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collections policy

division of collections and research

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The Milwaukee Public Museum (MPM) is among half-a-dozen major American museums that were established in the late 19th century. Although it was officially chartered in 1882, its existence and collections can be traced back to 1851, to the founding of the German-English Academy in Milwaukee and subsequent establishment of the Wisconsin Natural History Society. The Milwaukee Public Museum opened to the public in 1884 as The Public Museum of the City of Milwaukee. In 1976, ownership of the Museum was officially transferred to Milwaukee County. And in 1992, Milwaukee Public Museum, Inc. was established as a separate 501c3 organization. Milwaukee County retains ownership of the collections and the building. Milwaukee Public Museum Inc. operates the Museum in public-private partnership with Milwaukee County. The Museum is managed under a Lease and Management Agreement between the two entities.

Mission

The mission of the Milwaukee Public Museum is to inspire curiosity, excite minds and increase desire to preserve and protect our world's natural and cultural diversity through exhibitions, educational programs, collections and research.

Purpose of this Policy

This policy is to be used as an active guide for the museum's stewardship of its collections. It covers collection's policy institution-wide, and may not be altered or amended without proper approvals. While collections and research departments are responsible for managing individual collections, all departmental procedures must adhere to this policy document, in all forms. Departments may not create or implement individualized policy, and may not implement procedures that are in conflict with this document.

I. ACQUISITION AND ACCESSION

Acquisitioning is the process by which the Museum obtains an object and accessioning is the formal process of transferring the object to the Museum's permanent collections. The Museum may acquire objects for its research and educational purposes and not accession them into the permanent collection. This policy covers all acquisitions made by the Museum with specific reference to accessions.

A. Prerequisites for Acquisition

The Museum acquires objects selectively. In the absence of unusual circumstances, as discussed below, no object shall be accepted or otherwise acquired by the Museum unless it meets all of the following criteria:

1. It is of such nature and quality as to be consistent with and in furtherance of the accomplishment of the Museum's defined mission.
2. Its provenance is satisfactory.
3. It was obtained legally.
4. Clear title can be established.
5. It is unencumbered by donor restrictions.
6. Its use is unrestricted or unencumbered by intellectual property right or by its nature (e.g., hazardous materials).

7. Its collection from nature does not unnecessarily harm biological populations or deplete natural resources.

The Museum's policy must remain flexible enough for such circumstances to be dealt with on a case-by-case basis. It is recognized that circumstances can exist where the Museum should, at least temporarily, acquire an object that does not meet all of the above criteria. An example is where such an article is a part of a desirable larger collection which can only be acquired as a whole. If the Museum intends to use the object for purposes other than a "related purpose" as defined by the Internal Revenue Service, it will inform the donor. Another example would be an article of significant scientific importance which, although not germane to the Museum's collections, must be acquired in order to prevent the loss of its availability to the public through private sale, deterioration or destruction.

B. Requirements for Accession

Objects that are accessioned become a part of the permanent collection. In the absence of unusual circumstances, no object shall be added to the Museum's permanent collections unless it meets not only the general requirements for acquisition, but also all of the following criteria:

1. To the extent foreseeable at the time of its accession, it can be expected that it will remain permanently in the Museum's collection.
2. Its accession will result in an improvement either of a specific existing collection or of the Museum's collections viewed as a whole.
3. It will be possible for it to be adequately stored, conserved and cared for.
4. Its desirability as an addition to the Museum's collections is sufficient to warrant both the storage space and care.

The registrar audits, tracks and maintains accession documentation. An accession is complete when objects have been received by the Museum, ownership has been transferred to the Museum, and recorded in the registrar's office.

C. Modes of Acquisition

The MPM may acquire objects through one of the following channels:

1. Donation (Gift or Bequest) -- donations shall only be accepted if the donor has clear title of ownership. The transfer of ownership occurs when the objects are under the sole and immediate control of the Museum.
2. Purchase --an object may be purchased when it meets the collecting goals of the appropriate department and cannot be obtained by other means. The object must be purchased in a legal and ethical manner.
3. Field Collection -- field collections are acquired by collection staff that either conduct field work or accept such collections from staff and non-staff researchers. When field collections are made on private property, they must have the full permission of all landowners and if fossils, must be donated to the Museum by the landowner. All field collections must have all required permits.

