



COLLECTION POLICY

2015-2020

Policy Information

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Executive Summary

The Otago Museum Collection Policy outlines the standards and practices applied to all collection items to ensure they are acquired, documented, maintained, utilised and disposed of within professional standards, and that all relevant legal and ethical obligations are met.

The Otago Museum has been collecting items from nature, culture and science since its inception in 1868. As defined by the Otago Museum Trust Board Act 1996, the Otago Museum is legislated to collect and preserve biological, geological, scientific, Māori and indigenous items. There are an estimated 1.5 million items within the collections, held in trust for the benefit of local iwi, the people of Otago, New Zealand and the world. The Museum holds some of the largest and most extensive collections of taoka Māori and the Pacific in the world. There are comprehensive collections from Southeast Asia, Australia, the Americas and Africa, as well as extensive collections of costumes and textiles, coins and medals, antiquities and the decorative arts. Within the natural sciences, the Museum houses rich and diverse collections of invertebrate, vertebrate and geological material. Highlights include over 1,000 type specimens, one of the largest New Zealand spider collections and one of the most comprehensive collections of moa specimens held anywhere in the world. Indeed, all Museum collections encompass items of national and international significance.

We cannot adequately undertake research without our collections. These provide irreplaceable references, or records, against which we are constantly building and modifying our knowledge and understanding of our natural and cultural worlds. They represent a vital part of our nation's heritage and play an integral role in the international scientific accord to document our world. They are an essential part of New Zealand's future as they provide the raw material on which researchers can discover the extent and character of natural, Māori and indigenous diversity and how they may be sustained in the future.

1.0 Definitions

Accession

The formal process of recording or processing the addition of an item to the permanent collection.

Acquisition

When the legal title of an item is transferred and the Otago Museum becomes the owner.

Bequest

Acquisition involving an individual transferring title of an item to the institution upon his or her death, through a will.

Deaccession

The formal process of removing an item from the permanent collection.

Disposal

The act of physically removing an item from the collection, including transferral of ownership. Disposal of a collection item can only take place after the formal process of deaccessioning is completed.

Item

The general term used for an object, artefact, record or specimen.

Iwi

People of local tribes, sub-groups also known as rūnaka or rūnanga.

Loans

Loans are temporary transfers of collection items from the Museum, or temporary transfers of items to the Museum for stated Museum purposes or purposes approved by the Museum. The transfers do not involve a change of ownership.

Lot

The term used to define a group of specimens recovered from the same location at the same time. These groups are often stored and documented together.

Non-collection item held for interpretive purposes

An item owned by the Otago Museum, which is not appropriate to be part of the accessioned permanent collection. A non-collection item may be used for display, education or research purposes, and may be an original or replica item.

Provenance

The proven or documented place of origin, use, history and ownership of an object.

Registration

The act of giving an item a unique number and recording it. Registered items may be items due to be added to the permanent collection, non-collection items held for interpretive purposes or loan items from external sources.

Restricted material

Restricted material is a collection item, image, data or information to which unrestricted access may cause offence or endanger the safety or sanctity of that item, image, data or information, or of a locality from which the material came.

Service material

An item owned by the Otago Museum, which is not appropriate to be part of the accessioned permanent collection. Service material may be used for display, education or research purposes, and may be an original or replica item.

Taoka

Also known as taonga or treasured object, in this document defined as Māori artefacts from the collection.

Tikaka

Māori customary practices.

Type specimen

A type specimen is a zoological or mineral specimen that serves as a reference point when a description of a new species is made. The most important type specimen is a holotype, the original specimen from which a species description was based.

Voucher specimen

A voucher specimen is a zoological, botanical or mineral item that is collected and lodged in the Museum for the purpose of vouching or confirming its identity when referred to or examined in another study.

Whakapapa

Genealogical links.

2.0 Vision and Mission Statements¹

2.1 Vision

To be an inspirational Museum of which the people of Otago and Aotearoa are proud.

2.2 Mission

To inspire and enrich our communities and enhance understanding of the world through our collection, our people and the stories we share.

3.0 Policy Statement

- The Otago Museum (hereafter referred to as ‘the Museum’) is dedicated to the collection, preservation and interpretation of items and information relating to the natural, scientific and cultural heritage of local iwi, Otago, New Zealand and the world.
- Integral to its role, the Museum must develop, preserve, research and interpret the collection and promote interest and education in natural, scientific, Māori and indigenous heritage for its community, for New Zealanders and for researchers and visitors from around the world.
- The Museum will at all times operate in accordance with the principles of the Otago Museum Trust Board Act 1996, which forms the basis of the mandate for the Collection Policy.

