



## COLLECTION POLICY

Collecting is at the heart of the Witte Museum's mission and must be done with clear purpose and well-articulated guidelines. The museum's Collection Plan provides the guidelines for what the museum will collect. The Collection Policy sets forth the professional standards and responsibilities for the care and management of collections as required of an accredited museum. The Collections Department Procedures Manual covers procedures for implementing this policy.

This policy should be reviewed every five years or as necessary to reflect changes in staff, strategic plan, Collection Plan, or museum practices at large.

### **I. MISSION Statement**

The Witte Museum promotes lifelong learning through innovative exhibitions, programs, and collections in natural history, science, and South Texas heritage

### **II. VISION STATEMENT**

Through innovative programs in history, science, and culture the Witte Museum enriches lives, promotes a quality of life for all South Texas people and generates a legacy of knowledge.

### **III. VALUES**

- Learning organization
- Collection Stewardship
- Quality programs and exhibitions
- Fiscal stability
- Environmental stewardship
- Professional ethic
- Welcoming environment

#### IV. TYPES OF COLLECTIONS

The Witte Museum possesses five types of collections: Accessioned, Library, Research, Living, and Educational. The Witte shall designate at the time of acquisition the collection category to which material is assigned. The assigned category may change as the priorities and collections of the Witte evolve.

##### *Accessioned Collections*

Items in the Accessioned Collections shall relate directly to the Mission Statement of the Witte and shall be used solely for exhibitions, research, publications, exhibition loans, education, and Witte branding and merchandising. The documentation, care and disposition of accessioned items are governed by this policy and museum best practices.

##### *Reference Library Collection*

Items in Reference Library Collection are part of a non-circulating library and are not considered part of the Witte's accessioned collections. The collection includes publications accessible to the public in the San Antonio Express-News Reading Room. These publications include subjects related to the accessioned collection, museology, and preservation. Items in this collection are not subject to the restrictions and standard of care afforded the accessioned collection. Records of their receipt and disposition will be maintained.

##### *Research Collection*

Items in the Research Collection are not part of the accessioned collection. The collection includes items that do not meet the criteria established in the Collection Plan but have value to areas of curatorial research. Records of their receipt and disposition will be maintained.

##### *Living Collection*

Items in the Living Collection are not part of the Witte's accessioned collection. The collection may include reptiles, amphibians, fish and invertebrates native to Texas, for which the Witte has the appropriate permit(s). The collection is used for exhibition and educational programs. Records of their receipt and disposition will be maintained.

##### *Education Collection*

Items designated to this category are not part of the Witte's accessioned collection and are used for education purposes. Records of their receipt and disposition shall be maintained by the Public Programs Department. The Education Collection may include, but is not limited to, props, models, and reproductions used for education and exhibition purposes, as well as materials for the reference library. Items in this collection are not subject to the restrictions and standard of care afforded the accessioned collection.

## **V. SCOPE OF COLLECTIONS**

The Witte's Collection Plan serves as a road map for staff, museum consultants, and trustees to make informed decisions regarding accessioning and deaccessioning. In providing a guideline for such decisions, the museum staff and trustees recognize the importance of a consistent policy for collecting and believe that the collections will be strengthened by the application of a consistent set of guidelines as formulated in the Collection Plan.

The Witte's collections include artifacts from the following areas as outlined in the Collection Plan:

- Natural History
- Paleontology and Geology
- Texas History
- American History
- World History
- Military History
- Anthropology
- Texas Art
- Institutional Archives

## **VI. ACCESSIONED COLLECTION**

### **A. Acquisitions for Accessioned Collection**

The Witte Museum shall acquire objects and specimens for the accessioned collection through gift, bequest, purchase, exchange, field collection, or any other transaction by which title to items is transferred to the Witte.

Only those items that meet the mission, goals, and Collection Plan will be accepted into the accessioned collection. The museum will not accession items with the intention of deaccessioning them.

All accessioned collection acquisitions (except field collections) must be presented to the Collections Committee, comprised of the Collection and Curatorial staff, the President and CEO, members of the Board of Trustees, and other members of the community as needed. The Committee makes recommendations for acceptance to the Board of Trustees. Only when the Board has approved the recommendations, will the accessioning process begin.

Once the item has been approved for acquisition a deed of gift will be sent with confirmation of delivery. If a deed of gift has not been signed and returned to the museum within 60 days, the transfer of title to the museum will be deemed complete if all three of the following provisions have been fulfilled:

- Offer of the item as a gift has been approved by the Collections Committee and Board of Trustees
- The museum has physical custody of the item

- An acknowledgement letter has been sent to the donor.

