



OTAGO
MUSEUM

COLLECTION POLICY

2020 - 2025

Policy Information

Policy Title:	Collection Policy
Status:	Approved
Date approved:	June 2021
Last modified:	December 2014
Position responsible:	Director Collections & Research
Due for review (date):	December 2025
Scope/Audience:	Otago Museum Trust Board, Director Otago Museum
Author:	C&R

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, preserve, act as a regional repository for, research, display, and otherwise make available to the people of the present and the future, material and information relating to the natural, cultural and scientific heritage of the peoples of the world, with particular emphasis on those activities as they relate to the greater Otago region, world history, natural history, and science, and, where appropriate, their relationships in a wider global context.¹

There is an estimated 1.5 million items within the collections, held in trust for the benefit of the people of Otago, New Zealand and the world. They 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. Embedded with ancestral spirit and connection, taonga provide a tangible link with our past and are important for relaying our past into the future.

1.0 Definitions

Accession

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

Acquisition

The process of gaining legal possession of an item for a museum collection, through purchase, donation, bequest or transfer.

Bequest

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

¹ Otago Museum Trust Board Act, 1996

Deaccession

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

Digitisation

The conversion of text, pictures, or sound into a digital form that can be processed by a computer.

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.

Education Collection (ED)

Items held by the museum's Education Department for teaching, handling purposes. Owned by the Museum but not part of the accessioned permanent collection.

Item

A generic term that covers museum collection items including documents, pictures, artefacts, specimens, artworks and other objects. Item is also a specific archival term, describing the smallest discrete unit of record material; accumulated items form a record series.

Iwi

Māori tribe.

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

An item owned by the Otago Museum but which is not appropriate to be part of the accessioned permanent collection. A non-collection (NC) 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 item.

Registration

The act of assigning 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 but 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, items of Māori provenance or significance to Māori.

Tikanga

Māori customary practices.

Type Specimen

A type specimen is a zoological, botanical 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 is based.

Voucher Specimen

A voucher specimen is a zoological 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 & Mission Statements²

2.1 Vision

Kia whakaoho – Awaken wonder, curiosity and understanding in our world

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 Otago, New Zealand and the world.
- Integral to its role, the Museum will develop, preserve, research and interpret the collection and promote interest and education in natural, scientific and cultural 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.

² Te Ara Hou, The Road Ahead, Otago Museum Strategic Plan 2019 – 2024

- All collection items will be managed in a culturally appropriate manner with reference to appropriate tikanga and the cultural practices of their source communities
- The Act³ 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 & Guidelines

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

- The Treaty of Waitangi Tiriti o Waitangi
- Kōiwi Tangata: Te Wawata o Ngāi Tahu e pa ana ki Ngā Tāonga Kōiwi o Ngā Tūpuna: The Policy of Ngāi Tahu Concerning the Ancestral remains of our Ancestors, June 1993 (amended 2019)
- Museums Aotearoa, 2013, Code of Ethics and Professional Practice. (www.museumsaotearoa.org.nz)
- Museums Aotearoa, 2020, Code of Ethics Review and Repatriation Addendum (<https://www.museumsaotearoa.org.nz/publications/repository/code-ethics-review-and-repatriation-addendum-2020>)
- ICOM Code of Ethics for Museums, 2017 (<https://icom.museum/wp-content/uploads/2018/07/ICOM-code-En-web.pdf>)
- ICOM Code of Ethics for Natural History Museums, 2013 (<https://icom.museum/en/ressource/icom-code-of-ethics-for-natural-history-museums/>)
- ICOM Checklist on Ethics of Cultural Property Ownership, (https://icom.museum/wp-content/uploads/2018/07/110825_Checklist_print.pdf)
- Museums Association UK, 2017, Code of Ethics for Museums (<https://www.museumsassociation.org/ethics/code-of-ethics>)
- Museums Australia, 2016, National Standards for Australian Museums and Galleries - Version 1.5 (<https://www.amaga.org.au/national-standards-for-australian-museums-and-galleries>)
- Heritage Collections Council, 1998, “reCollections: Caring for Collections across Australia”, Canberra
- Collections Trust, 2017, “SPECTRUM: The UK Museum Documentation Standard”, 5th Edition (<https://collectionstrust.org.uk/spectrum/>)
- 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” (<https://spnhc.org/resources/>)
- Russell, R and Winkworth, K. 2008, “Significance 2.0: a guide to assessing the significance of collections.” Collections Council of Australia. (https://www.arts.gov.au/sites/default/files/significance-2.0.pdf?acsf_files_redirect)
- New Zealand Conservators of Cultural Material Code of Ethics, 1995 (www.nzccm.org.nz/code-of-ethics)
- Artist’s Alliance Code of Practice (www.artistsalliance.org.nz)

