cost / $308 for AASLH members
  - ◆ *NOTE: Enables the ability to link object photographs to object records*
- ➔ ***Network Upgrade (2-5 Users):*** $515 additional cost / $412 for AASLH members
  - ◆ *NOTE: Only pursue this add-on if you want the CMS to be accessible from multiple local machines.*[3]

Technical Requirements

- ➔ **For a Single User:** only a single machine with a local installation of the software is required. Storage of data is tied to local machine storage. This ties the collection capacity to the storage limitations to the machine.
- ➔ **For Multiple Users:** A local server or shared network drive is needed to host the software and handle storage, and allows simultaneous access of the CMS from multiple machines.
  - ◆ *NOTE: This option would likely warrant IT staff training to help with setup and any future connectivity issues.*[4]

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[2] PastPerfect Software, Inc., "PastPerfect 5.0," accessed April 6, 2026, https://museumsoftware.com/pp5.html; Canadian Heritage Information Network, "PastPerfect Museum Software Version 5.0 Profile," last modified December 10, 2018, https://www.canada.ca/en/heritage-information-network/services/collections-management-systems/collections-management-software-vendor-profiles/pastperfect-museum-software-version-5-0-profile.html.
[3] PastPerfect Software, Inc., "Pricing," accessed April 6, 2026, https://museumsoftware.com/pricing.html.
[4] PastPerfect Software, Inc., "Compare PastPerfect Version 5.0 and Web Edition," accessed April 6, 2026, https://museumsoftware.com/compare.html; PastPerfect Software, Inc., "PastPerfect 5.0."

Purchase Information

- ➔ **Type:** One-time license purchase.
- ➔ **Basic Without add-ons:** $870 standard / $696 for AASLH members.
- ➔ **Basic and MultiMedia Add-on:** $1,255 standard / $1,004 for AASLH members.
- ➔ **Basic and MultiMedia and Network Upgrade Add-Ons:** $1,770 standard / $1,416 for AASLH members.[5]

Public Access

A public-facing interface is available through PastPerfect Online, an optional vendor-hosted add-on that can be added to the base license or later added on. It creates a searchable online database connected to PastPerfect 5.0 records.[6]

Cost:

- ➔ ***Set Up:*** $285 standard / $228 for AASLH members
- ➔ ***Annual Hosting:*** $475 for the first 10,000 records, $245 for each additional 10,000 records.
  - ◆ *NOTE: With the estimated 250,000 objects collection, and assuming all collections became publically available, the annual cost comes to $6,355.*[7]

Pros

- ➔ **One-Time Purchase:** Ensures the museum retains control of object records regardless of budget insecurity, lacking annual fees beyond the one-time purchase. This perpetual ownership of the CMS ensures long-term sustainability.[8]
- ➔ **Grant-Friendly:** The one-time purchase model makes writing a grant to fund the purchase of a CMS easier by framing it as a singular project cost that improves collections care. Further, a one-time grant is generally easier to acquire than securing repeated grants to sustain ongoing CMS subscription costs.
- ➔ **Local Data Control:** The object record data is controlled by the museum in a local machine, so the museum manages backups and retains offline access.[9]

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[5] PastPerfect Software, Inc., “Pricing.”
[6] PastPerfect Software, Inc., “PastPerfect Online,” accessed April 6, 2026, https://museumsoftware.com/pastperfectonline.html.
[7] PastPerfect Software, Inc., “Pricing.”
[8] PastPerfect Software, Inc., “Compare PastPerfect Version 5.0 and Web Edition.”
[9] PastPerfect Software, Inc., “Compare PastPerfect Version 5.0 and Web Edition.”

- ➔ **Large Collection Capability:** Can handle more than 3 million catalog records, with the only limitations to capacity being the storage capacity of local devices.[10]
- ➔ **Institutional Familiarity:** Due to the museum's past experience with PastPerfect and the stagnant object records being based on PastPerfect data types, implementation will be comparatively simpler.
- ➔ **Record and Research Linking:** The contact management capabilities and multimedia add-on allow for centralization of object records, deed of gift and loan forms, and research files.[11]
- ➔ **Location and Condition Assessment System:** Includes unlimited updates to object location and condition notes.[12]
- ➔ **Importing Legacy Data Capabilities:** Includes CSV or Excel file importing capabilities. If the object records PDF can be transferred into an appropriate file type, it can be directly imported into the CMS to become dynamic records.[13]

Cons

- ➔ **Single Access:** Without paid add-ons, access to the CMS is limited to a single machine, limiting accessibility to the CMS at a given time.[14]
- ➔ **Some IT Assistance:** Especially if the museum purchases the multi-user add-on, installation, LAN set-up, and access will likely require contracted IT support. Some reviews recommend that set up and troubleshooting is made easier with the annual support add-on for the first year, which is an additional up-front cost for one year of support.[15]
    - ◆ First Year Annual Support (Single user:) $345 / $276 for AASLH members
    - ◆ First Year Annual Support (Network): $425 / $340 for AASLH members
- ➔ **Paid Image and Record Integration:** Connecting images and forms to object records is not included in the basic license, requiring the paid MultiMedia Upgrade.[16]
- ➔ **Dated Interface:** Compared to modern web-based CMSs, the interface for PastPerfect is considered dated, limiting the accessibility and efficiency of collections work without training.[17]