Once title to an item has been transferred to the Museum, the Registrar's office begins the process of accessioning creating a permanent documentary record of an addition to the museum's collection. An annual report of all accessions will be provided to the Board at the end of the fiscal year.

### **1. Considerations for Acquisitions**

If the Witte Museum is offered or becomes interested in acquiring certain items for its accessioned collection, the following should be considered:

- Is the item consistent with the mission and goals of the Witte Museum?
- Does the item fit within the museum's Collection Plan?
- Can proper care be given to the item or will it require additional expense for conservation and maintenance?
- Is it intended that this item become a part of the collection for as long as it remains useful for the purposes of the museum?
- Is the item encumbered with restrictions imposed by the donor?
- If the item is being offered for sale, might it or a comparable item be obtained as a gift or bequest?
- Can valid title to the item be conveyed to the museum?
- Is acquisition of the item consistent with all applicable state, national, or international laws (e.g. NAGPRA, CITES) or conventions protecting the rights of artists, cultural patrimony, or endangered species?
- Has the Senior Management Team reviewed the acquisition for presentation to the Collections Committee?

### **2. Authority to Acquire**

The President and CEO may delegate authority to the curatorial staff to purchase items within the limits set by the Collection Plan. No staff member may obligate the museum to the purchase of any item not in keeping with the mission, goals, or Collection Plan of the Witte Museum without written permission of the Collections Committee. Under extraordinary circumstances if the Collections Committee cannot be timely convened, the President and CEO may exercise this authority without Collections Committee approval.

### **3. Rights of Refusal**

The Witte Museum has the right to refuse items if:

- It is known that the collecting of said objects/specimens involved the illegal destruction of historical or archaeological sites, or harmed endangered or protected species/habitats.
- They are known to have been collected or transported illegally from their country of origin.
- Restrictions are placed on their use or disposal.

- They are not consistent with the Collection Plan of the Witte Museum.

#### **4. Means of Acquisition**

##### *Gift*

Additions to the accessioned collection shall be approved by a majority vote at a Board of Trustees meeting. Any and all encumbrances shall be stated clearly in an instrument of conveyance, shall be made part of the Witte's accessioned record, and shall be observed by the Witte. In the absence of an indication to the contrary, the Witte shall assume that all donors are sole owners and shall have no responsibility for confirming ownership.

##### *Promised Gift*

A Promised Gift follows the same approval process as outlined above. The exception is that the physical custody and legal title to the gift is conveyed at a future date of the donor's choosing during their lifetime or at the time of their death.

##### *Bequest*

The Witte reserves the right to accept or refuse any bequest of collection material, or any part thereof, made to it. In reviewing a bequest, the Witte shall follow the same policy as for donation.

##### *Purchase*

With the prior approval of the President and CEO and the Chair of the Collections Committee, purchases for the collection of up to a total of \$50,000 may be made without Board approval provided there are no encumbrances upon the proposed purchase. Such purchases shall be reported to the Board at the next meeting. The Board of Trustees shall approve in advance all other purchases by majority vote.

##### *Exchange*

To enhance the collections, at the recommendation of curatorial staff, the Board may authorize the exchange of items in the collection for materials deemed to be in the best interest of the Witte or as otherwise appropriate. Such exchanges are limited to institutions recognized by the state or federal government and are exclusively for the purposes of research, education, or exhibition. The terms of an exchange shall be set forth in writing and all relevant documents shall become part of the Registrar's accession files.

##### *Field Collection*

With the approval of the President and CEO, curatorial staff may acquire field collections. Field collections must be reported to the Registrar's Department and the Collections Committee as they come into the museum and go through the standard accessioning process.

## **B. Found in Collections and Abandoned Property**

Items that are in the museum's possession that are not supported by any documentation or sufficient evidence to prove museum ownership shall be handled through the following process:

### *Assign a temporary number*

Temporary numbers beginning with the prefix FIC followed by a sequential number will be assigned allowing the item to be documented.

### *Documentation*

The date the item was found, its location, condition, measurements, physical description shall be noted, and item photographed.

### *Determine Status*

Staff shall consult museum records to determine the status of the object. The following list of resources may provide relevant information:

- Accession, loan and exhibit files
- Inventories
- Collections Committee and Board of Trustees minutes, annual reports
- Newsletters and newspaper articles
- Current and former staff members who may recall the object

### *Gain Clear Title*

If clear title to the object cannot be determined by a thorough review of the resources listed above, the museum will follow the provisions of Chapter 80 of the Property Code of the State of Texas and other applicable statutes to gain legal title. If the item is deemed to be a hazard to the collection or the people who care for it, it may be disposed of immediately.

