

# **OTAGO SETTLERS MUSEUM COLLECTION MANAGEMENT POLICY**

## **INTRODUCTION**

The collections of the Otago Settlers Museum are owned by the Dunedin City Council, which has a duty to maintain, protect and preserve them.

This policy should be read in relation to the Museum's strategic and annual plan.

## **ACQUISITION POLICY**

- 1.1 That it be generally policy to acquire items of cultural property which will enhance the collection as a resource for the programmes of the Museum.
- 1.2 Items of cultural property for acquisition should be considered on their respective merits and in relation to the aims and bounds of this policy. Objects outside the bounds of this policy may be considered only in special circumstances.
- 1.3 Items of cultural property considered for acquisition should be considered in the context of the collection policies of other Dunedin institutions collecting in similar fields, for example the Hocken Library, Otago Museum and Dunedin Public Art Gallery
- 1.4 Where the Museum has a good collection of a certain category of objects, and where there are specific gaps in that collection which could be usefully filled by specific acquisitions, then the Museum should attempt to make such acquisitions as the opportunity arises.
- 1.5 The Museum must obtain legal title for the items it acquires by purchase, gift or bequest.
- 1.6 The acquisition of any item for the collection must not contravene the requirements of New Zealand law, or any international agreements to which New Zealand is a party, or the UNESCO conventions relating to cultural property.
- 1.7 The ability of the Museum to care for, store, and exhibit a potential acquisition should be thoroughly considered as part of the acquisition process. The potential long-term cost to the Museum in terms of conservation, storage and display facilities should be a major part of this consideration. If the Museum is unable to provide adequate care, storage and display for an object under consideration, then it should not be acquired.
- 1.8 Items of cultural property of the types collected by the Museum which are acquired privately by members of Museum staff must be declared to the Director immediately following purchase. The Museum shall have the option of purchasing such works at cost within four weeks of the date on which the Director was notified of the purchase. Staff members should not compete with the institution in the acquisition of items of cultural property.

- 1.9 The Museum should try to ensure that items of cultural property receive appropriate spiritual as well as physical care.
- 1.10 The Museum's policy is to collect items of cultural property that meet the following selection criteria:
- a) The item is directly related to a person, group or event in the history of Otago or Dunedin, that is:
    - i. items which belonged to a person born in or active in Otago or Dunedin;
    - ii. items created in Otago or Dunedin or created by a person born or active in Otago or Dunedin;
    - iii. items used in an event or created to commemorate an event in the history of Otago or Dunedin.
  - b) The item is relevant to the history of the peoples of Otago or Dunedin.
  - c) The item is indirectly related to the history of Otago or Dunedin. That is:
    - i. items which belonged to or were created by a person born in Otago or Dunedin but active elsewhere
    - ii. items which reflect nationwide or worldwide trends, or
    - iii. events which have had marked impact upon people in Otago or Dunedin.
- and
- d) The item has value as part of a series or group existing in the collection.
  - e) The item has value as being unique or exceptionally rare.
  - f) The item is in fair condition relative to its importance.
  - g) Items which are well-provenanced and supported by documentation will be accepted in preference to similar items without any provenance.

## **GIFTS AND BEQUESTS POLICY**

- 2.1 The Museum, on the recommendation of the Director, is entitled to accept any gift or bequest confirming with the Acquisitions Policy, or outside the policy, but is not bound to accept any gift or bequest.
- 2.2 The Museum shall not be bound to display any item acquired by gift or bequest.
- 2.3 The donor of an item must have legal title to the item in order to give or bequeath it to the Museum.
- 2.4 Gifts and bequests should be unrestricted, although the acceptance of gifts and bequests with restrictions may be considered by the Director in special circumstances.
- 2.5 The Museum is obliged to take into serious consideration any precatory restrictions placed on gifts and bequests.

- 2.6 The Museum has the exclusive right to dispose, however and whenever it sees fit, of any object or work of art acquired by any means, with the sole constraint that any funds arising from such disposal may only be applied to the acquisition of further items for the collection. It however has a procedure for making disposals described under that heading in this document.

### **LONG TERM LOANS TO THE MUSEUM**

- 3.1 Items of cultural property acquired on long-term loan should fall within the bounds of the Acquisitions Policy. Acceptance of long-term loans for any other reasons may be considered in special circumstances.
- 3.2 The Museum shall not knowingly hold on long-term loan any item vested with it by anyone in contravention of the requirements of New Zealand law, or any international agreements to which New Zealand is a party or the UNESCO conventions relating to cultural property.
- 3.3 No item may be held on long-term loan which the Museum is not able to care for, store, catalogue and display adequately.
- 3.4 Items on long-term loan to the Museum will be cared for in accordance with the wishes of the owner to the best of the Museum's ability.