³ Otago Museum Trust Board Act, 1996

Legislative Framework

- Arms Legislation Act 2020
- Conservation Management Strategy (<https://www.doc.govt.nz/>)
- Conservation Act 1987
- Convention on International Trade in Endangered Species (CITES)
- Copyright Act 1994
- Historic Places Trust Act 1993
- Heritage New Zealand Pouhere Taonga Act 2014
- 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 2020
- Protected Objects Act 1975
- Public Records Act 2005
- Reserves Act 1977
- Health and Safety at Work Act 2015
- Human Tissue Act 2008 (www.legislation.govt.nz/act/public/2008)
- Protected Objects Act, 1975 (amended 2006) (www.legislation.govt.nz)

Otago Museum Policies, Procedures and Operational Guidelines

- Accidents Involving Items on Display Operational Guidelines
- Otago Museum Strategy - Collection Development 2017 - 2021
- 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 & Collections Care Policy 2020 - 2025
- Preservation Guidelines for Public Presentation of Collection Items
- Proposal for Access
- Proposal for Acquisition
- Proposal for Deaccession
- Management of Wāhi Tapu Operational Guidelines
- Māori Advisory Committee Terms of Reference
- Otago Museum Research Strategy 2021 - 2026
- 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
- Otago Museum - Management and Repatriation of Ancestral Remains Policy 2019 - 2024
- Otago Museum - Indigenous Cultural Property Policy - 2019 - 2024

- Otago Museum – Copyright Licensing Framework – 2019
- Otago Museum Operational Guidelines – Education Collection Management

5.0 Collecting for Whom

The Museum collects for the benefit of the people of Otago, New Zealand and the world.

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 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 programs, events, outreach, social media and online. Given the significance of its collections, the Museum has a responsibility for servicing the needs of national and international visitors onsite and online. The Museum is therefore committed to digitising the collections to facilitate discoverability and access to information for all 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 or their source community's relationship with taoka, 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 in perpetuity zoological, geological, scientific and cultural material. As such the primary spatial focus of the Museum's collections is Otago and Southern New Zealand.

Items from outside Otago will be collected and held primarily when they are necessary for a better understanding of regional phenomena, for comparative natural and cultural diversity 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.

The Museum's collections are not confined by temporal constraints. The collections encompass items from geology to contemporary natural and cultural diversity. Future collecting priorities are identified in the Museums' Collection Development Strategy.⁴

6.2 Contemporary relevance – our 'Reference Library of Life'

It is vital that the Museum maintains an active program of collections development in areas of zoological, geological, scientific and cultural diversity in order to reinforce its position as the key resource of these items in Southern New Zealand. The Museum will

⁴ Otago Museum Strategy - Collection Development 2017 - 2021

work closely with iwi, the University of Otago, the Department of Conservation and others to ensure an ongoing program of relevant collections development.⁵

6.3 Historical significance

The collections of the Otago Museum have steadily grown over the past 150 years and reflect the changing research interests of the Museum since 1868. 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 and cultural approaches emerge that may lead to new discoveries about their nature and our place in the world.

6.4 Research

Collecting to address specific research criteria may also be integrated into core collections. However these items 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.⁶

6.5 Collections Focus

Ever increasing demands 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;

- Natural diversity and representativeness, incorporating;
 - Terrestrial invertebrates
 - Marine invertebrates
 - Parasitology
 - Ornithology
 - Herpetology
 - Mammalogy
 - Ichthyology
 - Geology
 - Palaeontology
 - Botany

- Cultural diversity and representativeness, incorporating;
 - Taoka Māori
 - Taoka Pasifika
 - Artefacts illustrating ethnographic traditions in a global context
 - Localised dress traditions worldwide
 - Decorative arts
 - Antiquities
 - Stamps and postage
 - Medals
 - Numismatics
 - Technology (cameras and firearms)
 - New Zealand History
 - New Zealand Archaeology

⁵ Otago Museum Strategy - Collection Development 2017 - 2021

⁶ Otago Museum Strategy - Collection Development 2017 - 2021

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 relevant Curator.
- In addition to preservation and conservation, the Museum supports reconnecting taoka with their kaitiaki as part of their appropriate care.
- The appropriate tikanga will be applied in the care of taoka.

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, 2017 - 2021⁷.

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, other than those that may apply to cultural obligations to source communities, attached to the item(s).
- The Museum reserves the right to decline any offer of gift to the collection.
- 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.

7.1 Significance

Significance criteria, based on guidelines defined by the Collections Council of Australia⁸, 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.

⁷ Otago Museum Strategy - Collection Development 2017 - 2021

⁸ Russell, R and Winkworth, K. 2008, "Significance 2.0: a guide to assessing the significance of collections." Collections Council of Australia.

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.
- 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.⁹
- No Otago Museum Trust Board member, employee, Honorary Curator, Research Associate, 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, Research Associate, volunteer or their immediate family member may compete for the purchase of an item which 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 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.

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 will maintain relationships with all relevant bodies to avoid collecting conflicts, identify and address gaps in collection activities and develop research collaboration.