### *Disposition*

Once clear title to an item has been established the museum may

- Accession it to the accessioned collection
- Add it to the Teaching or Education Collection
- Remove it from the museum's possession following the same procedures used for deaccessioning.

## **C. Preservation**

The museum strives to preserve the collections in its care and limit deterioration by mitigating risk and using preventative conservation. Strategies for preserving the collection include:

- Monitoring and regulating the museum environment
- Integrated pest management
- Proper storage

- Safe handling and moving
- Safe exhibition techniques
- Proper documentation
- An Emergency and Disaster Plan

#### **D. Inventory**

The accessioned collection and items on loan to the Witte Museum shall be inventoried on a rotating basis or as needed. The Collections Department will develop a schedule of inventories to ensure that all items will be inventoried and an accurate record kept of location. Random spot checks of selected items shall be conducted regularly.

#### **E. Access to Collection**

The Witte Museum provides access to its collections through exhibition, open storage, educational programs, publications, visual resources, and collection records. Access to the collection is at the discretion of the President and CEO, Collections Manager, Curator, or designated staff member. The museum seeks to balance its preservation goals with the use of the collection for exhibition, education, and research purposes.

Requests for access to the collection must take into consideration:

- Risk to the object
- Location
- Security
- Intended use
- Copyright/Artist's rights
- Human and financial resources available

##### *Physical Access*

Access to non-public areas of the museum is restricted and visitors will be escorted and observed by appropriate staff members at all times. Individuals requesting access must state the purpose of their inquiry. Access will be limited to legitimate and legal inquiry and will be granted by appointment only.

##### *Records Access*

All catalog, accession, and archival records will be treated as public information within the following restrictions:

- Requests for anonymity by donors and lenders will be honored.
- Individuals requesting access to records must state the purpose of their inquiry. Access will be limited to legitimate and legal inquiries.

##### *Photography, Film, & Video*

Requests to reproduce images of items in the collection or intellectual property created by the Museum such as exhibitions or publications in print, film, or electronic media are handled by the Collections Department. Reproductions of works of art or images in the Witte Museum collection may not be cropped, flipped, enlarged, or

edited in any way without specific written permission. The reproduction of any image is limited to what has been specifically approved in the written agreement. Fees for providing reproduction images and their use will be charged in accordance with the Museum's fee schedule.

Unless otherwise posted visitor photography is permitted within the following restrictions:

- Tripods or other equipment to steady a camera may not be used.
- Additional lighting may not be used.
- Images are for personal or educational use only. Images may not be sold or used for personal gain.

Requests for photography and filming for news or promotional purposes should be addressed to the Communications Department. When these requests involve collection items, the Collections Department shall be consulted.

## **F. Deaccessioning**

Deaccessioning is the formal process used to legally and permanently remove an object from the collection. The Witte Museum may deaccession items not in keeping with its mission, goals and Collection Plan. Donated items must have been a part of the museum's collection for a minimum of three years before deaccessioning can be considered. Deaccessioning shall not be initiated for the sole purpose of acquiring funds. All items selected for deaccessioning must be reviewed by the Collections Committee and will go through the same internal review and approval process required for acquisitions. The committee will make recommendations to the Board of Trustees for approval.

Exempted from committee and board approval are:

- Items that pose a serious and immediate threat to the collection due to inherent vice or vermin
- Items that are in such a condition that repair or restoration is not possible

All items exempted from approval, must be reported to the Board of Trustees.

### **1. Criteria for Deaccessioning**

Objects or specimens considered for deaccessioning must meet at least one of the following criteria:

- It is not in keeping with the mission, goals, and Collection Plan of the Witte Museum.
- It is not useful for research, exhibition, or educational programs in the foreseeable future.
- Its condition prevents its use or poses a threat to other items in the collection or the people who care for them.

- It cannot be adequately stored or cared for.
- It is a duplicate or there are better examples of identical or similar items in the collection.
- It lacks authenticity or is so lacking in documentation that its value for scholarship or public education is compromised.
- Deaccessioning and repatriation are required in fulfillment of the requirements of the Native American Graves Protection and Repatriation Act (NAGPRA) and any other relevant governmental laws or acts.

Any item for which a possible encumbrance exists, such as donor restrictions, state or federal regulations, or lack of clear title, shall be referred to legal counsel.