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[10] PastPerfect Software, Inc., *PastPerfect 5.0 Users' Guide*, "What's New in Version 5.0," accessed April 6, 2026, https://museumsoftware.com/WebHelp/index.htm#t=Chapters%2FPP5-1e.html.
[11] PastPerfect Software, Inc., "PastPerfect 5.0."
[12] Canadian Heritage Information Network, "PastPerfect Museum Software Version 5.0 Profile."
[13] PastPerfect Software, Inc., "Frequently Asked Questions," accessed April 6, 2026, https://museumsoftware.com/faq.html.
[14] PastPerfect Software, Inc., "Pricing."
[15] American Alliance of Museums, "Past Perfect AAM Open Forum," posted June 7, 2021, https://community.aam-us.org/communities/community-home/digestviewer/viewthread?GroupId=31&MessageKey=ea246ec5-22c2-4842-a6b0-8d5d7035f274; PastPerfect Software, Inc., "Pricing."
[16] PastPerfect Software, Inc., "Pricing."
[17] David Bellm, "Collection Management in the Digital Age: Making the Right Choice," *Illinois Association of Museums Blogs*, September 26, 2025, https://www.illinoismuseums.org/Blogs/13546474.

Conclusion

PastPerfect 5.0 is a solid, grant-friendly solution that allows the centralization of object, donor, and accession records, as well as supporting condition and location tracking. With the Multi-Media and Network add-ons, this CMS allows multiple staff to access and digitally manage collections, reducing sole reliance on the curator. It's a one-time purchase that ensures long-term control of CMS functionality; however, multi-user setup and backups require some IT support, and potentially paid PastPerfect IT support services. Overall, PastPerfect 5.0 addresses the core challenges and institutional considerations explored in Section 1 and the Solution Goals in Section 2, and would be a strong fit for the Museum of Appalachia.

Option 2: PastPerfect Web Edition

Overview

PastPerfect Web Edition is the cloud-based, web-accessible version of PastPerfect, designed for small and mid-sized institutions but with a browser-based CMS rather than a locally installed desktop program. It is sold as an annual subscription that includes hosting, backups, and technical support. Like PastPerfect 5.0, it can connect to PastPerfect Online as a public interface, which is a purchasable add-on to the base subscription.

Features

- ➔ Object cataloging
- ➔ Accession, donor, and contact records linking
- ➔ Object location tracking
- ➔ Object condition notes
- ➔ Multimedia integration

Technical Requirements

- ➔ Web-based access with multi-user capability, thus, the only technical requirement is as local machines the museum personnel need access to.

Purchase Information

- ➔ **Type:** Annual subscription, with different packages
- ➔ **Packages:**
  - ◆ ***Starter Package***
    - 1 User
    - 5,000 Records
    - 100 GB Storage
    - Public Access optional
  - ◆ ***Full Package***
    - 10 Users
    - Unlimited Records
    - 100 GB Storage
    - Public Access optional
  - ◆ ***XL Package***
    - 20 Users
    - Unlimited Records
    - 1,000 GB Storage
    - Public Access optional
  - ◆ ***2XL Package***
    - 40 Users
    - Unlimited Records
    - 3,000 GB Storage
    - Public Access optional

- ➔ **One-Time Setup and Licensing**
  - ◆ ***Starter Package:*** $375 / $300 for AASLH members
  - ◆ ***Full/XL/2XL Package:*** $1245 / $996 for AASLH members

- ➔ **Annual Hosting and Support**
  - ◆ ***Starter Package:*** $745 / $596 for AASLH members
  - ◆ ***Full Package:*** $870 / $696 for AASLH members
  - ◆ ***XL Package:*** $1245 / $996 for AASLH members
  - ◆ ***2XL Package:*** $2245 / $1796 for AASLH members[18]

[18] PastPerfect Software, Inc., "PastPerfect Web Edition," accessed April 6, 2026, https://museumsoftware.com/webedition.html.

Public Access

A public-facing interface is available through PastPerfect Online, an optional vendor-hosted add-on that can be added to the base license or later added on. It creates a searchable online database connected to selected object records.[19]

Cost: The cost of the public access depends on the subscription type (or package) of the internal PastPerfect system, as shown in the "Purchase Information" section.

- ➔ ***Public Access for Starter Package:*** $250 / $200 for AASLH members
- ➔ ***Public Access for Full Package:*** $375 /$300 for AASLH members
- ➔ ***Public Access for XL Package:*** $750 / $600 for AASLH members
- ➔ ***Public Access for 2XL Package:*** $1500 / $1200 for AASLH members[20]