4. Exchange/Transfer – the Museum may exchange/transfer objects with other educational or non-profit institutions in compliance with established Museum acquisition and deaccession policies and procedures.
5. Salvage – the Museum may rescue or be called upon to take custody of objects to prevent their loss or destruction. This typically refers to collections from public land/space or confiscated objects and is at the behest of a public agency and often requires immediate attention.
6. Abandonment -- unclaimed objects left at the Museum.
7. Government deposit – the Museum may accept confiscated objects or objects from public land and/or serve as a repository for objects subject to current government regulations.

D. Authority to Acquire

In normal circumstances and subject to the following conditions, the person in charge of the applicable collection will recommend acquisitions for approval to the section head.

Advance consent of the head of collections and the President/CEO is required for exceptional acquisitions and those valued over \$10,000. This applies wherever there is reason to believe that an acquired object(s) could significantly affect the general interests of the Museum, as where the object has substantial monetary or publicity value, cultural sensitivity, or where it would require substantial or special storage space, or where its care or conservation would require unusual time or expense. It shall further be the obligation of the President/CEO to determine whether it is desirable or practical to obtain the advance consent of the Board of Directors. In making such determinations, the head of collections and the President/CEO should resolve any doubts in favor of obtaining a higher-level consent.

E. Legal Requirements for Acquisition

No object shall be acquired until the Museum has obtained satisfactory assurance that the donor or seller can transfer clear title. In all instances, the gift or sale of an object to the Museum should be accompanied by a written instrument conveying transfer of ownership, such as a Deed of Gift, Last Will and Testament, or bill of sale, signed by the donor or seller which provides a description of the object(s) being given or sold.

Due diligence should be used to ensure that any object acquired by the Museum was legally imported into or obtained within the United States and that there are no legal, ethical or environmental considerations which would make its accession undesirable or controversial.

F. Restrictions or Conditions Imposed by Donor

It is the general policy of the Museum that no object may be accepted unless its ownership by the Museum is free of all restrictions and conditions.

It is recognized that exceptional circumstances can arise where strict enforcement of this general policy would not be in the best interests of the Museum. Any such exception must, however, have the advance approval of the person in charge of the collection, the section head, the head of collections, the President/CEO and, if the President/CEO deems it desirable, the Board of Directors.

In any event, every attempt should be made to hold restrictions or conditions to a practical minimum and to obtain the consent of the donor that the restrictions will terminate after a finite time limit.

If any restrictions or conditions are accepted, they must be in writing and executed by both the donor and the Museum and must be included in the accession file.

G. Public Notification and Transparency

New acquisitions will be made public on a yearly basis.

H. Appraisals

No appraisals of any object (whether or not donated to the Museum) shall be made at any time by any Museum personnel, including any member of the Board of Directors. However, advice may be given by staff regarding the methods of appraisal.

Formal appraisals required by the donor, if any, shall in all instances be obtained by the donor at the donor's expense from a third party.

I. Acceptance of Gifts to be Sold by the Museum

Occasionally a donor may offer to give an object of value to the Museum with the intent that it will be sold by the Museum and the proceeds will be used for Museum purposes.

Such gifts may be accepted, subject to the prior approval of the head of collections, the President/CEO and, if deemed desirable, the Board of Directors.

In such event, the object shall be acquired but not accessioned by the Museum and shall be temporarily held until the object can be sold in such manner as determined to be in the best interest of the Museum. Such acquisition must meet the same guidelines as other acquisitions.

J. Acceptance of Specimens to be Shared

From time to time, the Museum may collect objects jointly with another museum or institution with which it agrees to share the resulting object(s).

No such object(s) shall be accessioned until a written agreement has been reached as to which object(s) are to stay with the Museum and which is to become the property of the other institution.

When such agreement has been reached, objects shall be divided between institutions and the remaining objects shall be accessioned, if appropriate.

K. Teaching Collections

The Museum also collects materials for teaching purposes. The primary teaching collection is maintained by the Museum's Education Department, although many of the curatorial departments also

maintain teaching collections. Although these collections may contain accessioned materials, they are generally composed of non-accessioned materials and it is not general policy to add accessioned materials to these collections. It is the Museum's policy not to use accessioned objects for hands-on educational activities (see Teaching Collections Policy).