## **2. Procedure for Deaccessioning**

### *Documentation*

Items must be recommended by the curatorial staff that will provide written justification based on the criteria for deaccessioning and approved by the President and CEO and the Chief Curator. In cases where the approval of the Collections Committee and the Board of Trustees is required, approval shall be reflected in the respective minutes. Copies of all documentation shall be retained by the Registrar's office for inclusion in the permanent accession files. A complete and open file of all deaccessioned material shall be maintained by the Witte and an annual report will be compiled by the Registrar's office for distribution to the Collection Committee and Board at the end of the fiscal year.

### *Donor Relations*

The Witte Museum will attempt to contact the donor at the last known address, or their heir(s), if they can be determined, to advise them of the intent to deaccession or to notify them of action that has been taken in the case of items posing a serious and immediate threat due to inherent vice or vermin. Deaccessioned items will not be returned to donors or their heirs. Once an item has been donated to the museum it is held in trust for the people of the State of Texas. Once an item has entered into the public trust the museum has a responsibility to keep that item in the public trust if possible. However, if the item(s) is offered for public sale the donor shall not be precluded from purchasing the item(s) at the current fair market or appraised value.

## **3. Methods of Disposal**

In deaccessioning, the Witte shall give preference to retaining in the State of Texas or the United States any material that is part of the artistic, historical, cultural, technological or scientific heritage.

#### *Transfer to Education or Expendable Collection*

Deaccessioned items may be transferred to the Education/Programs Department, or the Expendable collection within each curatorial area, for use in public programs.

#### *Exchange*

If an item is of unusual cultural or scientific value, the preferred method of disposal may be by exchange with another institution whose collections might benefit from the addition of the item. An exchange may be arranged if an institution has items of equivalent value that are appropriate to the Witte Museum's collecting plan.

#### *Donation or Transfer*

Where exchange of material is not feasible, the Museum may donate the deaccessioned items to other non-profit educational or scientific institutions. Such transfers are limited to institutions recognized by the state or federal government and are exclusively for the purposes of research, education, or exhibition. Should there be competing institutions the Witte shall consider the best interests of the item in making its decision.

#### *Sale*

Deaccessioned items may be sold. The goal of the sale is to realize the best possible profit for the museum within the boundaries of board-approved policy. The preferred type of sale, whenever an appropriate price can be obtained, is to another museum or similar nonprofit institution where the item will continue to be held for the benefit of the public. If this is not possible, then the sale should be by public auction or to the public market in a manner that will best protect the interests, objectives, and legal status of the museum. No Witte Museum employee or trustee may directly purchase deaccessioned items. The Museum will not sell any items that might appear to support illegal marketing or trading.

#### *Destruction*

Destruction is defined as the final disposal of an item by physical or mechanical means, including destructive analysis. Deaccessioned items designated for destruction must in fact be destroyed and not kept by staff members or given away.

### **4. Application of Proceeds**

After costs associated with deaccessioning and sale have been deducted from the revenue, all monies received from the sale of deaccessioned items shall be placed in a fund restricted for direct care of the collection or costs associated with acquisitions for the accessioned collection. Proceeds from the sale of deaccessioned items shall never be applied toward salaries, general operating expenses, or capital improvements. When an item has been deaccessioned and

objects have been received in exchange, the Witte shall acknowledge the original donor's name in association with the newly-acquired material, when practical.

Criteria for determining if the application of proceeds represents direct care is defined by the white paper *Direct Care of Collections: Ethics, Guidelines and Recommendations* published by the American Alliance of Museums in 2016:

- Will this expenditure enhance the life, usefulness or quality of the accessioned artifact?
- Is this a strategic decision based on the museum mission, collection plan, or conservation assessment?
- Will the expenditure have a physical impact on the condition of an item(s) in the collection rather than benefit the operation of the entire museum?
- Is this decision being made without pressure resulting from financial distress at the museum's operating budget?
- Is this a cost that is not normally considered part of the museum's operating budget?
- Can this decision be clearly explained to the museum's stakeholders and the public?

## **5. Repatriation**

The policy of the Witte Museum is to collect, care for, and interpret archaeological and ethnographic materials in a manner that respects the diversity of human cultures and spiritual beliefs. It is the Museum's intent and policy to comply with all applicable laws, treaties, and international conventions ratified by the United States of America. Requests for repatriation will be considered on a case-by-case basis in accordance with the established process with consideration for the museum's legal, fiduciary, and ethical responsibilities. The Museum will not release any collection for reburial or for any other purpose which removes it from the public trust until it has been fully documented by the appropriate museum staff.

## **6. Forgeries**

Deaccessioning of an object determined to be a forgery requires special consideration. Whatever disposition is made of the object, care must be taken to identify the forged work for what it is and to provide the most accurate identification possible in order to preclude further misrepresentation.