Pros

- ➔ **Cloud-Based:** No local server or complex IT support needed, with updates and backups automatically handled by the vendor. Greatly reduces reliance on local hardware and in-house IT support.[21]
- ➔ **Remote Access:** Accessible via a web browser, allowing for collections management work from multiple locations, and with a multi-user package, simultaneously across multiple machines.[22]
- ➔ **Institutional Familiarity:** Due to the museum's past experience with PastPerfect and the stagnant object records being based on PastPerfect data types, implementation will be comparatively simpler.[23]
- ➔ **Record and Research Linking:** The contact management capabilities and multimedia files allow for centralization of object records, deeds of gift and loan forms, and research files.
- ➔ **Location and Condition Assessment System:** Includes unlimited updates to object location and condition notes.[24]
- ➔ **Importing Legacy Data Capabilities:** Includes CSV or Excel file importing capabilities. If the object records PDF can be transferred into an appropriate file type, it can be directly imported into the CMS to become dynamic records.[25]

[19] PastPerfect Software, Inc., "PastPerfect Online."
[20] PastPerfect Software, Inc., "Compare PastPerfect Version 5.0 and Web Edition."
[21] PastPerfect Software, Inc., "PastPerfect Web Edition."
[22] PastPerfect Software, Inc., "PastPerfect Web Edition."
[23] PastPerfect Software, Inc., "Frequently Asked Questions."
[24] PastPerfect Software, Inc., "Condition," accessed April 6, 2026, https://museumsoftware.com/we/collections_condition.htm.
[25] PastPerfect Software, Inc., "Frequently Asked Questions."

- ➔ **Large Collection Capability:** Can handle a large collection, with the only limitations to capacity being the storage capacity of the selected package.[26]
- ➔ **Institutional Familiarity:** Due to the museum's past experience with PastPerfect and the stagnant object records being based on PastPerfect data types, implementation will be comparatively simpler.

Cons

- ➔ **Annual Subscription Cost:** Requires ongoing payment, which can be higher over time compared to a one-time desktop purchase, depending on the length of the subscription and the type of package. If grant funds become the primary source for maintenance, this may be an unsustainable option, risking the CMS becoming defunct.
- ➔ **External Data Control:** Relies on vendor hosting, thus access to editing object data depends on maintaining the subscription, so the museum does not control the data in the same way it would with a local installation. Beyond manual backups conducted by museum personnel, if the subscription expires, access to the object records cease and can only be accessed again through renewal of the subscription.[27]
- ➔ **Paid Public Interface:** Public access is not included in the base subscription, with cost dependent on the selected package.
- ➔ **No Offline Access:** Full access requires a strong internet connection and a stable web browser, limiting access to object records when offline or with unstable network connections.[28]

Conclusion

PastPerfect Web Edition is a more flexible, cloud-based solution that allows the centralization of object, donor, and accession records, while supporting condition and location tracking across multiple users and locations. Its multi-user capabilities and reduced IT requirements allow staff and volunteers to engage directly with collections management, reducing sole reliance on the curator. However, its subscription-based model introduces ongoing costs and reliance on vendor hosting of object records, which may present long-term sustainability concerns depending on funding stability. Overall, PastPerfect Web Edition addresses the core challenges and institutional considerations explored in Section 1 and the Solution Goals in Section 2, and would be a strong fit for the Museum of Appalachia if consistent funding for annual subscription costs can be secured and maintained.

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[26] PastPerfect Software, Inc., "PastPerfect Web Edition."
[27] PastPerfect Software, Inc., *PastPerfect Web Edition Terms of Service*, updated December 17, 2019, https://museumsoftware.com/download/ppwedocs/termsofservice.pdf.
[28] PastPerfect Software, Inc., "Frequently Asked Questions."

Option 3: CatalogIt

Overview

CatalogIt is a web-based collections management system designed for small and mid-sized institutions and is accessible through both web browsers and mobile devices. It is sold as an annual or monthly subscription, including hosting, backups, and technical support. It can connect to CatalogIt HUB, a public interface included in all subscriptions.

Features

- ➔ Object cataloging
- ➔ Accession and donor record linking
- ➔ Object photographs and Multi-media integration (included)
- ➔ Object location tracking
- ➔ Object condition notes
- ➔ Cloud-based record storage[29]

Technical Requirements

- ➔ Fully cloud-based with no local software required, with storage and backups managed by the vendor.
- ➔ Web browser or mobile app to access object records and collection management functions.[30]

Public Access

- ➔ Includes CatalogIt HUB, a built-in vendor-hosted public interface that allows institutions to publish selected records online.[31]

[29] CatalogIt, "CatalogIt: Powerful, Intuitive Museum & Private Collections Management," accessed April 6, 2026, https://www.catalogit.app/.
[30] CatalogIt, "Museum Collections Management App," accessed April 6, 2026, https://www.catalogit.app/products/museum.
[31] CatalogIt, "Publishing to the HUB," updated November 26, 2025, https://support.catalogit.app/en_US/publishing/publishing-to-the-hub.

Purchase Information

- ➔ **Type:** Annual subscription, with different packages
- ➔ **Packages:**
  - ◆ ***Museum Free:***
    - 1 User
    - 50 entries
    - 5 GB storage
    - No HUB interface
  - ◆ ***Museum Small:***
    - 10 Users
    - 25,000 entries
    - 100 GB storage
    - HUB interface
  - ◆ ***Museum Medium:***
    - 10 Users
    - 50,000 entries
    - 150 GB storage
    - HUB interface
  - ◆ ***Museum Large:***
    - 10 Users
    - 100,000 entries
    - 200 GB storage
    - HUB interface

- ➔ **Subscription Pricing**
  - ◆ ***Small:*** $540 annually / $54 monthly
  - ◆ ***Medium:*** $720 annually / $72 monthly
  - ◆ ***Large:*** $960 annually / $96 monthly

- ➔ **Addons**
  - ◆ ***100GB Additional Storage:*** $100 annually / $10 monthly
  - ◆ ***Additional User:*** $80 annually / $8 monthly[32]

[32] CatalogIt, “Pricing,” accessed April 6, 2026, https://www.catalogit.app/pricing.