¹ Te Ara Hou, The Road Ahead, Otago Museum Strategic plan 2014–2020

- All collection items will be managed in a culturally appropriate manner with reference to appropriate tikaka.
- The Act states that the Museum may acquire or dispose of objects and data in accordance with its Collection Policy, recognised museum practice and ethics frameworks, taking cognisance of its trusteeship role in the community.

4.0 Standards and Guidelines

The Museum is committed to achieving standards of excellence, as defined by national and international professional codes. This collection policy conforms to the relevant provisions of the following legislation, codes and standards:

- The Treaty of Waitangi Te Tiriti o Waitangi
- Museums Aotearoa, 2013, Code of Ethics and Professional Practice (www.museumsaotearoa.org.nz)
- ICOM Code of Ethics for Museums, 2013 (www.icom.org)
- ICOM Code of Ethics for Natural History Museums, 2013 (www.icom.org)
- Museums Association UK, 2007, Code of Ethics for Museums (<http://www.museumsassociation.org/ethics/10935>)
- Museums Australia, 2013, National Standards for Australian Museums and Galleries – Version 1.3
- Heritage Collections Council, 1998, *reCollections: Caring for Collections across Australia*, Canberra
- McKenna, G & Patsatzi, E (Eds). 2011, *SPECTRUM: The UK Museum Documentation Standard*, MDA, Cambridge, 4th Edition
- CIDOC – The International Committee for Documentation of the International Council of Museums (ICOM) (<http://network.icom.museum/cidoc/resources/cidoc-standards-guidelines/>)
- SPNCH, 1998, *Guidelines for the Care of Natural History Collections* (www.spnhc.org)
- Russell, R and Winkworth, K. 2008, *Significance 2.0: a guide to assessing the significance of collections*. Collections Council of Australia.
- Protected Objects Act, 1975 (amended 2006) (www.legislation.govt.nz)
- New Zealand Conservators of Cultural Material Code of Ethics, 1995 (www.nzccm.org.nz/code-of-ethics)
- Copyright Legislation (www.legislation.govt.nz)
- Artists Alliance Code of Practice (www.artistsalliance.org.nz)

Legislative Framework

- Arms Amendment Act 2012
- Conservation Management Strategy (Various – refer to Department of Conservation)
- Conservation Act 1987
- Convention on International Trade in Endangered Species (CITES)
- Copyright Act 1994
- Historic Places Trust Act 1993
- Local Government Act 2002
- New Zealand Wildlife Act 1953
- Trade in Endangered Species Act 1989
- National Parks Act 1980
- Marine Parks and Reserves act 1994
- Marine Mammals Protection Act 1978
- Privacy Act 1993
- Protected Objects Act 1975

- Public Records Act 2005
- Reserves Act 1977

Otago Museum Policies and Procedures

- Accidents Involving Items on Display Operational Guidelines
- Collection Development Strategy
- Collection Acquisition Procedure Operational Guidelines
- Crating Operational Guidelines
- Deaccessioning Operational Guidelines
- Destructive Sampling Agreement
- Destructive Sampling Operational Guidelines
- Digitisation of Collection Items and Information Operational Guidelines
- Isolation Protocols Operational Guidelines
- Inward Loan Procedure Operational Guidelines
- Item Handling Operational Guidelines
- Item Packing for Storage and Display Operational Guidelines
- Outward Loan Form
- Outward Loan Procedure Operational Guidelines
- Conservation and Collections Care Policy 2015–2020
- Preservation Guidelines for Public Presentation of Collection Items
- Proposal for Access
- Proposal for Acquisition
- Proposal for Deaccession
- Management of Strong Room Operational Guidelines
- Management of Wāhi Tapu Operational Guidelines
- Māori Advisory Committee Terms of Reference
- Receipt of Natural Science Items into the Search Centre Operational Guidelines
- Receipt of Humanities Items into the Search Centre Operational Guidelines
- Research and Publication Strategy
- Materials for Storage and Public Presentation Operational Guidelines
- Photography and Filming Operational Guidelines
- Protected Objects Act Operational Guidelines
- Security and Access Operational Guidelines
- Security and Access Policy
- Vernon Data Entry Operational Guidelines

5.0 Collecting for Whom

The Museum collects for the benefit of local iwi, Otago, New Zealand and the world. Given the significance of its collections, the Museum has a responsibility for servicing the needs of national and international visitors to its sites and online. The Museum is therefore committed to digitising as much of the collections as possible to facilitate access to information for all users.