⁹ Otago Museum, Collections Access Agreement, Revised 2014

8.3 Ancestral Remains¹⁰

- Ancestral remains are defined as any part of the human body which is in an unmodified natural state since death.
- The Museum does not acquire ancestral remains as part of its contemporary collection development activities.
- Through historical collecting activities, the Museum currently holds ancestral 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 ancestral remains.
- The Museum recognises the cultural, spiritual, scientific and educational importance of the ancestral remains in its care. The Museum accords respect for the dead to all ancestral remains, irrespective of origin, race, religion, nationality, custom and tradition.
- The Museum will be guided by the cultural protocols and relationships of source communities.
- Under special circumstances, following a formal request, the Museum may agree to act as a repository for ancestral remains and will be responsible for their care and protection. They may be registered for management purposes but they will not be accessioned into the collection.

8.3.1 Kōiwi tangata (Māori Ancestral 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.
- Kōiwi tangata will be handled, stored and transported with appropriate tikanga. This includes separate and clearly labelled packing that highlights the contents as sensitive items.
- Access to the kōiwi tangata 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 tangata and will cooperate with iwi for the repatriation of provenanced kōiwi tangata in its care.
- A decision to return any kōiwi tangata 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.

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.

¹⁰ Otago Museum - Management and Repatriation of Ancestral Remains Policy 2019 – 2024

- 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.

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 item.

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 committed to national and international initiatives including the Global Biodiversity Information Facility (GBIF) and Digital NZ.¹¹

- 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 the maintenance of cultural integrity.
- Collections management staff 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'¹².
- Collections are documented and classified using scientific nomenclature, indigenous knowledge and agreed thesauri/ontologies.

11.0 Conservation

The Museum is committed to providing a balance between access to the collections and safely preserving them. The Museum's Conservation and Collections Care Policy¹³ is based on two program streams;

- Preventive,
 - Environmental monitoring,
 - Disaster preparedness,
 - Integrated pest management,
- Collections Treatment Program.

¹¹ www.gbif.org, www.digitalnz.org

¹² Digitisation of Collections Operational Guidelines, revised 2015

¹³ Otago Museum, Conservation and Collections Care Policy, 2015-20.

Collections and Conservation staff are responsible for the day to day care, research and interpretation of collection items, working collaboratively within the Division and across the Museum.

All Museum staff will be made 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.

11.1 Storage and Security

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 within available resources.

- Appropriate storage of collections in environmentally controlled and secure stores is 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.

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.
- In light of staff recommendations, access to the collection will be decided by the Director Collections and Research 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 and Research will seek approval from the Museum Director for extraordinary requests.
- Access to the collection may be restricted or denied for items that;
 - Are fragile or at high risk of deterioration,
 - 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 with 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 Reference'¹⁴, and following established operational procedures.
- Māori ritual practices, including cultural restrictions such as tapu and noa, must be observed.

¹⁴ Māori Advisory Committee Terms of Reference

- Handling, storage, packing and transport must be appropriate to the character and associated values of the taoka.

12.1 Destructive sampling

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

- Proposals for destructive sampling of collection items require approval from the Director Collections and Research and the Museum Director. The sampling of items of high significance such as Holotypes will also be subject to the approval of the Museum Board. The damage caused to the item by sampling versus the benefit of the results to the Museum must be carefully considered.
- Researchers conducting destructive sampling are required to sign the 'Otago Museum Destructive Sampling Agreement' and staff will follow the 'Destructive Sampling Operational Guidelines' in the processing and completion of such a request if approved.
- Only bona fide researchers with demonstrated experience will be supplied with material for destructive research. Such workers may, however, supervise a junior colleague or student in carrying out the research.
- 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

Any temporary movement of collection items to or from the Museum to or from a third party is regarded as a loan for a finite period of time and the appropriate loan procedure must be implemented. All outgoing and incoming loans must be approved by the Director Collections and Research in consultation with relevant Collections, Conservation and Research staff. The Director Collections and Research will seek approval from the Museum Director in exceptional circumstances.

13.1 Outgoing 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.
- 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.
- Any Loans of taoka Māori or items from other source communities are subject to the approval of the appropriate curator and MAC.

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 tangata 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 and Research and the relevant parties, clearly identifying responsibilities and timeframes. The Director Collections and Research 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 exchanged,¹⁵
- 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 accessioned items

- A 'Proposal for Deaccession' will be completed following the 'Operational Guidelines for Deaccessioning' and signed by the Director Collections and Research and the

¹⁵ On rare occasions items may be deaccessioned in order to be exchanged with other items. These practices more commonly occur within the natural sciences.

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.

14.2 Disposal

- In general procedures adopted for the disposal of a deaccessioned item will follow the code of practice recommended by 'Spectrum 5.0'¹⁶
- 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/hazard and in consultation with regulatory agencies as appropriate.
- Counterfeit items may be destroyed to eliminate the risk of further circulation.
- In line with the code of practice recommended by 'Spectrum 5.0', the sale of an item may only proceed if all other avenues of disposal have been exhausted. Any profits derived from the disposal of items will be applied for the benefit of collections.

¹⁶ Collections Trust, 2017, "SPECTRUM: The UK Museum Documentation Standard", 5th Edition, Deaccessioning & Disposal.