L. Objects for Exhibition

Periodically, the Museum may acquire objects for display. If these objects meet the requirements of accessioning, they may be accessioned by the appropriate department and become the responsibility of that department and are under the authority of that department. If they are not accessioned, they will be deemed props and will be managed by the Exhibits Department.

M. Living Collections

The Museum retains living collections for research and educational purposes including exhibition. These are governed by the Museum's animal care policies as well as international, federal and state regulations. The Museum abides by all legal and ethical standards (see Living Collections Policy).

II. DEACCESSION AND DISPOSITION

Deaccessioning is the process by which an object is removed from the Museum's permanent collections by legal means. Disposition is the transfer or removal of deaccessioned or non-accessioned objects physically from the Museum.

The Museum holds its collections in trust for present and future generations of the public. Because of this, deaccessioning must be done with great care and consideration and with the best long-term interests of the collections and the public in mind. That said, there are a number of reasons healthy museums regularly deaccession objects, including evolving scholarship, changing standards in museology, refinements of museum mission and collections focus, consideration of the wider public good, and other specific criteria as noted below. Deaccessioning is a highly visible act that is rightly subject to close public scrutiny. Therefore, the Museum must be 1) cautious and deliberate in considering deaccessions, 2) hew to the current ethical and procedural standards of the museum field and 3) be scrupulous in the disposition of deaccessioned objects.

A. Conditions Warranting Deaccession and/or Disposition

An object included in the Museum's collections may be considered for deaccession or disposal only if it meets at least one of the following criteria:

1. Its retention would be inconsistent with the character of the Museum's collections as a whole and with its current mission, policies and objectives with respect to those collections.
2. The title of ownership is in the hands of others and not the Museum.
3. In the opinion of staff, it either lacks authenticity or is so lacking in documentation as to render it valueless for purposes of scholarly study or public education.
4. It is a duplicate or of inferior quality to another identical or similar article in the Museum's collections.

5. It is in such poor condition or in such a state of deterioration that it no longer provides value as a part of the Museum's collections.
6. The possibility exists for it to be exchanged for some other object that has substantially more scientific, historic or educational value that is more consistent with the Museum's mission and collections.
7. It may be repatriated when and where appropriate in keeping with the Native American Graves Protection and Repatriation Act and any other relevant governmental laws or acts and moral obligations.
8. It cannot be adequately stored or cared for.

B. Who Can Authorize Deaccession and Disposition

1. Accessioned objects – General

In general, the person in charge of the collection initiates the deaccession of objects. The object intended for deaccession shall be given an estimated dollar value by the person in charge of the collection. The head of collections and/or President/CEO must concur in this valuation. Where the deaccession involves a number of related articles, they shall be valued as a group.

If the market value of the object is \$100 or less, the section head or head of collections has the authority to deaccession and dispose of the object. If the market value is less than \$2,000, deaccession may be authorized by the head of collections. If the market value exceeds \$2,000, the deaccession must also have the approval of the Museum's President/CEO and Board of Directors. If the market value of the deaccession exceeds \$5,000, the Museum must additionally have the approval of the Milwaukee County Board of Supervisors.

2. Accessioned objects - Special Cases

- a. Native American Collections: If the proposed deaccession is of Native American origin, deaccession must also have the approval of the Museum's Board of Directors and the Milwaukee County Board of Supervisors regardless of value. However, if the proposed object has been determined to be repatriable under the Native American Graves Protection and Repatriation Act, the Museum is obligated by law to deaccession and return it to the tribe (see the Museum's Repatriation Policy and Procedures). The Museum will not bring this to the Board of Directors or the Milwaukee County Board for approval, but will notify both, in writing, at their next scheduled meeting.
- b. Human Remains: Deaccessioning of all human remains not covered by international, federal, state and local laws and regulations must be approved by the Museum's President/CEO, Board of Directors and the Milwaukee County Board of Supervisors.
- c. Natural Science Collections: Persons in charge of natural science collections may be authorized by the head of collections to deaccession small quantities of specimens to be retained by scholars at other institutions as part of the routine arrangement for many research loans.