## **G. Object Return / National Patrimony**

The policy of the Witte Museum is to collect, care for, and interpret archaeological and ethnographic materials in a manner that respects the diversity of human cultures and spiritual beliefs. It is the Museum's intent and policy to comply with all applicable laws, treaties, and international conventions ratified by the United States of America. Requests for

repatriation will be considered on a case-by-case basis in accordance with the established process with consideration for the museum's legal, fiduciary, and ethical responsibilities.

## **H. Loans**

The Witte Museum will accept and initiate loans only from or to institutions and organizations for purposes consistent with the goals of the Witte. Only the President and CEO, and the Curatorial, and Collections staff of the Witte has the authority to negotiate loans.

### **1. Incoming Loans**

Loans from individuals will be accepted only for exhibition or study purposes. The Witte shall not accept loans for storage. Only the President and CEO, and the Curatorial, and Collections staff of the Witte has the authority to accept incoming loan items.

Criteria:

- The loan is in the best interests of the Witte Museum, the public it serves, and the public trust it represents in owning the collections.
- All risks of damage and loss must be justified by the merits of the loan.

### **2. Outgoing Loans**

The Witte reserves the right to specify the conditions under which a loan is granted. All loans shall be reported to the Collections Committee and the Board. The President and CEO shall have the authority to approve loans based on the recommendation of the Chief Curator and the appropriate curator for that collection area. Outgoing loans are also reviewed by the Senior Management Team.

Criteria:

- The borrowing institution is represented by staff properly trained in collection care.
- The item(s) to be loaned is/are not needed by Witte staff for research or exhibition during the loan period.
- Trained staff exists to ensure proper handling of the loaned items. In the absence of trained staff, a designated Witte staff member may accompany the loan and an hourly fee may be charged for this service.
- The items requested are not exceptionally fragile or rare.
- The institution requesting the loan will honor future loan requests from the Witte.
- The borrowing institution has adequate facilities for the loan item(s) to ensure proper storage, handling, security, and a controlled environment.

### **3. Documentation**

The loan of collection items is undertaken only according to the terms of a written loan contract between the lender and borrower. A standard contract specifying the terms and conditions of the loan is to be used for all incoming and outgoing loans.

Loans are made for a negotiable period of time, as determined by their purpose. The length of the loan must be clearly stated in writing when the loan agreement goes into effect. All loans are reviewed annually and may be renewed.

A condition report and photographs for the record must be on file before the release of the item(s) from the Witte Museum.

### **4. Loan Costs**

Packing and transportation costs will be paid by the borrower. A processing fee may be charged to cover the cost of staff time and the preparation of paperwork. Alternative arrangements may be negotiated at the discretion of the President and CEO at the recommendation of the Collections staff.

### **5. Insurance**

Insurance for outgoing loans must be in force before the material is sent. A confirmation letter or certificate of insurance must be received indicating that the loan items are insured wall-to-wall against all risks and naming the Witte Museum as a loss payee. When necessary, the borrowing institution will take out a special insurance policy or they will be billed for coverage granted under the Witte's policy. With the approval of the President and CEO, the Registrar may waive the borrower's insurance requirements and the Witte will provide insurance coverage. The Registrar must specify the insured value of each item on the loan form. If the borrower is unwilling to provide the specified insurance coverage, the loan will not be made.

When required, the Witte will insure incoming loans for all risk coverage at the value agreed to by both parties.

### **6. Staff Responsibilities**

The Registrar or Collections Manager must be notified of any plans to remove items temporarily from the collection for any reason. No item should be removed from an exhibition without a written record being made by the Registrar, Curator, or a designated assistant. The Registrar will be responsible for creating and maintaining all loan correspondence and documentation, and for the packing and shipping of loan items. The Registrar with the Curator(s) will ensure that insurance coverage is adequate for outgoing loans of collection items. Collections staff will review all loan records on an annual basis, and an annual report will be

compiled by the Registrar's office for distribution to the Board at the end of the fiscal year.

## **7. Temporary Custody**

Items may be left at the Witte Museum on a temporary basis for consideration as a donation, for identification, or for research. Conditions of deposit are detailed on the Temporary Custody Receipt which should be filled out for each transaction with (1) copy to the depositor, (1) copy to the Registrar's files, and (1) copy retained with the item(s).

If the offer of a gift has been declined or when the Witte has notified the depositor that its examination of the item(s) has been completed, the depositor may reclaim their property. If the property is not reclaimed within (30) days, the Witte may request, in writing, the withdrawal of the deposited item(s) within (30) days of the date of the request. If withdrawal has not been made at the end of this (30) day period, the Witte's responsibility for the safety of the item(s) shall cease. Any deposited object not withdrawn within one year after the date of the Witte Museum's first written request for withdrawal and concerning which the Witte has made at least one additional written request for withdrawal via registered mail, shall become the unrestricted property of the Witte Museum.