Pros

- ➔ **Cloud-Based:** No local server or complex IT support needed, with updates and backups automatically handled by the vendor. Greatly reduces reliance on local hardware and in-house IT support. CatalogIT also includes a dedicated IT support system with documentation, tutorials, and CatalogIT team assistance.[33]
- ➔ **Remote Access:** Accessible via a web browser and mobile app, allowing for collections management work from multiple locations and in exhibit locations, and with multi-user subscriptions, simultaneous use across multiple machines.[34]
- ➔ **Record and Research Linking:** The contact management capabilities and document attachment tools allow for centralization of object records, donor documentation, loan forms, and research files.[35]
- ➔ **Location and Condition Assessment System:** Includes capabilities to update object location and condition histories, with condition reports, conservation notes, and linked images or documents.[36]
- ➔ **Importing Legacy Data Capabilities:** Includes CSV or Excel file importing capabilities. If the object records PDF can be transferred into an appropriate file type, it can be directly imported into the CMS to become dynamic records.[37]
- ➔ **Ease of Use:** CatalogIt is repeatedly reported by users as accessible, easy to train, and overall easy to use, minimizing the training needed for personnel use.[38]
- ➔ **Wholistic Subscriptions:** Basic collection management features, multi-media capabilities, hosting, and public access are included in the basic subscription.[39]
- ➔ **Object Record Safetynet:** If the subscription expires, records are not deleted or withheld. Instead, records remain viewable through read-only mode.[40]

Cons

- ➔ **Annual Subscription Cost:** Requires ongoing payment, which can be higher over time compared to a one-time desktop purchase, depending on the length of the subscription and the

[33] CatalogIt, “Support,” CatalogIt Support, accessed April 6, 2026, https://support.catalogit.app/.
[34] CatalogIt, “App”; American Alliance of Museums, “Collections Software AAM Open Forum,” posted June 4, 2024, accessed April 6, 2026, https://community.aam-us.org/discussion/collections-software.
[35] CatalogIt, “App.”
[36] CatalogIt, “App.”
[37] CatalogIt, “Importing Data,” July 18, 2025, https://support.catalogit.app/importing-data.
[38] Software Advice, “CatalogIt Reviews,” *Software Advice*, accessed April 6, 2026, https://www.softwareadvice.com/cms/catalogit-profile/reviews/.
[39] CatalogIt, “App”; CatalogIt, “Publishing.”
[40] CatalogIt, “FAQ,”January 22, 2026, https://support.catalogit.app/faq.

type of package. If grant funds become the primary source for maintenance, this may be an unsustainable option, risking the CMS becoming defunct.[41]

- ➔ **Large Collection Capacity:** The museum subscriptions have a 100,000 entry limit, so the standard subscriptions cannot fully support the museum's entire quarter-million object collection. Thus, museum staff would have to purposefully select what objects to include in the CMS, likely having to prioritize exhibit halls and key interpreted collections.[42]
- ➔ **External Data Control:** The object records are held by the hosting vendor. If the subscription ends, the records become read-only but remain with the vendor.[43]
- ➔ **No Offline Access:** Full access requires a stable internet connection and browser access, limiting use when offline or with unstable network conditions.

Conclusions

CatalogIt is a highly accessible, cloud-based solution that allows the centralization of object, donor, and accession records, while supporting condition and location tracking across multiple users and devices. Its ease of use, built-in public access, and relatively low annual cost compared to systems like PastPerfect Web Edition make it a strong option for institutions with limited IT capacity and a need for immediate usability. However, its subscription-based model introduces ongoing costs and reliance on vendor hosting. Critically, its 100,000 record limit prevents it from fully supporting the full MoA collections of over a quarter of a million objects without significant limitations on what objects are included in the CMS. Overall, while CatalogIt is strong in accessibility and cost-efficiency, its limitations in collection capacity make it a less viable long-term solution for the Museum of Appalachia if the priority is full collection documentation.

[41] CatalogIt, "Pricing."
[42] CatalogIt, "Comparing Plan Types," February 9, 2026, https://support.catalogit.app/accounts-subscriptions/comparing-plan-types.
[43] CatalogIt, "FAQ."

Section 4: Collection Management Policy Recommendations

Section Overview

This section provides an outline for a collections management policy for the MoA's collections, identifying key sections and incorporating institution-specific recommendations, including strategies for integrating legacy metadata from the PastPerfect PDF into a new collections management system. The author will continue working with MoA staff to refine the outline into a fully usable Collection Management policy.