The Museum recognises that audiences have differing interests and experiences, and aims to provide a range of interpretation and services to meet these needs. Museum staff interpret the collections and communicate with visitors and remote users through galleries and exhibitions, publications, demonstrations, education, events, outreach, social media and online. The Museum is committed to providing access to its collections, which may be used as research and study materials by both local and remote users.

The Museum also acknowledges the interests of commercial users, such as television production companies and publishers, in its collections. Commercial use of the

collections will be encouraged, unless it compromises the integrity and/or preservation of the items in question, as a means of raising and increasing public awareness of the Museum's collections. Any commercial income directly arising from the use of the collections will be applied for the benefit of the collections.

6.0 What We Collect – Collections Focus

6.1 Spatial and temporal characteristics

As defined by the Otago Museum Trust Board Act 1996, the Museum is the only legislated body within Otago with the remit to collect and preserve zoological, geological, scientific and cultural material in perpetuity. As such, the primary spatial focus of the Museum's collections is Otago.

Items from outside Otago will be collected and held primarily when they are necessary for a better understanding of regional phenomena, for comparative scientific or Māori and indigenous study, for interpretive purposes or when such items have become part of Otago's history or culture. Areas of particular interest include the Pacific, South East Asia and Australasia.

Given the Museum's strengths in collection areas ranging from palaeontology to contemporary natural and cultural diversity, the Museum's collections are not confined by temporal parameters.

6.2 Contemporary relevance – our 'Reference Library of Life'

It is vital that the Museum maintains an active programme of collections development in areas of zoological, geological, scientific and cultural diversity, in order to reinforce its position as the key resource for these items in Otago. The Museum will work closely with local iwi, the community, the University of Otago, the Department of Conservation and others to ensure an ongoing program of relevant collections development.²

6.3 Historical significance

With almost 150 years of collecting history, it is inevitable that some collections accumulated by the Museum may not hold the same relevance today as they may have held in the past. As sources of primary data, it is important that they are retained as new technologies emerge that may lead to new discoveries about their nature and our place in the world. These 'passive' collections will be managed and cared for with the same standards as those applied to 'active' collections.

6.4 Research

Collections resulting from specific research initiatives will only be accessioned into the collection where they meet the selection criteria identified here as well as those pertaining to the specific collection in question.³ Collecting to address specific research criteria may also be integrated into core collections.

² Otago Museum Collection Development Strategy 2015–2020, Revised 2015

³ Otago Museum Collection Development Strategy 2015 - 2020, Revised 2015

6.5 Collections focus

Ever diminishing resources have forced museums to reassess their position within the wider cultural and scientific communities. Increasingly, museums are cooperating with like institutions to minimise overlaps in research and collections development and work more collaboratively to ensure limited resources are utilised more efficiently. Based on collection strengths together with contemporary research, interpretation and education priorities at local and national levels, the Museum's collections focus on the following:

- Natural diversity and representativeness, incorporating:
 - Terrestrial invertebrates
 - Marine invertebrates
 - Ornithology
 - Herpetology
 - Mammalogy
 - Ichthyology
 - Geology
 - Palaeontology
 - Botany
- Cultural diversity and representativeness, incorporating:
 - Taoka Māori
 - Indigenous material from the Pacific
 - Indigenous material from the rest of the World
 - European, Māori and indigenous costume and textiles
 - Decorative arts
 - Antiquities
 - Stamps and postage
 - Medals
 - Numismatics
 - Technology (cameras and firearms)
 - New Zealand history
 - Prehistory

6.6 Taoka collection considerations

- The Museum recognises the cultural and spiritual connections of taoka with their iwi through their whakapapa.
- Spiritual and cultural ownership rights are conferred through whakapapa in respect of the traditions and histories that taoka represent, as well as the whakapapa of the creator of the taoka.
- These rights accord to the iwi the right to care for their taoka, to speak for them and to determine their use or uses by the Museum.
- Access and general handling of taoka will be in consultation with the Curator, Māori.
- In addition to preservation and conservation, there must be an overall understanding of reconnecting taoka with iwi.
- Collections affected by tikaka will be determined by collections management and/or the Curator, Māori.

