

# International Society Daughters of Utah Pioneers

## Satellite Museum Policies and Guidelines



Adopted by International Executive Board November 6, 2023.

### **International Society Daughters of Utah Pioneers Satellite Museum Mission Statement**

The mission of all Daughters of Utah Pioneers satellite museums is to collect, preserve, and display the artifacts belonging to the Utah Pioneers who settled the State of Deseret/Utah Territory from July 24, 1847, and prior to the arrival of the Transcontinental Railroad on May 10, 1869.

Additionally, we accept artifacts which represent local communities. Our open storage policy and donor-based evaluation of artifacts establish collections that represent the entire pioneer community and serve as easily accessible educational/research opportunities for both descendants and the greater community.

1. Our facilities are donor oriented. Our donors give to us so all their descendants will have opportunities to view their family treasures upon request when feasible. We set the collection guidelines, then they, not we, determine if an artifact is of importance.
2. All descendants of any pioneer can gain better understanding of their ancestors through their personal keepsakes.
3. We acknowledge the lives of every pioneer, not just the religious or prominent individuals.
4. We acknowledge the whole community with all its diversity.
5. We serve as a repository for those who want their artifacts both preserved and displayed when feasible.
6. The visitor determines what is important for him or her to see.
7. We serve as a visually accessible research facility for all.
8. Our goal is to keep the objects in the geographic region in which they were originally used.
9. Artifacts cannot be sold, loaned, or released to anyone else, including previous donors or families.

#### **1. ISDUP Constitution and Bylaws - Museum Director and Company/Camp Museum Board**

- A. A Company/Camp Museum shall have a Museum Director who is appointed by the Company President(s)/Camp Captain(s) as approved by the Company/Camp Executive Board(s). The Museum Director shall serve for a term of two years and shall be eligible for reappointment by the Company President(s)/Camp Captain(s) as approved by the Company/Camp Executive Board(s).
- B. A Company/Camp Museum shall have a Company/Camp Museum Board consisting of a minimum of three Members including the Company President(s)/Camp Captain(s) or her designee from the Company/Camp Executive Board, the Museum Director, and others who shall be appointed by the Company President(s)/Camp Captain(s) as approved by the Company/Camp Executive Board(s). The Company/Camp Museum Board shall serve under the direction of the Company/Camp Executive Board(s).

1. The Company/Camp Museum Board shall be responsible for determining projects, addressing problems, and ensuring that all museum business is handled in an accountable manner. Day-to-day operations and implementation of decisions made by the Company/Camp Museum Board shall be carried out by the Museum Director and museum staff.
2. Deeds, lease agreements, necessary insurance policies, and protection of tax-exempt status shall be reviewed by the Company/Camp Museum Board annually.
3. The Museum Director and museum staff shall accession, preserve, and display artifacts and photos in such places and manner as are consistent with ISDUP policy. The Company/Camp Museum Boards shall be bound by *ISDUP Constitution and Bylaws* and all approved ISDUP Policy for ISDUP Museums.
4. Company/Camp museum collections shall be owned by the ISDUP Company(s)/Camp(s). All accessioned artifacts and pictures become property of the ISDUP Company(s)/Camps(s) and may not be sold, returned to their former owners, or loaned for any purpose. No accessioned artifact may be used or displayed in a location separate from the established museum collection. If a Camp is unable to care for its collection, that collection becomes the property of the Company. If a Company is unable to care for its collection, that collection becomes the property of ISDUP. (*ISDUP Constitution and Bylaws* - Section 9, Page 12; Section 9, Page 16)

## **2. Museum Regulations**

- a. The International Society Daughters of Utah Pioneers Museum Mission Statement above applies to all DUP satellite museums.
- b. All decisions made regarding any DUP satellite museum shall be consistent with *ISDUP Constitution and Bylaws* and approved ISDUP policies and procedures.
- c. All DUP museum collections (and buildings where applicable) are owned by the local DUP organization.
- d. The Museum Director and Museum Board serve under the jurisdiction and authority of the Company President(s) or Camp Captain(s) who have responsibility for that museum.
- e. Failure to comply with the *ISDUP Bylaws* and *ISDUP Satellite Museum Policies and Guidelines* (this document) may result in the dissolving of the Museum Board leadership and museum control being assumed by the Company in the case of a Camp or ISDUP in the case of a Company.