Methods

To provide an effective outline for a collection management policy, the author draws from the framework provided by American Alliance of Museums's "Collections Management Policy" guidelines within their Ethics, Standards, and Professional Practices recommendations and their *Developing a Collections Management Policy Alliance Reference Guide* and John E. Simmons's book *Things Great and Small: Collections Management Policies*. While AAM materials broadly dictated sections and format, Simmons's work was utilized to expand definitions and model policy text.

Due to the scope of this project, the need for multiple staff with intimate knowledge of institutional operations and contexts to develop a full policy, and the ongoing nature of CMS selection, this section only outlines, provides example verbiage, and defines the key components of a collections management policy rather than presenting a fully developed policy document. Thus, the outline is in no way a full proposed policy document. Each section of the policy is meant to give institution-specific recommendations to support future development and implementation of a full policy. The outline is structured by core elements recommended by the American Alliance of Museums, supplemented by relevant components from John E. Simmons's framework.

Collections Management Policy Outline

Below is an outline for a collections management policy document for the MoA's collections. This overview includes the major sections particularly relevant to the MoA and the strategic plan project. The author does not include all sections nor does he include examples for all sections.

The primary focus is on Section 1: Introduction and Administration Policies, Section 2: Scope and Categories of Collections, and Section 3: Acquisitions, Accessions, and Cataloging, due to their heightened relevance to the immediate needs of implementing a CMS as well as being sections that inform the sections following. The outline is meant to introduce key sections and concepts in a collections management policy, and should be further developed to fit the specific needs of the MoA. The outline also lacks some structural aspects of the document, such as a table of contents or source sections.

A collection management policy document should broadly include the following major sections and content:

Section 1: Introduction and Administration Policies

Subsection 1: Policy Creation, Review, and Revision

- ***Creation Date:*** List the date when the collections management policy document is first approved by all interested parties and implemented by the institution. The creation date serves as a record of when the policy first came into effect.
    - EX: Front Page, below the title:
        - Created April 2026

- ***Review/Revision Date:*** List the date of whenever the policy is reviewed, revised, or added to and subsequently approved by all interested parties. The Review/Revision date serves as a record of when the document was last maintained, as well as encouraging regular upkeep and review of the document so it is kept up-to-date.[44]
    - EX: Front Page, below the “Created” date:
        - Last Reviewed/Revised March 2027

Subsection 2: Statement of Purpose

- Include a purpose statement for the collection management policy, which states the purpose of the policy. Because the MoA wishes to develop a collection management system that is accessible to staff and volunteers of all levels, the author recommends a purpose statement that reflects the specific goals of the policy:

[44] American Alliance of Museums, *Developing a Collections Management Policy Reference Guide*, 2012, accessed April 6, 2026, https://www.aam-us.org/wp-content/uploads/2018/01/developing-a-cmp-final.pdf, 7.

- EX: “The Collections Management Policy establishes guidelines for all staff and volunteers in the management of the Museum of Appalachia’s collections and historic structures. The policy supports the museum’s interpretive and preservation missions by defining responsibilities and procedures for collections stewardship, including processes for acquisition and deaccession, documentation, loans, care, and access to museum collections.” [45]

Subsection 3: Statement of Institutional Mission

- Include the museum’s interpretive and preservation missions. Because all policies and procedures should align with the museum’s missions, having a clear record ensures that collections management decisions support the museum’s goals.

    - EX: “The Museum of Appalachia seeks not only to preserve the physical artifacts of an earlier time; our greater mission is to instill in the community— regionally, nationally, and internationally—a greater knowledge of and appreciation for the history & culture of the people of Southern Appalachia.”[46]

Subsection 4: Statement of Authority

- Include a statement to establish who develops, changes, and approves the collections management policy, creating a clear structure of responsible designations and processes for review, revision, and approval within the museum, and creating systems for accountability for maintaining the document.

    - EX: “The museum curator is responsible for drafting and proposing changes to the Collections Management Policy, as well as coordinating and supervising such work with appropriate staff, volunteers, and consultants. All proposed revisions shall be reviewed by the museum president and the executive assistant and require approval by the Board of Directors before being implemented by museum staff. All changes to the policy must follow this review and approval process.”[47]

[45] John E. Simmons, *Things Great and Small: Collections Management Policies*, 2nd ed. (Lanham, MD: Rowman & Littlefield, 2017), 26-27.
[46] Simmons, *Things Great and Small*, 23; Museum of Appalachia, “Our History.”
[47] Simmons, *Things Great and Small*, 33-34.

Subsection 5: Document Contents

- Provide a brief overview of the major sections of the policy document, describing their contents. This section will help volunteers and staff navigate to only the relevant sections when working with the collections.

Section 2: Scope and Categories of Collections

Subsection 1: Statement of Scope

- State the geographic/thematic/chronological/ETC scopes of the museum's collections. This commonly includes the collections' strengths, use of the collections, and collecting philosophy, or what informs future collecting and development. More robust Scope and Categories sections include a history of the collections and collecting practices, collections' weaknesses, governing authority of collections, or what the museum does *not* collect.