7.0 Selection Criteria

Criteria pertaining to the selection of items for accession will be based on those outlined in section 6 together with any specific criteria identified at the individual collection level.

The Museum will acquire items if they conform to the Collections Development Strategy, 2015–2020⁴.

Other than in exceptional circumstances the following criteria will apply to all collections:

- Items may be acquired by donation, bequest, exchange, purchase or field collecting activities
- Items will only be accessioned into collections if accompanied by adequate contextual and/or scientific data
- Full title must accompany any item to be accessioned into the collections
- There are no encumbrances attached to the item(s)
- The Museum reserves the right to decline any offer of gift to the collection.

7.1 Significance

Significance criteria, based on guidelines defined by the Collections Council of Australia⁵, will be used to inform the acquisitions process. In general items will be assessed against one of four primary criteria:

- Historic
- Artistic or aesthetic
- Scientific or research
- Social or spiritual.

Comparative criteria will be used to evaluate the degree of significance including:

- Provenance
- Rarity or representativeness
- Condition or completeness
- Interpretive capacity.

A 'statement of significance' will accompany any formal submission for a new acquisition(s).

8.0 Acquisition

8.1 Ethical standards

- Acquisitions will comply with relevant local and national legislation, regulations and permit requirements, and those international agreements and conventions to which New Zealand is a signatory (refer Section 3.0).
- Acquisitions will be made in such a manner, and involving such quantities, as to have no deleterious effects on the survival of local or regional biota or communities, nor likely to have negative impacts on other societies or cultures.
- The Museum will not knowingly acquire, by direct or indirect means, any item that has been collected, sold or otherwise transferred in contravention of any international laws, agreements and conventions.
- Should the Museum discover that it has inadvertently acquired an item of unsound legal title or provenance, the Museum will seek alternate remedy and return the item to its legal owner.

⁴ Otago Museum Collection Development Strategy 2015–2020, Revised 2015

⁵ Russell, R and Winkworth, K. 2008, *Significance 2.0: a guide to assessing the significance of collections*. Collections Council of Australia.

- All Otago Museum Trust Board members, Museum employees, Honorary Curators and volunteers who have access to the collections must complete the Collections Access Agreement and declaration of interests form.⁶
- No Otago Museum Trust Board member, employee, Honorary Curator, volunteer or their immediate family member may take advantage of information available to them through their relationship with the Museum concerning the acquisition of items for their own personal collecting activities.
- No Otago Museum Trust Board member, employee, Honorary Curator, volunteer or their immediate family member may compete for the purchase of an item that is being considered or is likely to be considered for acquisition by the Museum.
- Where funds are required for purchases, a recommendation will be made by the Director, Collections, Research and Education to the Museum Director for the acquisition. When such an acquisition requires the use of Trust Funds, a recommendation will be made to the Otago Museum Trust Board Chairperson for consent, with subsequent approval by the Board itself at its next meeting.
- The Museum is committed to achieving professional standards for all items in its care within the framework of limited resources of space, staff, funds and conservation capacity for managing the collections. This inevitably means that some items may not be acquired at all because they are too large, complex or sensitive to be accommodated within available resources.

8.2 Consultation with other collecting bodies

The Museum respects the collecting interests and catchment areas of other collections-based institutions. The Museum will consult with these bodies where there are overlapping interests and refer items to more appropriate institutions where relevant. The Museum is committed to building stronger relationships with all relevant bodies to avoid collecting conflicts, identify and address gaps in collection activities and develop research collaboration.

- Other than in exceptional circumstances, the Museum will not collect items that are core to the collection priorities of allied collecting institutions.

8.4 Human remains

- Human remains are defined as any part of the human body that is in an unmodified natural state since death. The Museum does not acquire human remains as part of its contemporary collection development activities.
- Through historical collecting activities, the Museum currently holds human remains from New Zealand, Polynesia, Melanesia, Australia, Britain and Egypt. These will remain accessioned until such time as they may be approved for deaccession by the Otago Museum Trust Board. The Museum will carefully consider formal requests for the return of human remains.
- The Museum recognises the cultural, spiritual, scientific and educational importance of the human remains in its care. The Museum accords respect for the dead to all human remains, irrespective of origin, race, religion, nationality, custom and tradition.
- Under special circumstances, following a formal request, the Museum may agree to act as a repository for human remains and will be responsible for their care and protection.