## **3. Museum Policies**

- a. The artifacts collected shall have been owned or made by a Utah Pioneer who arrived in the State of Desert/Utah Territory prior to the arrival of the Transcontinental Railroad on May 10, 1869. All artifacts shall have been made prior to 1900. Each museum, at the discretion of the Museum Board, may collect some artifacts after 1900 if they feel they are of special significance to their community. Special emphasis shall be placed on those artifacts representing pioneers of their own communities.

- b. All artifacts, display cases, materials, and buildings are owned in perpetuity by DUP. No artifact shall be loaned, traded, or de-accessioned to an individual or to another organization. No artifact shall be sold, given away, or returned to a donor or the donor's family.
- c. All artifacts shall be displayed according to the available space and condition of the items.
- d. All DUP museums, artifacts, and collections belong to Companies and Camps under ISDUP. Companies and Camps are responsible to maintain their complete collection. If a Camp is no longer able to do so, the Camp shall notify the Company and ISDUP in writing. The collection then becomes the responsibility of the Company. In the case of a Company not being able to care for their collection, the Company shall notify ISDUP in writing and the collection becomes the responsibility of ISDUP to relocate to another DUP satellite museum or to the ISDUP Museum. Items can only be relocated under the authority of ISDUP and with the proper accession and relocation paperwork.
- e. Yearly annual financial reviews (Company, Camp, or Satellite Museum) track all funds of museums, cabins, cemeteries, and collections owned by DUP. (See item 5, Museum Finances, for more information.)

#### **4. Museum Governance**

- a. Museums have a Board of Directors. There shall be at least three members on the Museum Board, but there may be more if desired.
- b. In the case of a Company Museum Board:
  - The Company Executive Board appoints a Museum Director; together they choose the other members of the Museum Board.
  - The Company President or her appointee from the Company Executive Board is a member of the Museum Board.
  - The Museum Board shall serve under the direction of the Company Executive Board. The Museum Director, together with the Museum Board, makes all decisions concerning the museum with the approval of the Company Executive Board.
  - The Museum Board is accountable to the Company Executive Board.
  - If more than one Company has jurisdiction over the collection, each Company President or her designee from her Company Executive Board are members of the Museum Board.
  - The Museum Director shall serve for a term of two years and shall be eligible for reappointment by the Company Executive Board.
- c. In the case of a Camp Museum Board:
  - The Camp Executive Board appoints a Museum Director; together they choose the other members of the Museum Board.
  - The Camp Captain or her appointee from the Camp Executive Board is a member of the Museum Board.
  - The Museum Board shall serve under the direction of the Camp Executive Board. The Museum Director, together with the Museum Board, makes all decisions concerning the museum with the approval of the Camp Executive Board.
  - The Museum Board is accountable to the Camp Executive Board.

- If more than one Camp has jurisdiction over the collection, each Camp Captain or her designee from her Camp Executive Board are members of the Museum Board.
  - The Museum Director shall serve for a term of two years and shall be eligible for reappointment by the Camp Executive Board.
- d. Museum Board meetings shall be held at a regular time, date, and place.
- e. At least three people shall have keys to the Museum: the Company President(s) or Camp Captain(s), the Museum Director, and a member of the Museum Board.
- f. In the case of any new appointments, the keys shall be relinquished to those individuals.
- g. The Museum Board shall be responsible for:
- Establishing museum projects.
  - Determining museum priorities.
  - Seeing that all museum and financial matters are handled openly and according to ISDUP financial policies.
  - Ensuring that all financial reports and paperwork are completed and accessible to all members of the Museum Board and to ISDUP upon request.
  - Determining the need for grants and ensuring all grant monies are used for the purposes outlined in the grant.
  - Reviewing deeds, lease agreements, necessary insurance policies, and tax exemption status annually.
- h. The day-to-day application of the decisions made by the Museum Board will be carried out by the Museum Director and the museum staff.
- i. All decisions made regarding any DUP museum shall be consistent with ISDUP *Constitution and Bylaws* and approved ISDUP policies and procedures.