  The statement of scope should be guided by the goals and priorities of the Museum of Appalachia's staff and leadership for both current operations and future development of preservation and interpretive missions. The examples below are just a few of the many ways a museum can define and target its scope of collections.[48]

  - ***EX 1:*** "The Museum of Appalachia collects, preserves, and interprets artifacts, historic structures, and oral histories related to the history, culture, and everyday life of communities within the geographic Southern Appalachian region. The collection spans from the mid-18th century to the present and includes materials from rural, mountainous, lowland, and select urban contexts as defined by the museum's interpretive mission. Collections emphasize folklife, labor, vernacular craft traditions, music, and storytelling, documenting diverse cultural experiences and regional change over time."

- *NOTE: The Museum of Appalachia would benefit from clearly defining "Appalachia," both internally and for the public. Considerations include whether the definition is cultural, geographic, economic, or some combination; whether it includes only rural mountainous areas or also lowland and urban regions; and whether it includes communities of color. A clear and consistent definition will allow for far more targeted acquisitions and give the museum the ability to decline donations that do not align with the museum's scope.*

[48] Simmons, *Things Great and Small*, 37.

Subsection 2: Definition of Categories:

- List the categories that the objects of the collection are organized under. There is no standardized set of categories to follow, and categories should be defined by the type of objects and how they are used.

    - ***EX:***
        - Archives: Documentation of institutional and operational history and its collections, including donor and loan forms, research notes, condition reports, and administration records.
        - Permanent Collection: Primarily collections of the museum that serve as the primary means of accomplishing the preservation and interpretive mission of the institution.
        - Education Collection: Secondary, expendable collections that are used for programming, demonstration, exhibition, or any other interpretive use. Commonly do not serve the preservation mission.
        - Historic Structures: The 35 historic structures at the museum's site that, like the permanent collections, serve as a major resource in accomplishing the preservation and interpretive mission of the institution.
        - Reproduction/Prop Collection: Non-historic collections that primarily serve aesthetic purposes in exhibitions or serve as stand-ins for objects not in the collections or objects that cannot be exhibited.[49]
            - *NOTE: This category of collections should be thoroughly documented to ensure non-historic objects are not mistaken for historic objects by future staff.*

Section 3: Acquisitions, Accessions, and Cataloging

Subsection 1: Acquisitions and Accessions

- Acquisition policy defines the process by which the museum obtains objects that align with the scope of collections, including purchase, donation, loan, and transfer between categories. Accession policy defines the formal process by which the museum legally accepts objects into the permanent collection, including the transfer of ownership rights to the museum entity.

[49] Simmons, *Things Great and Small*, 40.

- Acquisition and accession policies should provide clear criteria and priorities that guide the acceptance of new objects in alignment with the institutional mission and scope of collections. These criteria should support the continued development of the collection by strengthening existing holdings and addressing identified gaps. Below are example lines within a broader set of accession criteria:

    - ***EX Line 1:*** "All new acquisitions and accessions should support the museum's mission to collect, preserve, and interpret the histories and cultures of Southern Appalachia."
        - *NOTE: Tie directly to the missions of the museum and the scope of collections*

    - ***EX Line 2:*** "New acquisitions and accessions should prioritize objects and narratives that support the interpretation of rural religious practices, women business leaders, and African American artists and craftspeople in Southern Appalachia."
        - *NOTE: These prioritizations should help fill gaps in the collection or enhance existing collections.*

- Acquisition and accession policies should also establish procedural guidelines for bringing objects into the collection, including the use of deeds of gift, loan agreements where applicable, and documentation for purchased items. Further, accessioning policies should include statements on the capacity of collections storage space, and the impact the acquisition of new collections will have on capacity and operations. Policies should also define levels of authority and responsibility among museum staff for the review, approval, and execution of acquisition and accession decisions.
    - *NOTE: After review, the current deed of gift forms are appropriate for continued use and align with the recommended solutions in this report.*

- Finally, these sections should include the legal or ethical obligations and restrictions for collection acquisition and accessioning.[50]

[50] Simmons, *Things Great and Small*, 45-51.

Subsection 2: Cataloging and CMS

- Establish the process and standards of cataloging objects in the dedicated Collections Management System (CMS), providing the steps, such as receiving the object and donor/loan form, assigning accession numbers, filling in metadata fields, linking object records, and creating a condition assessment cycle. Below is just one of the steps and standards included in the cataloging section.

    - ***EX: Defining the Process of Assigning Accession Numbers***
        - "Upon accession, all objects will be assigned a unique accession number. Each part of the number provides specific information about the object. Using the Arnwine Cabin's accession number, *2005.0.A-000*, as an example, below is the process for creating a unique accession number for all accessioned objects.
            - The first segment reflects the year the object was cataloged, such as 2005 as the object was cataloged in 2005.
            - The second segment reflects the accession group or lot designation, such as "0", which designates the group of objects that entered the collection together.
            - The third segment serves as an identifier that reflects the donor, collection, or site, such as "A" for Arnwine.
            - The final segment identifies the individual object within that group of objects, beginning with "000" for the primary object and continuing sequentially, so the next objects would end with "001," "002," etc.

        - *NOTE: The curator has expressed the desire to keep the current system of accession numbers due to the scale of the collections. This example can serve as a model for defining the accession number system in the future.*

- Also define levels of authority and responsibility among museum staff for the process of cataloging, reviewing, and maintaining the CMS.[51]

[51] Simmons, *Things Great and Small*, 46-47.