## **8. Disposition of Unclaimed Loans**

Disposal of unclaimed loan items shall follow the guidelines for items in temporary custody and Chapter 80 of the Property Code of the State of Texas.

### **I. DESTRUCTIVE ANALYSIS**

Destructive analysis is a procedure that destroys or alters all or a portion of an item. While the Museum recognizes that significant results that can be obtained by the use of destructive analysis, it seeks to balance the loss caused by sampling with the potential of the proposed research.

1. Requests for destructive analysis must be made in writing. Written requests must include the following information:
  - Name and contact information for researcher(s).
  - A description of the project including research methodology and expected outcomes.
  - A discussion of why non-invasive or non-destructive techniques cannot be used for this project.
  - Collection item(s) to be sampled, including sampling area, sample size and technique
  - Proposed date of sampling.
  - Location where the analysis will be performed and who will analyze the results.

- Qualifications of the researcher(s) to perform the sampling and analysis.
2. Requests for destructive analysis will be considered by the President and CEO, Chief Curator, Curatorial Staff and Collections Manager under the following conditions:
    - The purpose of the sampling is in keeping with the Museum's mission.
    - It is legal, ethical and advisable for the object to be subjected to destructive analysis and reasonable alternatives including non-invasive and non-destructive analysis have been considered.
    - The research methodology and expected analytical outcome are sound.
    - The researcher(s) are qualified to perform the work.
    - Each collection item can be safely sampled or cast in such a way that future research is not precluded.
    - The degree to which destructive analysis affects the collection item(s) is minimal.
    - There is a high probability of receiving analytical results from the research.
    - The Museum reserves the right to deny approval for destructive analysis without further justification.
  3. Approval is subject to the following terms and conditions:
    - Researcher(s) are responsible for all expenses associated with sampling and analysis unless otherwise indicated. The Museum may charge a fee to recover the costs associated with preparation of material for analysis.
    - Damage to collection items must be minimized. Where appropriate, researchers will be asked to undertake proper post-analysis treatment to stabilize the item(s) or make them aesthetically 'whole'.
    - Researcher(s) are responsible for documenting the sample size, location and technique of each sample taken for Museum records.
    - Unless otherwise stated the researcher must return to the Museum any unused portion removed material or products remaining after investigation for archiving and future research. All DNA samples must also be returned separately.
    - The Witte Museum shall be acknowledged in any publication or report that results from samples obtained from Witte Museum Collections.
    - The researcher(s) agree to provide the Museum with a complete copy of the analytical outcomes (including raw data in the form of graphs, computer printout, etc.) resulting from the sampling or testing of Museum Collections. Analytical outcomes should include not only raw results but also details regarding specific methodologies and instrumentation employed.
    - Copies of any publication, print or digital, that includes information resulting from the analysis of the collection items shall be provided to the Museum.
    - The Museum reserves the right to publish analytical results, or release the results to other scholars if the researcher does not provide them to the scholarly community in a timely manner (Generally three years from the date of testing unless otherwise stated and approved by the Museum).
    - The Witte Museum is the owner of and repository for all specimen material derived from the sampling project. All samples – including remains or residues

from extraction – shall be returned to the Museum at the completion of the project.

- No transfer of samples, in part or in total, to a third party shall be done without written permission from the Museum.
- No alteration, sampling, modification or testing of objects is permitted without prior written authorization in the form of a signed Destructive Analysis Agreement. Under no circumstances is testing permitted in the absence of a written agreement, including on the basis of verbal discussions with any staff member, curator or administrator.
- The Museum encourages researchers to contribute any genetic sequence data or radio carbon data to public databases such as GenBank (<http://www.ncbi.nlm.nih.gov/GenBank/index.html>). When contributing data to public data bases the Witte Museum shall be credited and researchers must ensure that sequences are accompanied by the appropriate Museum catalog and accession numbers.

## **VII. REFERENCE LIBRARY COLLECTION**

### **A. Acquisitions**

Acquisitions to the Reference Library are made through gift, promised gift, bequest, and purchase. The selection of material for the collection is made by the Reference Librarian in collaboration with the President and CEO, and curators.

A Deed of Gift will be issued for all gifts to the Reference Library Collection. If a deed of gift has not been signed and returned to the museum within 60 days, the transfer of title to the museum will be deemed complete if the following provisions have been fulfilled:

- The museum has physical custody of the item
- An acknowledgement letter has been sent to the donor.