## **5. Operational Guidelines and Priorities**

- a. Deeds and Other Legal Documents. All legal documents including deeds, leases, and agreements pertaining to DUP museums shall be up to date, safeguarded, and archived.
- If the DUP museum building and land is owned by DUP, there shall be documentation of the deed and liability insurance.
  - If the DUP museum building is owned by DUP but is located on public or private property, there shall be a written agreement (Memorandum of Understanding) with the owner of the land indicating that the building belongs to DUP and shall include agreements for building maintenance and liability insurance.
  - If the DUP museum building or artifact collection and the property where located are owned by public or private entities, there shall be a written agreement (Memorandum of Understanding) indicating that the owner of the building acknowledges that the collection belongs to DUP and shall include agreements for building maintenance and liability insurance.

- If the DUP artifact collection is displayed or housed with another collection in a location not under DUP control, there shall be an agreement that defines the separation of the collections and the responsibilities for each.
  - ISDUP shall be notified in writing beforehand if a building owned by the Company or Camp is to be sold or if new property is being considered for purchase. (This does not include artifacts.)
  - A copy of each agreement is to be kept with Camp or Company records, and additionally a copy is to be provided to the ISDUP Satellite Museum Chair.
- b. Inventory. Museums shall maintain a current inventory of their collection. A copy of this inventory shall also be sent to the ISDUP Satellite Museum Chair.
- c. Accessioning. Each museum shall follow standardized accessioning procedures for all new artifacts. Proper accessioning procedures are found at: [ISDUP.org](http://ISDUP.org) → Museum → Satellite Museum Guidelines.
- Use responsible guidelines in accepting artifacts into the collection. They should be of importance to pioneer history before 1900 or to the settlement of the community. They are of extra value if they belonged to, were made by, or were used by a specific pioneer. We seek to represent all pioneers in each community.
  - DUP personnel cannot give appraisals of artifacts. Appraisals by museum or organizational personnel may constitute a legal conflict of interest.
  - Maintain a permanent accession record.
  - Acquire a written deed of gift for each donation.
  - Provide a letter of thanks for each donation.
- d. Collection Management
- Care and handling of artifacts shall only be done by trained staff members under the supervision of the Museum Director. Proper procedures for care and handling of artifacts are found at: [ISDUP.org](http://ISDUP.org) → Museum → Satellite Museum Guidelines → Care and Handling Museum Handout.
  - Artifacts shall never leave the collection site except for professional conservation purposes. This prohibits any loans to any other exhibit or returns to any previous owners, donors, or current family members of the donated artifacts. No artifact may be used or displayed in a location separate from the established museum collection.
  - No artifact or exhibit shall be taken on loan.
  - Each newly accessioned artifact shall be documented on a Catalog Worksheet, including descriptive information, measurements, original ownership, and donor information. A catalog worksheet sample can be found at: [ISDUP.org](http://ISDUP.org) → Museum → Satellite Museum Guidelines → Accessioning Procedures - Sample Catalog Worksheet.
  - Each artifact shall be marked with its accession number and displayed and labeled in an appropriate manner.
  - Inventory management should be kept on computer if possible.
  - Human remains shall not be accessioned or displayed (NAGPRA Repatriation Act).
  - New artifacts, especially fur and feathered items, shall be thoroughly examined as needed to detect insects and other destabilizing conditions.