Section 4: Deaccession and Disposal

- Similar to the accession policy, the deaccession policy defines the process by which the museum permanently removes objects from its collections. This policy section should outline the legal and ethical implications of deaccessioning, define levels of authority and responsibility among museum staff for the review, approval, and execution of the deaccessioning process, and criteria by which objects are selected for deaccessioning. This policy should reinforce that all deaccessioning should support the museum's missions and serve to adhere to the scope of the collections.[52]

Section 5: Loans

- Establishes standards and criteria for what types of institutions the Museum of Appalachia will loan objects to, what types of objects can be loaned out, and what reasons are appropriate for loan. The policy should also define the levels of authority and responsibility among museum staff for the review, approval, and execution of loans out to other institutions. Further, these should be guidelines for the process of loaning out objects, such as what forms must be filled, how objects should be packed and received, and the processes for borrowing objects on loan from other institutions.[53]

Section 6: Objects in Custody

- "Objects in Custody" refers to objects in the collection that are found without records or objects left in the museum (such a loaned items that were never returned or asked for their return), or any unclaimed objects in the collection. This section should identify existing objects in custody, and give guidelines for how museum personnel should handle objects without clear ownership or provenance.[54]

Section 7: Documentation

- Establish standards and procedures for the documentation of collection objects in order to provide standardized and permanent proof of what an object is, where it originated, how its been used or altered, and who maintains ownership of the object. A policy should also identify which museum personnel is responsible for object documentation creation and maintenance. Documentation should exist across multiple types of media.

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[52] American Alliance of Museums, *Reference Guide*, 4.
[53] Simmons, *Things Great and Small*, 82-83.
[54] American Alliance of Museums, *Reference Guide*, 5; Simmons, *Things Great and Small*, 97-98.

- ***Physical Documentation:*** Examples of physical documentation include the object tag with an accession number, original donor records, museum personnel and donor research notes, print email messages, and other records tied to a document.

- ***Digital Documentation:*** Examples of digital documentation include object records stored in the CMS, scanned digital copies of the aforementioned physical media, photographs of objects, condition reports, or even videos of programs using the objects.

- A documentation policy ensures that all types of object documentation are standardized across collections and follow consistent record preservation practices. The policy ensures accurate and consistent recordkeeping of objects.[55]

Section 8: Collections Care

- Outlines a hierarchy of priority for the care and physical preservation of objects in the museum's collections. A care policy should establish criteria of what objects receive priority in hands-on conservation, whether the object is more valuable or an object is at a higher risk of physical deterioration. Some identify specific collections for prioritized care, while others establish broader criteria to grade objects on whether they should be prioritized over others.[56]

- *NOTE: Due to the large scale of collections, the author highly recommends developing a few criteria for collections value / sensitivity to degradation.*

Section 9: Access and Use

- Designates who has access to the museums, for what reasons, and how those collections will be used in the context of public access. It further outlines ways the museum will safeguard collections and how the collections are made accessible to the widest demographics, while also considering staff and facility capacity, legal and ethic considerations, and preservation concerns.[57]

[55] Simmons, *Things Great and Small*, 103-104.
[56] Simmons, *Things Great and Small*, 109-110.
[57] American Alliance of Museums, *Reference Guide*, 5-6; Simmons, *Things Great and Small*, 125-126.

Section 10: Risk Management

- Identifies potential sources of hazards to the collections and identifies systems to minimize any risk to the collections from those sources and procedures to safeguard collections in hazardous circumstances. These sections range from just statements of responsibility of safeguarding collections to full disaster plans and full breakdowns of safeguard systems. This section should also include the types of insurance coverage provided for the collections.[58]

Section 11: Intellectual Property

- An intellectual property policy is a critical section in ensuring the legal use of collection material. This section commonly addresses the process of gaining copyright ownership or securing appropriate rights from accessioned collections, as well as adherence to intellectual property laws and standards. It should define how the museum manages copyright, reproduction rights, and permissions for the use of collection materials in exhibitions, publications, and digital platforms.

- *NOTE: Given the Museum of Appalachia's strong emphasis on storytelling, any formally conducted oral histories should adhere to established legal and ethical guidelines. Particular attention should be given to the use of informed consent and release forms that clearly define copyright ownership and permitted uses of oral history materials. Staff should follow the best principles and practices outlined by the Oral History Association, including their Principles and Best Practices and Statement on Ethics.*[59]

Section 12: Cultural Property

- "Cultural Property" is defined by John E. Simmons as "objects that are designated by a nation or cultural group as having unique importance for historical, cultural, or religious reasons, and may include ritual objects, sacred objects, and human remains." This designation can impact all areas of collections management, particularly the acquisition, ownership, loan, and deaccessioning of objects and collections. Cultural property is also central to the principle of repatriation, or the process of permanently deaccessioning and returning cultural objects, artifacts, and human remains from museum collections to their communities, nations, or descendants of origin.

[58] American Alliance of Museums, *Reference Guide*, 5; Simmons, *Things Great and Small*, 143.
[59] Oral History Association, *OHA Principles and Best Practices: Statement on Ethics* (2025), accessed April 6, 2026, https://www.oralhistory.org/wp-content/uploads/2025/12/2025-OHA-PrinciplesBP_Statement-on-Ethics.pdf.