⁶ Otago Museum, Collections Access Agreement, Revised 2014

8.4.1 Kōiwi takata (Māori human remains)

- This section relates to unmodified human remains identified as Māori and not artefacts found associated with burials such as grave goods, hair or artefacts made in whole or in part from human skeletal material.
- Modified kōiwi takata should be handled, stored and transported with appropriate tikaka (traditional Māori customs). This includes separate and clearly labelled packing that highlights the contents as sensitive items.
- Recognising that most of the human remains in its care are Kāi Tahu, the Museum is guided by the Ngāi Tahu Policy on Kōiwi Takata, 1993.
- Access to the kōiwi takata held in the Wāhi Tapu room is restricted and provided only in consultation with the Curator, Māori, approval from the Māori Advisory Committee and in accordance with the Management of Wāhi Tapu Operational Guidelines.
- The Museum is committed to providing a secure resting place for kōiwi takata and will cooperate with iwi for the repatriation of provenanced kōiwi takata in its care, under the guidance of the Curator Māori and Māori Advisory Committee.
- A decision to return any kōiwi takata will be made by the Otago Museum Trust Board on the recommendation of the Museum Director acting in association with the appropriate iwi authority and under the guidance of the Curator Māori and Māori Advisory Committee.
- Following any notification of the discovery of kōiwi takata in the Otago area, the Museum will liaise with relevant iwi to ensure preservation and appropriate tikaka (traditional Māori customs) of kōiwi takata and their relocation to the Wahi Tapu store, as formally requested, under the guidance of the Curator, Māori and Māori Advisory Committee.

9.0 Registration and Accession

Items acquired by the Museum to be part of the permanent collection, non-collection items held for interpretive purposes or items on loan to the Museum are assigned a unique registration number with an associated record created in Vernon CMS (Collections Management System). Historically, the primary record was established within a handwritten register.

- Items held temporarily by the Museum for identification or as consideration for gift are assigned a unique registration number and an associated article receipt record is created. The registration number will accompany the item at all times while it is held by the Museum.
- Non-collection items held for interpretive purposes, such as photographs, artworks, props and casts, are assigned a registration number with an associated record created in Vernon CMS.
- Items acquired as part of the permanent collection will be assigned a unique accession number with all available information entered into the item's record in Vernon CMS.
- An accession number will be attached to each item. Where appropriate, an RFID⁷ tag will also be attached to the item.

10.0 Documentation

Evidence of the identification, condition, history and/or scientific value of an object, specimen or collection when recorded in a permanent manner enhances the value of the

⁷ Radio Frequency Identification

item. These records may actually have to substitute for the item should the item itself deteriorate or be destroyed.

Utilising appropriate Information Communications Technology (ICT), the Museum will develop an end-to-end solution that provides real time access to collections data in galleries and online. The Museum is keen to collaborate with other museums and collecting bodies to improve the delivery of public collections information services by using networked electronic media to link collections. The Museum is therefore committed to national and international initiatives including the Global Biodiversity Information Facility (GBIF) and Digital NZ.⁸

- For collection and non-collection items held for interpretive purposes, all relevant information regarding the item will be recorded in Vernon CMS.
- For accessioned items, this may involve additional research subsequent to the accession process to ensure the highest possible levels of utility for future research, interpretation and exhibition.
- Collection Managers and Collection Officers are responsible for the documentation and records relating to collection items and their management, as well as documentation and records relating to outward and inward loans. Documentation surrounding the acquisition process, condition monitoring, conservation, access, publication and a record of the use of the item will form part of the item's Vernon CMS record.
- Current practice sees images and documentation relating to an item digitised at acquisition. Existing records of historic collection items will be progressively digitised. This process will comply with the 'Digitisation of Collections Operational Guidelines'⁹.
- Collections are documented and classified using scientific nomenclature, Māori language and philosophical frameworks.