3. Non-Accessioned objects. In the case of non-accessioned objects of little or no value (less than \$100), the person in charge of the collection may be authorized by the head of collections to

dispose of the object(s). If the valuation is less than \$2,000, the head of collections shall have the authority to approve disposal and if greater than \$2,000, the President/CEO shall have the authority to approve of disposal.

C. Obligation to Donor

In general, the Museum balances the desire to retain the goodwill of donors with its obligations to carry out its functions in a reasonably efficient manner. Donors of deaccessioned articles (or their surviving families) should be courteously dealt with and kept informed of any such deaccession to the extent deemed necessary and appropriate in the judgment of the President/CEO.

If an object intended for deaccession has restrictions which do not allow for deaccession, and if the donor is still living, every attempt shall be made to obtain from the donor a written waiver of such restrictions and consent for deaccession. If the donor fails to provide such a waiver, the Museum must abide by the terms of the original accession agreement. If the donor is no longer living, it will be necessary to consult legal counsel as to whether there is other recourse to lifting restrictions.

D. Evaluation of Museum's Title

The Museum must perform due diligence to establish that it has clear title to the object and has full power and authority to transfer such title to others. This may require actions within the legal system. Special care should be taken to make certain that the object is not held by the Museum on loan (See Loan section of this policy (§ IV) and Wisconsin legislation for obtaining title).

E. Notification and Transparency of Deaccession

The President/CEO shall provide the Board of Directors with an annual report listing all deaccessions made by the Museum. The Museum Corporation shall deliver to the County within 120 days following the end of the year a list of all objects deaccessioned in the previous year.

A written memorandum of the facts relating to the disposal of the deaccessioned object(s), and anything received in exchange, or payment thereof, shall be prepared and retained as a permanent record of the Museum.

F. Disposition of Objects (Deaccessioned and Non-accessioned)

The Museum will observe the following priorities for disposition of objects, especially in cases where monetary value exceeds \$2,000. The head of collections and Registrar should ensure that the means of disposal comply with all applicable laws and regulations.

1. Fulfillment of Legal Obligations. This may involve repatriation under the Native American Graves Protection and Repatriation Act.
2. Transfer. Objects of minimal value, whenever practical, should be available to the Museum's Education Department for use as educational aids. Due to the nature of their use, they must be considered expendable and as such their use may result in their ultimate destruction.

3. Gifts. It is customary in some disciplines for scientists who borrow and identify biological or paleontological objects to retain some duplicate examples for the collections of their institution. Such gifts of objects usually involve negligible monetary value. All such transactions shall be in keeping with the norms of the scientific discipline involved. Deaccessioned or non-accessioned objects may also be donated to other non-profit institutions.
4. Exchanges. The formal reciprocal transfer of objects between two or more institutions, or between an institution and an individual, is desirable if it serves to advance the research, educational, or exhibition programs of both parties. An open exchange is an ongoing agreement between the Museum and another institution. By prior arrangement, the two institutions agree to exchange material over a long period of time without concern for simultaneous shipments. Generally, exchanges are not made unless the object has been studied, determined, and documented, or represent duplicate or out-of-scope material.
5. Sales. An object may be sold with the goal to bring the best possible price if such sale is in the best interest of the Museum and is consistent with the Museum's responsibilities for preservation of collections of scientific, cultural or historic value.

The preferred type of sale, whenever an appropriate price can be so obtained, is to another museum or similar non-profit institution where the article will continue to be held for the benefit of the public. If this is not possible, then the sale should, whenever practical, be by public auction. Only in rare instances, and where necessary in order to obtain an adequate price, should such a sale be made through a private dealer, and in such instances it should, after formal approval by the Board of Directors, be made on consignment for sale pursuant to a pre-negotiated commission.

Public auction, sealed bidding, and open bidding over a period of time are acceptable options, provided that the availability of such material for sale has been given publicity aimed at the appropriate audience of potential purchasers.

6. Destruction. Removal or culling from the collections is an acceptable practice in cases of undocumented, surplus, hazardous, or deteriorated objects, essentially of no scientific, historic or monetary value. If objects cannot be disposed of by the above mentioned methods, then they may be destroyed and discarded, in accordance with the Museum's Registration Procedures.