- DUP is responsible for stabilizing and care of artifacts. If restoration is required, a professional may be consulted.
- e. Schedule
- Clearly post days and times museum is open to the public and/or contact information for appointments.
  - Each DUP museum should consider being open on July 24<sup>th</sup>, on the state's museum day, and on special community celebrations.
  - Keep ISDUP Satellite Museum Chair apprised of the museum schedule and contact information to be posted on ISDUP website.
- f. Establish Emergency Procedures
- The Museum Board should consider appropriate actions in the case of fire, water damage, earthquake, or other disasters.
  - The Museum Board should have contact information readily available for police, fire station, gas Company, electric Company, water Company, etc.
  - Security procedures should be carefully considered, such as having at least two people working at the museum and installing security cameras if possible.
- g. Americans With Disabilities Requirements. Please be advised that DUP Museums are required by law to follow the Americans with Disabilities Act (ADA). This act states that "Private businesses are required to ensure equal access to qualified individuals with disabilities, which includes allowing service animals to enter the establishment." Additional information can be obtained on the website [www.ADA.com](http://www.ADA.com).
- h. Docents
- In most museums, well-informed, welcoming docents are a great asset. For larger museums it is essential that there be docents to welcome and inform visitors and watch over the artifacts in the museum. Docents may be:
    - Daughters from the various Camps
    - Associates from the various Camps
    - Members at Large
    - Spouses of Daughters and Associates
    - Adult children and family members of Daughters and Associates
    - Community volunteers
  - Docents may be male or female and must be at least 18 years of age.
  - Camps and Companies shall not be given quotas for providing docents. However, Camps and Companies should be made aware of the need for docents and can be critical resources in providing or finding docent volunteers. A Company or Camp with a museum cannot require a neighboring Company or Camp to provide docent volunteers, rather communication can be sent requesting volunteers and daughters can volunteer on their own.
  - Docents should be aware of the ADA requirements which allow service animals in DUP Museums and other buildings. Information can be found at: [www.ADA.com](http://www.ADA.com).

## 6. Museum Finances

- a. Accounts and investments for museums can be separated from DUP accounts as long as records are reported to the Company or Camp Treasurer. The Museum Treasurer shall:
- Oversee and track all financial income and expenditures connected to the museum.
  - Provide monthly hard copy financial income and expense statements at Museum Board meetings for review and approval of the members of the Museum Board.
  - Provide a hard copy balance sheet to the members of the Museum Board at least once a year.

For those museums with bank accounts or funds tracked separately from Company or Camp bank accounts:

Complete the Satellite Museum Annual Financial Review (found at: [ISDUP.org](http://ISDUP.org) → Forms tab → Treasurer) following the completion of the fiscal year on May 31 and submit a copy with required signatures to the ISDUP Treasurer by June 30. Provide a copy to the sponsoring company(ies) or camp(s) for their archives.

- For museums under the jurisdiction of more than one Company: Send the completed Satellite Museum Annual Financial Review with required signatures directly to the ISDUP Treasurer by June 30. A copy should also be sent to each of the overseeing Companies by that same date for their archives.
  - For museums under the jurisdiction of a Company: Provide a copy of the completed Satellite Museum Annual Financial Review with required signatures to the Company Treasurer by June 15. The Company Treasurer will then send a copy of this report along with the other report(s) due to ISDUP by June 30. A copy should be archived by the Company.
  - For museums under the jurisdiction of a Camp: Provide a copy of the completed Satellite Museum Annual Financial Review with completed signatures to the Company Treasurer by June 15. The Company Treasurer will then send a copy of this report along with the other report(s) due to ISDUP by June 30. A copy should be archived by both the Camp and the Company.
- The Satellite Museum Annual Financial Review will be used to prepare the Satellite Museum Treasurer's Update (found at: [ISDUP.org](http://ISDUP.org) → Forms tab → District Conventions) and shall be presented to the Company members at an annual Company sponsored event.
  - Three (3) members of the Museum Board are required to be signers on the museum bank account. This shall include the Company President/Camp Captain and Museum Director. In the case of more than one Company President or Camp Captain being on the Museum Board, at least one of these Presidents or Captains shall be a signer on the account. All checks require two signatures.
- b. For those museums that do not have a separate accounting for their museum, either by account or ledger, but include their museum funds within their Company bank account:
- The Company Annual Financial Review (found at: [ISDUP.org](http://ISDUP.org) → Forms tab → Treasurer) submitted to the ISDUP Treasurer by June 30 on an annual basis will suffice.
- c. For those museums that do not have a separate accounting for their museum, either by account or ledger, but include their museum funds within their Camp bank account:
- A copy of the Camp Annual Financial Review (found at: [ISDUP.org](http://ISDUP.org) → Forms tab → Treasurer) shall be forwarded to the ISDUP Treasurer by the Company Treasurer at the same time the Company Annual Financial Review is submitted, due to ISDUP by June 30.