- A cultural property policy should establish clear processes for reviewing both existing collections and potential acquisitions to determine whether objects may be considered cultural property. It should define levels of authority and responsibility among museum staff for conducting these reviews and making determinations on what objects constitute cultural property, including when consultation with descendant communities or external experts is required.

- The policy should also provide procedures for identifying collections that raise ethical or legal concerns regarding their status as cultural property. This includes outlining methods for researching and identifying associated communities, nations, or descendants of origin, their types of identified cultural property, and establishing guidelines for communication, consultation, and collaboration with those groups.

- Additionally, the policy should define the steps for addressing such collections, including criteria and procedures for repatriation, shared stewardship, or continued care under appropriate conditions in consultation with descendant groups. These processes should also align with applicable federal legislation where relevant, such as the Native American Graves Protection and Repatriation Act.

- ***IMPORTANT NOTE: The author strongly recommends a formal review of the Native American Artifacts Exhibit in the Hall of Fame for potential Cultural Property concerns and possible compliance requirements under the Native American Graves Protection and Repatriation Act. Particular attention should be given to the presence of the "Death Mask" currently on display, which may constitute a culturally sensitive funerary-related object and may have been removed from its original burial or cultural context. As such, its display raises potential ethical and legal concerns regarding collection history, ownership, and display.***

- ***If the museum receives federal funding (e.g., through grants), the presence of such materials may also trigger NAGPRA-related responsibilities, including a completed collection inventory, consultation with affiliated Tribal Nations, and, where applicable, repatriation or changes in stewardship.***

- ***To address this, the museum should establish a dedicated review process, potentially through an initial project, institutional partnership, or supervised internship, with regional graduate programs in archaeology, anthropology, or museum studies. This work should focus on researching provenance, administrative history, and object context within the relevant collections to identify materials that may meet definitions of Cultural Property. Given the specialized nature of this work, the author recommends that the initial review of the exhibit collection be conducted or directly supervised by a professional with graduate-level training in anthropology, archaeology, or museum studies, and with training in NAGPRA compliance, collections research, and consultation practices.***[60]

Section 13: Ethical Considerations

- Establish a code of ethics that formalizes the principles that guide the decision-making processes and professional behavior of museum personnel. This section should define the core values and ethical standards that align with its interpretive and preservation mission and duty to the public as a museum entity.[61]

[60] National Park Service, "Glossary," *Native American Graves Protection and Repatriation Act (NAGPRA)*, accessed April 6, 2026, https://www.nps.gov/subjects/nagpra/glossary.htm.
[61] American Alliance of Museums, *Reference Guide*, 3.

Section 5: Institutional Partnerships

Section Overview

This section provides some guidance for pursuing institutional partnership with local universities to facilitate internships and hand-on practicum experiences to aid in the long-term maintenance of the CMS and policy.

Some of the recommendations and processes explored in this report require large-scale, hands-on work to accomplish. In particular, the periodical institution-wide condition assessments of the MoA collections require both a working knowledge of collections assessment and preservation and a sizable team. While the author believes such work can be conducted by the existing volunteer base, for larger or more specialized projects, the author proposes that it pursue institutional partnerships with local, regional, and state-wide academic institutions with programs in museum studies, archival management, conservation, and art history that may be interested in facilitating hands-on student projects or internships.

Depending on the program and courses offered at each institution, these collaborations could allow periodical condition assessments and other collections-based projects, such as accessioning and deaccessioning new and old collections, condition assessments for collection objects, interpretive recommendations, and use of collections in educational programming.

NOTE: Due to the scope and priorities of the project, this section is secondary and less developed than the other strategic solutions sections and will be developed further in collaboration between the author and MoA staff.

Partnership Candidates

Recommended Partnership Candidate:

1) **University of Tennessee, Knoxville:** Local, and offers a bachelor's in Art History with a Museum and Curatorial Studies concentration, thus, may have courses and internship programs that could incorporate MoA collections into internships or course practicum work. UTK also offers a master's in Information Science with an Archives and Records Management focus, which may help in any projects to update donor, object, and loan records management systems.

Other Possible Programs:

2) **University of Tennessee, Chattanooga:** Undergraduate Minor in Historic Preservation

3) **Tusculum University:** Bachelor's Degree in History, Museum Studies Concentration

4) **East Tennessee State University:** Heritage Interpretation and Museum Studies Graduate Certificate and Archival Studies Graduate Certificate

Future Strategic Plan Partnerships

Furthermore, for more intensive, large-scale, or transformative projects that require both specialized knowledge and a larger team of workers, the author strongly recommends reaching out to organizations such as Middle Tennessee State University's Center for Historic Preservation (CHP). The CHP regularly partners with museums and historic sites to conduct preservation surveys, collection condition assessments, and strategic plans, such as this report. In addition to these services, the CHP can also connect MoA staff to professional resources, including technical guidance and best practices for preservation and collections management.

NOTE: This solution was not fully developed as the CMS selection and policy outline due to the limited scope of the project. This aspect can be further developed and planned based on further collaboration between the author and the MoA staff.