### **SHORT-TERM LOANS TO THE MUSEUM**

- 4.1 Short-term loans may be made for exhibition or public programmes, or for curatorial or conservation assessment. Short-term loans for other purposes may be made in special circumstances.
- 4.2 The Museum shall not knowingly hold on short-term loan any object or work of art acquired by the owner in contravention of the requirements of New Zealand law, or any international agreements to which New Zealand is a party, or the UNESCO conventions relating to cultural property.
- 4.3 No item of cultural property shall be held on short-term loan which the Museum is not able to care for, store, catalogue and display adequately.
- 4.4 Items of cultural property on short-term loan will be cared for in accordance with the wishes of the owner to the best of the Museum's ability.

### **ACCESS TO AND USE OF COLLECTIONS**

- 5.1 The Museum staff will make reasonable efforts to make items of cultural property in the collection (and information about these items) accessible. However, access must not compromise the security or conservation needs of an item, nor the copyright restrictions placed on it.
- 5.2 Use of the collections should be consistent with the aims, responsibilities and policies of the Museum.

- 5.3 The Museum encourages research into items of cultural property in its collection.

## **OUTGOING LOAN POLICY**

- 6.1 Every effort shall be made to make objects in the collection available for loan. However:
- The loan of an object must not compromise its security or conservation needs, nor any other specific restrictions place on it.
  - Loans shall be made only if the borrower is able to care for, store and display the object properly.
  - Loans should be for purposes consistent with the aims, responsibilities and policies of the Museum.
- 6.2 The borrower must adhere to the conditions set out on the Museum's Outgoing Loan Agreement.
- 6.3 Works held on long-term loan by the Museum may only be lent to another party with the approval of the owner.

## **DISPOSAL POLICY**

- 7.1 The Museum must establish that it has legal title to any item of cultural property it wishes to dispose of.
- 7.2 Disposal is to be used as a collection management tool to improve the quality and usefulness of the collection. It is unacceptable to dispose of an item of cultural property in response to current vogues or from personal whim.
- 7.3 In disposing of an object a recognised authority in the relevant field must have signed a written opinion agreeing to the disposal.
- 7.4 Issues to be taken into consideration with regard to the disposal of objects (not in order of priority):
- Means of acquisition
  - Curatorial priority
  - Conformity to Acquisitions Policy
  - Usefulness to the exhibitions programme
  - Educational value
  - Number of similar works in the collection
  - Amount of storage space needed
  - Conservation needs
  - Resources needed to maintain the work
  - Value as a potential outgoing loan
  - Objects accidentally lost or stolen may be deaccessioned

7.5 Means by which items of cultural property can be disposed of:

- Offered first to any other relevant public institution in Dunedin, either as a gift or for sale.
- Offered to any other relevant public institution outside Dunedin, either as a gift or for sale.
- Offered anonymously at public auction with a reserve set to reflect its market price. Thereafter anonymously at public auction wherever the highest price may be obtained.

The Director will recommend to the Museum Board the most appropriate means of disposal in each case.

7.6 The disposal of an item of cultural property shall not knowingly contravene the requirements of New Zealand law, or any international agreements to which New Zealand is a party, or the UNESCO conventions relating to cultural property.

7.7 Where financial assistance has been obtained for an acquisition from an outside source, as a matter of etiquette but not as a matter of right, the Director should consult such parties, before deciding to dispose of the work.

7.8 If an item of cultural property significant to any ethnic, religious or family group is to be deaccessioned, as a matter of etiquette but not as a matter of right, the Director should seek advice on the appropriate protocols and follow them as far as possible.

7.9 Full records must be kept of all decisions and procedures concerning disposal.

7.10 Funds arising from the sale of collection items are to be used solely for the purchase of further items of cultural property for the collection.

## **EXHIBITION POLICY**

8.1 That it be general policy to conduct an exhibition programme consistent with the aims, responsibilities and policies of the Museum

8.2 All objects on exhibition will be properly credited on labels or by other means.

8.3 Reasonable measures will be taken to ensure that items of cultural property on exhibition are not stolen, intentionally destroyed, distorted or altered.

8.4 The Museum will not offer for sale any objects on exhibition

8.5 Objects on exhibition should be contextualised responsibly with due consideration given to:

- the circumstances in which the object was created;
- the object's intended use at the time of creation;

- spiritual value placed on the object by any group or groups within the community.
- 8.6 Items of cultural property in the collection or borrowed for the purposes of exhibition shall not be put at risk by time constraints imposed by exhibition schedules and deadlines. Exhibition schedules and deadlines should be determined by the physical requirements of the items of cultural property to be displayed, to ensure safety in handling and installation.

## **HANDLING POLICY**

- 9.1 Correct and careful handling of all items of cultural property is critical for the professional operation of the Museum and for the preservation of the objects in the collection or on loan.
- 9.2 All items of cultural property in the collection and on loan must be considered worthy of the same amount of care in handling irrespective of monetary value or the aesthetic or cultural values the handler may place upon them.
- 9.3 While collection management and exhibition staff will normally be responsible for the handling of items of cultural property, all members of staff have a responsibility in this, and need to be aware of correct procedures.
- 9.4 Procedures for handling items of cultural property will be prescribed by a conservator. Advice on specific handling problems will be sought from time to time from specialist conservators as the need arises.
- 9.5 Damage to and loss of items of cultural property must be reported to the Director as soon as practicable after the event. While it may be necessary in some cases to report the damage/loss to the Collection Manager first if urgent action needs to be taken, the Director must be informed immediately afterwards if he/she is on the premises, and in any case not more than 24 hours after the event, in writing.