- d. Be familiar with IRS and Tax Guidelines as outlined found at: ISDUP.org → Leadership tab → Treasurer and ISDUP.org → Leadership tab → IRS and Tax Guidelines. Tax exempt status is required under ISDUP for all DUP museums.
- e. Ensure that the filing of the required 990-N e-postcard (or in some cases, the 990-EZ form) outlined in these instructions is done annually in accordance with IRS guidelines to protect your tax-exempt status under ISDUP per the instructions outlined above. Click [here](#) to file the 990-N e-postcard. Click [here](#) to access a helpful printable user guide you can use in your e-filing. The postcard and instructions can also be accessed on the IRS website ([www.efile990n.org/index.html](http://www.efile990n.org/index.html)).
- f. Provide any other financial records pertaining to the museum in a timely manner when requested by ISDUP.

## 7. Donations and Fundraisers

- a. Individual museums are responsible to obtain their own operational funding and can only do so with the tax-exempt status required under ISDUP. This may be achieved in the following ways:
  - An appropriate donation amount may be requested from Camp members on an annual basis with an explanation as to the needs and uses of these funds. These donations may be collected at the same time as the other annual dues are collected and a single check from the Camp would then be dispensed to the museum if the Camp has jurisdiction over it.
  - In the case of Company with jurisdiction over a museum, donations could still be collected as above on the Camp level and then would be sent on to the Company along with the other dues. The Company would then dispense a single check to the museum for those funds collected within that Company specifically earmarked for the museum from the donors.
  - **Donations to a DUP Museum cannot be required from Members or Associates and a Member's or Associate's active status is not affected by whether or not they choose to donate to the local DUP Museum.**
  - Bazaars, fairs, bake sales, etc. may be held.
  - Cookbooks and other items may be sold at museum gift counters or at community events clearly identifying the DUP museum as the recipient of the monies taken in.
  - Donation boxes may be placed within the museum.
  - Monetary donations from businesses or individuals (outside of those collected along with other Camp/Company dues) may be accepted with appropriate documentation given to the donors for tax purposes.
- b. If donations exceed \$50,000 per year, filing the 990-N e-postcard is not adequate to maintain non-profit status as a subordinate under ISDUP. In those cases, it is recommended that donations be made directly to ISDUP identifying the museum for which the donation is intended, and ISDUP will donate the money back to that entity.

## 8. Grants

- a. Grant money shall only be used for the purpose stated in the grant.
- b. Grants shall be completed as proposed.

- c. The Museum Treasurer shall:
  - Provide a copy of all grant applications to the ISDUP Satellite Museum Chair.
  - Send in a timely manner the grant completion form upon approval to the ISDUP Satellite Museum Chair.
  - Handle all grant monies separately from other museum monies.

## **9. Pioneer Histories and Photographs**

- a. Histories and photograph collections are usually taken care of by the local DUP museum and are considered part of the local DUP museum collection.
- b. These are preserved as part of the DUP sacred trust and are not to be loaned or distributed by any other organization; however, copies are available and may be purchased for your personal family records.
- c. Histories. A copy of each history shall be mailed to the ISDUP History Department if it has not already been done.
- d. Photographs. The photograph collection shall be cared for as artifacts. See Care and Handling Procedures Handout found at: ISDUP.org → Museum → Satellite Museum Guidelines.

## **Resources Found at ISDUP.org**

- Satellite Museums Policies and Guidelines (*this document*) found at: ISDUP.org → Museum tab → Satellite Museum Guidelines → Satellite Museum Policies and Guidelines and at: ISDUP.org → Leadership tab → Camp/Company Officer Information → Satellite Museum Policies and Guidelines
- Museum Director and Museum Board Responsibilities found at: ISDUP.org → Leadership tab → Camp/Company Officer Information and at: ISDUP.org → Museum tab → Museum Director and Museum Board
- Artifact Care and Handling and Procedures Handout found at: ISDUP.org → Museum tab → Satellite Museum Guidelines → Care and Handling and Museum Handout
- Sample Memorandum of Understanding found at: ISDUP.org → Museum tab → Satellite Museum Guidelines → Sample Memorandum of Understanding
- Guidelines for Docents found at: ISDUP.org → Museum tab → Satellite Museum Guidelines → Guidelines for Docents
- Accessioning Procedure documents found at: ISDUP.org → Museum tab → Satellite Museum Guidelines →
  - Sample Catalog Worksheet
  - Sample Deed of Gift
  - Sample Inventory Format
  - Sample Form for Consideration of a Donation