Once title to an item has been transferred to the Museum, the Reference Librarian begins the process of cataloging the item.

#### **1. Considerations for Acquisition**

The following should be considered when acquiring material for the collection:

- Is the item consistent with the mission and goals of the Witte Museum?
- Is the subject matter related to one of the collection categories outlined in the Collection Plan, museology, or preservation?
- Is the item encumbered with restrictions imposed by the donor?
- If the item is being offered for sale, might it or a comparable item be obtained as a gift or bequest?

## **2. Authority to Acquire**

The selection of material for the collection is made by the Reference Librarian in collaboration with the President and CEO and curators.

### **B. Access**

Access to the Reference Library Collection is provided in the Express-News Reading Room in the B. Naylor Morton Research and Collection Center.

### **C. De-Selection**

#### **1. Criteria for De-Selection or Withdrawal**

The following criteria should be considered when withdrawing material from the collection:

- Is the item inaccurate, outdated, or obsolete?
- Is the item in poor condition?
- Is the item a duplicate that is no longer needed?
- Is there a lack of shelf space?
- Is there a lack of demand or use?

#### **2. Authority to De-Select**

The Reference Librarian in consultation with the curators may select items for withdrawal subject to the approval of the President and CEO.

## **VIII. RESEARCH COLLECTION**

### **A. Acquisitions**

Acquisitions to the Research Collection are made through gift, promised gift, bequest, purchase, exchange, and field find.

A Deed of Gift will be issued for all gifts to the Research Collection. If a deed of gift has not been signed and returned to the museum within 60 days, the transfer of title to the museum will be deemed complete if the following provisions have been fulfilled:

- The museum has physical custody of the item
- An acknowledgement letter has been sent to the donor.

Once title to an item has been transferred to the Museum, the Registrar will assign a Research Collection number and create a catalog record.

### **i. Considerations for Acquisition**

If the Witte Museum is offered or becomes interested in acquiring certain items for its research collection, the following should be considered:

- Does the item enhance the museum's knowledge and understanding of the accessioned collection?
- Can proper care be given to the item or will it require additional expense for conservation and maintenance?
- Is the item encumbered with restrictions imposed by the donor?
- If the item is being offered for sale, might it or a comparable item be obtained as a gift or bequest?
- Can valid title to the item be conveyed to the museum?
- Is acquisition of the item consistent with all applicable state, national, or international laws (e.g. NAGPRA, CITES) or conventions protecting the rights of artists, cultural patrimony, or endangered species?

### **2. Authority to Acquire**

The President and CEO may delegate authority to the curatorial staff to acquire objects for the Research Collection.

## **B. LOANS**

Loans to and from the Research Collection are subject to the same criteria as the Accessioned Collection as outlined in Section VI, Part H.

## **IX. LIVING COLLECTION**

### **A. Acquisitions**

Acquisitions to the Living Collection are made through gift, purchase, exchange, and field find. All living specimens accepted into the Living Collection become the Museum's exclusive property.

#### **1. Considerations for Acquisition**

- Ownership of the specimen will not conflict with any applicable local, state or federal laws.
- There should be a clear relationship between the specimen and the overall mission of the Museum.
- The specimen will not be an unnecessary duplicate of specimens already in the collection.
- The specimen will be of such size and condition that the Museum can provide it with proper care without undue expense or drain of the Museum's resources.

## **2. Authority to Acquire**

The President and CEO may delegate authority to the appropriate curatorial staff to acquire living collections within the limits set by the Collection Plan. These acquisitions are exempt from Collections Committee approval.

### **B. Care**

The Nature and Science Educator along with appropriately trained program presenters are responsible for the care and maintenance of the living collection.

### **C. Access to the Living Collection**

The Witte Museum provides access to its living collection through exhibition and educational programs. Access to the collection is at the discretion of the President and CEO, Curator, or designated staff member.

#### *Physical Access*

Physical access to the live specimens is restricted to only those who are responsible for the care of the collection and those who utilize the collection in educational programming.

#### *Public Access*

The use of live specimens in educational programs is done in accordance with the World Association of Zoos and Aquariums (WAZA) Guidelines for the Use of Animals in Visitor Interactions. These guidelines include, but are not limited to, safety, staff expertise, monitoring, assessment, and visitor interactions.

### **D. Disposition**

#### *Exchange*

If a specimen is of scientific value, the preferred method of disposal may be by exchange with another institution whose collections might benefit from the addition of the specimen.