11.0 Conservation

The Museum is committed to providing a balance between access to and safe preservation of the collections. The Museum's Conservation Policy and Strategy¹⁰ is based on two program streams:

- Preventive:
 - Environmental monitoring
 - Disaster preparedness
 - Integrated pest management
- Collections Treatment Program.
- Conservation staff are responsible for the day-to-day care, research and analysis of collection items, working collaboratively with Collections and Research staff, under the leadership of the Director, Collections, Research and Education.
- All Museum staff should be aware of their responsibilities to preserve and protect collection items, whether on display or in storage. Staff are responsible for ensuring collection items are adequately protected against all agents of damage or deterioration, including fire, theft, vandalism and pests.

⁸ www.gbif.org, www.digitalnz.org

⁹ Digitisation of Collections Operational Guidelines, revised 2015

¹⁰ Otago Museum, Collections Conservation and Preservation Strategy 2015-20. Otago Museum, Collections Conservation Policy 2015-2020.

11.1 Storage and Security

By definition a museum has a long-term purpose and must possess permanent collections in relation to its stated objectives. Appropriate storage of collections in environmentally controlled and secure stores is therefore a core activity of the Museum. The commitment to meeting and improving standards of care and accommodation of collections is upheld through considerable investment of space, time and money in existing and new display and storage for the collections. The Museum will continue to support the development of new or improved storage facilities to ensure adequate environmental conditions and storage capacity is available for all collection items.

12.0 Access

The Otago Museum encourages the widest possible access to the collections entrusted to its care, and by doing so seeks to document, research and illuminate the diversity of the natural world and the lives of past and present peoples.

- Access to collection items and associated data will be provided to bona fide researchers in a professional manner, within reasonable timeframes and in line with the Security and Access Operational Guidelines.
- A Proposal for Access will be prepared by Collections and Research staff when they receive a request to loan, view, digitise or undertake destructive sampling of a collection item, and for the provision of data relating to a collection item.
- Access to the collection may be restricted or denied for items that:
 - Are fragile or light intolerant
 - Are biological type specimens
 - Are extinct or irreplaceable biological specimens
 - Have spiritual or cultural significance to certain community groups
 - Require conservation treatment which inhibits safe access
 - Are currently on display, being researched or on loan.
- Proposals for access to Taoka Māori will be subject to the approval of the Curator, Māori. Access to significant taoka through provenance or background will be subject to the approval of both the Curator Māori and the Māori Advisory Committee, in line with the Terms of Reference¹¹, and following established operational procedures.
- Māori ritual practices, including cultural restrictions such as tapu and noa, presence of food and taoka, must be observed.
- Handling, storage, packing and transport reflect a Māori world view.
- In light of staff recommendations, access to the collection will be decided by the Director, Collections, Research and Education, and will take into consideration the staff time required to process the request (including preparation time), supervise access, the conservation status of the item and the benefits to the Museum in providing access. The Director, Collections, Research and Education will seek approval from the Museum Director for extraordinary requests.

12.1 Destructive sampling

The Museum defines destructive sampling as any process that physically removes, modifies or consumes part (or in exceptional circumstances all) of a collection item.

- Researchers conducting destructive sampling are required to sign the Otago Museum Destructive Sampling Agreement and staff will follow the Destructive

¹¹ Māori Advisory Committee Terms of Reference

Sampling Operational Guidelines in the processing and completion of such a request, if approved.

- Only bona fide researchers of high repute will be supplied with material for destructive research. Such workers may, however, supervise a junior colleague in carrying out the research.
- Proposals for destructive sampling of collection items require approval from the Director, Collections, Research and Education and the Museum Director, and will take into consideration all the points outlined above. Also considered will be the damage caused to the item by sampling versus the benefit of the results to the Museum. The sampling of items of high significance, such as holotypes, will also be subject to the approval of the Otago Museum Trust Board.
- The sampling of items from taoka collections will additionally be subject to the approval of both the Curator, Māori and the Māori Advisory Committee.

13.0 Loans

The Museum will consider loan requests from other Museums and bona fide research institutions for exhibition or research following completion of a formal request for loan. The Museum will not generally loan items to individuals except under special circumstances approved by the Museum Director. All outgoing and incoming loans must be approved by the Director, Collections, Research and Education in consultation with relevant Collections and Research staff. The Director, Collections, Research and Education will seek approval from the Museum Director in exceptional circumstances.