## **ACQUISITION PROCEDURES**

- 10.1 Items on offer as gifts, bequests, or proposals for purchase shall normally be presented to the relevant curator. The curator will deposit the item/s with collection management staff and in due course complete a recommendation for each item. The final decision on acquisitions is made by the Director and Collection Manager.
- 10.2 In buying items of cultural property outside an auction or proper tendering process the Museum never stipulates a price.
- 10.3 In buying items at auction the Museum acts anonymously.

## **PROCEDURES FOR LONG-TERM LOANS TO THE MUSEUM**

- 11.1 The Director must approve all long-term loans to the Museum.
- 11.2 Where the lender does not provide a suitable outgoing loan agreement, the lender must agree to the terms of the Museum's Incoming Loan Agreement, and must sign and return this agreement. Any restrictions placed on the loan must be clearly stated on any loan agreement.
- 11.3 All long-term loans will be reviewed after a period of five years.
- 11.4 The Registrar will formally catalogue the loan.

## **PROCEDURES FOR SHORT-TERM LOANS TO THE MUSEUM**

### **Loans for exhibitions or public programmes**

- 12.1 Requests for loans are made by the Curator (or by the Registrar on his/her behalf), on approval by the Director.
- 12.2 Where the lender does not provide a suitable outgoing loan agreement, the lender must agree to the terms of the Museum's Incoming Loan Agreement, and must sign and return this agreement. Any restrictions placed on the loan must be clearly stated on any loan agreement.
- 12.3 Loans will be returned to the owners as soon as practicable after the close of an exhibition or public programme.
- 12.4 The Registrar will enter the loans in the Loans Register.

### **Loans for other purposes**

- 12.5 In the case of loans to the Museum for other purposes, and where the lender does not provide a suitable outgoing loan agreement, the lender must agree to the terms of the Museum's Incoming Loan Agreement, and must sign and return this agreement. Any restrictions placed on the loan must be clearly stated on any loan agreement.
- 12.6 The Registrar will enter the loans in the Loans Register.

## **PROCEDURES FOR ACCESS TO AND USE OF THE COLLECTION**

- 13.1 The Director must approve all access to and use of the collection if it is for monetary gain.
- 13.2 The Director or his/her delegate must approve and supervise all other access to and use of the collection.
- 13.3 The Director may impose charges for access to or use of the collection. Generally charges will only be made to recover costs incurred by the Museum in making a service available.

## **PROCEDURES FOR OUTGOING LOANS**

- 14.1 Outgoing loans must be approved by the Director, after consultation with the Curators, Collections Manager, and Exhibition Manager.
- 14.2 The borrower must agree to the terms and conditions of the Museum's Outgoing Loan Agreement, and must sign and return it.
- 14.3 All long-term outgoing loans will be reviewed after a period of three years.

## **DISPOSAL PROCEDURES**

- 15.1 Issues to be taken into consideration with regard to the disposal of collection items (not in order of priority) are :
  - Means of acquisition
  - Curatorial priority
  - Conformity to Acquisitions Policy
  - Usefulness to the exhibitions programme
  - Educational value
  - Number of similar works in the collection
  - Amount of storage space needed
  - Conservation needs
  - Resources needed to maintain the work
  - Value as a potential outgoing loan
  - Objects accidentally lost or stolen may be deaccessioned.
- 15.2 Where financial assistance has been obtained for an acquisition from an outside source, as a matter of etiquette but not as a matter of right, the Director should consult such parties, before deciding to dispose of the work.
- 15.3 If a collection item significant to any ethnic, religious or family group is to be deaccessioned, as a matter of etiquette but not as a matter of right, the Director should seek advice on the appropriate protocols and follow them as far as possible.
- 15.4 The Museum must establish that it has legal title to any item it wishes to dispose of. The Director must sight the relevant documents of its acquisition.
- 15.5 The Director, Collection Manager and the Museum's curators will identify and agree items for disposal and the Director will make recommendations regarding disposal to the Board for a final decision.
- 15.6 In disposing of a collection item a recognised authority in the relevant field must have signed a release agreeing to the disposal.



15.7 Means by which collection items can be disposed of:

- Offered first to any other relevant public institution in Dunedin, either as a gift or for sale.
- Offered to any other relevant public institution outside Dunedin, either as a gift or for sale.
- Offered anonymously at public auction with a reserve set to reflect its market price. Thereafter anonymously at public auction wherever the highest price may be obtained.

The Director will recommend to the Museum Board the most appropriate means of disposal in each case.

15.8 Full records must be kept of all decisions and procedures concerning disposal.

## **APPENDIX**

### **Nomenclature**

- i) 'Item of cultural property' is used to mean something made or modified by people.
- ii) 'To acquire' is used to mean 'to gain legal title to'; 'acquisition' is the corresponding noun.
- iii) 'To dispose of' means 'to decide to surrender legal title to'; 'disposal' is the corresponding noun.