#### *Donation or Transfer*

Where exchange of specimens is not feasible, the Museum may donate the specimen items to other non-profit educational or scientific institutions. Such transfers are limited to institutions recognized by the state or federal government and are exclusively for the purposes of research, education, or exhibition. The Witte shall consider the best interests of the specimen in making its decision.

### *Death*

All animals will be disposed of in accordance with the laws of the City of San Antonio which requires commercial businesses to contract with a licensed veterinarian for dead animal disposal. The veterinarian will determine if a necropsy to determine the cause of death is necessary. If appropriate, the animal may be preserved through taxidermy or as a skeletal specimen and submitted to the Witte Museum's Collection Committee for accession consideration.

## **E. Permits**

The Witte Museum is compliant with all state and federal laws regarding the possession, display, and care of live animals. The following permits shall be maintained:

- Educational Display Permit, Texas Parks and Wildlife Department

## **X. EDUCATION COLLECTION**

### **A. Acquisitions**

Items are acquired by gift, transfer, and purchase by the Curatorial and Public Programs Departments for education and research purposes. Records of their receipt and disposition shall be maintained by the Public Programs Department.

### **B. Types of Material**

The Education Collection may include, but is not limited to, props, models, and reproductions used for education and exhibition purposes.

### **C. Care and Disposal**

Items in this collection are not subject to the restrictions and standard of care afforded the accessioned collection.

## **XI. ETHICS**

No member of the staff or Board shall personally receive, directly or indirectly, any favor, promise, or thing of value which could or appear to induce, discourage, or influence a recommendation, decision, or action affecting museum accessions, deaccessions, exhibitions, or activities.

No member of the staff or Board shall compete with the museum for the acquisition of items and shall refrain from personal collecting in any manner that conflicts with the interests or credibility of the institution and its policies. No staff or Board member shall use their connection to the museum to further their personal collecting

goals. No member of the staff may provide written or verbal appraisals of monetary value for donors, lenders, board members, or the general public. When asked for a monetary appraisal, the museum will refer individuals to public resources for locating an appraiser. The museum will not recommend specific appraisers.

In no event should the potential monetary value of a collection item be considered as part of the criteria for determining whether or not to deaccession it. The decision to deaccession should be separate from discussions of disposition as well as the use of proceeds in the event of a sale.

In addition to the provisions listed above, members of the staff and Board must adhere to the Witte Museum Employee Handbook, Witte Museum Statement of Ethics for Trustees, and established codes of professional ethics such as those published by the American Association of Museums and its standing professional committees and the International Council of Museums.

## **XII. DEFINITIONS**

### **Accession**

Accessioning is the act of formally recording and processing an item into the accessioned collection.

### **Accessioned collection**

The accessioned collection is the collection of items that has been formally accessioned.

### **Acquisition**

An acquisition occurs by obtaining legal title to an item.

### **Collection item**

A collection item is an item that has been or is in the process of being accessioned into the accessioned collection. Throughout this policy, the term “item” will be used to indicate either an object or a specimen.

### **Collection Management**

Collection management encompasses the preservation, accessibility, and utility of museum collections and associated data by collection managers, registrars, curators, and administrators.

### **Collection Manager**

One who oversees the stewardship of the collection by insuring the proper care, preservation, and security of all collection items in adherence to museum best practices.

**Conservation**

Conservation is the use or application of techniques for maximizing the endurance of or minimizing the deterioration of an item through time, with as little change to the item as possible.

**Deaccession**

Deaccessioning is the formal process used to remove an item from the collection permanently.

**Deterioration**

Deterioration is the change or degradation of an item or material's physical or chemical state.

**Direct Care**

Direct care is an investment that enhances the life, usefulness, or quality of a museum's collection and is an expense that is not normally considered part of the museum's operating budget.

**Field Collection**

An item collected in a field research project or archeological excavation. Field Collections should be accompanied by complete field notes of their collection.

**Loan**

Loans are temporary assignments of items from the Museum (outgoing loans) or temporary assignments of items to the Museum (incoming loans) for stated purposes such as exhibition, research, or examination for possible donation or purchase.

**Preservation**

Actions taken to retard or prevent deterioration or damage to collection items by carrying out repairs or treating damaged materials, creating a safe display or storage environment, or any other action taken to prevent or delay deterioration and to maintain them as nearly as possible in an unchanging state.

**Registrar**

One who organizes and maintains orderly forms, legal documents, files, and retrieval systems associated with the acquisitions, accessioning, cataloging, loans, packing, shipping, inventory, and insurance of the accessioned collection.

**Stabilization**

Treatment of a collection item or its environment in a manner intended to reduce the probability or rate of deterioration and probability of damage.