13.1 Outgoing loans

- Any temporary movement of collection items from the Museum to a third party is regarded as a loan for a finite period of time and the appropriate loan procedure must be implemented.
- The loan period must not exceed three years. In exceptional circumstances, type specimens may be sent to other museums or similar institutions for not more than one year. Loans may be extended subject to receipt of a written application not later than one month before the expiration of the initial loan agreement.
- Loan requests will be assessed on their individual merits. The credentials of the borrower, the level of care they can provide for the item and the intended use or display of the item are considered in relation to the importance, monetary value, cultural sensitivity, conservation status and uniqueness of the item.
- All outgoing loans will be processed following the operational guidelines pertaining to loans and tracked using Vernon CMS.
- Any collection item loaned to a third party will include clearly assigned conditions for care, including indemnity/insurance liability.

13.2 Incoming loans

- The Museum will from time to time, for exhibition or research purposes, issue a request to another Museum, institution or individual to loan items for a defined period of time.
- Loans to the Museum will be sought and accepted only in special circumstances, such as where an item has special relevance and can be used immediately for temporary display or research within a finite time period.
- Items on loan will receive the same level of care as Museum collection items and will not be modified or receive conservation treatment without written consent from the owner.

- Items on loan will be processed following the operational guidelines pertaining to loans, assigned a loan item registration number and have a record created in Vernon CMS.
- In special circumstances, the Museum accepts a role to safeguard significant Māori, indigenous or natural science property where ownership cannot be transferred to the Museum. Examples include holding the custody of Crown property, the safekeeping of Taoka Māori, kōiwi takata or other items which are in group ownership. In such cases an agreement will be reached in writing that is signed by the Director, Collections, Research and Education and the relevant parties, clearly identifying responsibilities and timeframes. The Director, Collections, Research and Education will seek approval from the Museum Director in extraordinary circumstances.

14.0 Deaccession and Disposal

By definition, a museum has a long-term purpose and must possess (or intend to acquire) permanent collections in relation to its stated objectives. The Otago Museum Trust Board accepts the principle that there is a strong presumption against the disposal of any items in the Museum's collections except as set out below.

The decision to dispose of an item, whether by exchange, sale, gift or destruction, will be the responsibility of the Otago Museum Trust Board acting on the advice of Museum staff with relevant professional expertise. Such advice will be based on one or more of the following grounds:

- The item is to be repatriated
- The item is to be exchanged¹²
- The item is destroyed or damaged beyond repair
- The item poses a danger or health risk
- The item does not fall within the collections policy
- Full title in the item cannot be established
- The item is proved to be a fake
- The item will be more valuable for increasing knowledge in a particular area through destructive analysis
- The item will be more useful as a service material.

14.1 Procedure for deaccessioning

- A Proposal for Deaccession will be completed, following the Operational Guidelines for Deaccessioning, and signed by the Director, Collections, Research and Education and the Museum Director. It is then submitted to the Otago Museum Trust Board for approval.
- In approving a Proposal for Deaccession, the Otago Museum Trust Board must give serious consideration to the history and context for the decision and its subsequent impact on the collection, along with the recommended process for disposal and its consequences.
- A deaccessioned item may be designated as a non-collection item held for interpretive purposes for use within the Museum and assigned a non-collection item registration number.
- The Vernon CMS record of a deaccessioned item and the documentation related to the deaccessioning process will be permanently retained by the Museum.

¹² On rare occasions items may be deaccessioned in order to be exchanged with other items. These processes more commonly occur within the natural sciences.

14.2 Disposal

- In general, procedures adopted for the disposal of a deaccessioned item will follow the code of practice recommended by *Spectrum 4.0*.¹³
- Appropriate to its context, a deaccessioned item may be returned to the original donor, donated to an alternate museum, sold, exchanged, repatriated or destroyed. A recommended method of disposal will be included with the Proposal for Deaccession, noting the anticipated consequences and responsibilities associated with such action.
- Repatriation of items is at the discretion of the Otago Museum Trust Board, taking into account any conditions that may be attached to the Museum's ownership of the item.
- Items that are considered hazardous will be disposed of following the standards for the type of material and in consultation with regulatory agencies as appropriate.
- Counterfeit items may be destroyed to eliminate the risk of further circulation.
- Any profits derived from the disposal of items will be applied for the benefit of collections.

¹³ McKenna, G & Patsatzi, E (Eds). 2011, *SPECTRUM: The UK Museum Documentation Standard*, MDA, Cambridge, 4th Edition. Pp 88–92.