G. Use of Proceeds of Deaccession/Disposition

Proceeds from the sale of deaccessioned/disposed objects shall be used for the direct care and/or acquisition of collections and shall be accounted for in a restricted fund overseen by the head of collections and President/CEO. The restricted fund will accrue and maintain proceeds from deaccessions/dispositions indefinitely, and shall only be spent in accordance with the information

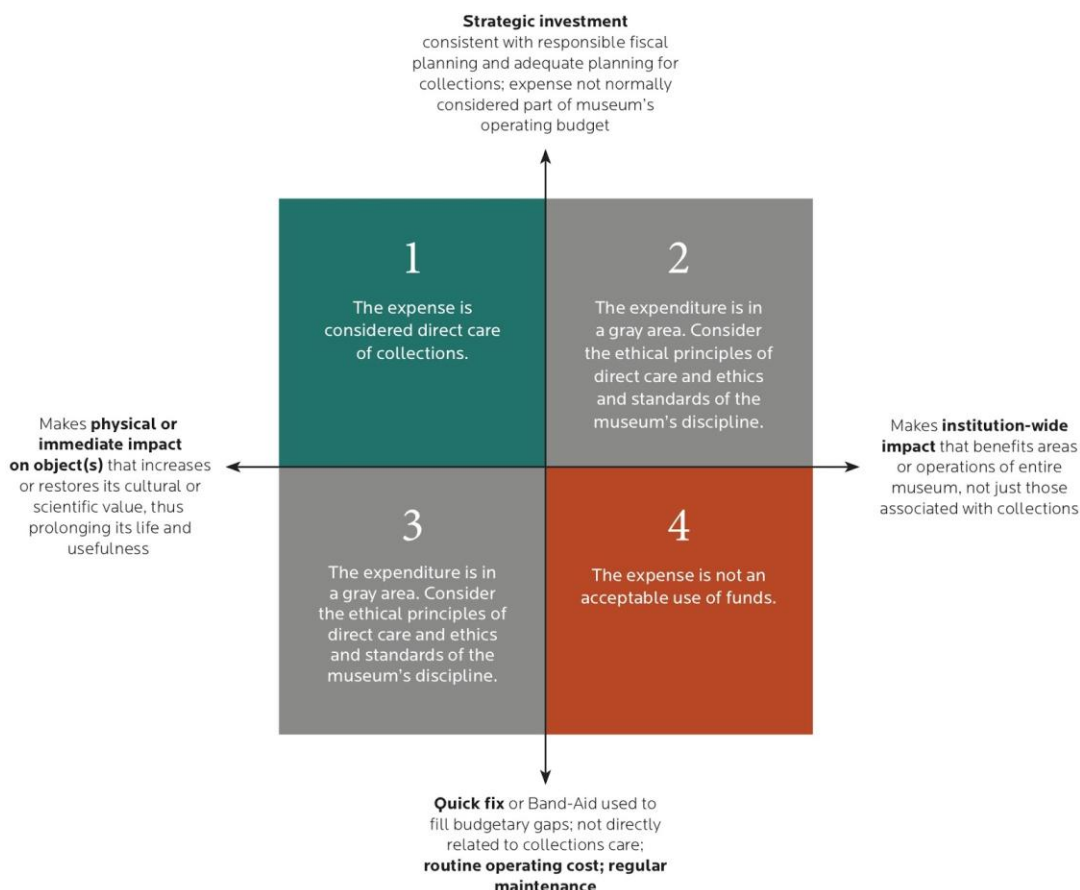
detailed in Deaccession sections H - K of this document. An indefinite time frame for spending promotes better long-term direct care considerations over short-term spending within an annual time frame.

It shall be the responsibility of the Museum and the Registrar to comply with all requirements of applicable international, federal and state law, including any requirements of the Internal Revenue Service.

H. Scope of Direct Care of Collections

The Museum's interpretation of direct care of collections will, at its most basic, invest financial resources in its existing collections by enhancing their life, quality or usefulness. Actions that positively impact physical collections care and demonstrate strategic investment in the collections will be prioritized. In order to fulfill this directive, the Museum will utilize the American Alliance of Museum's "Direct Care of Collections Matrix" to evaluate proposed actions and make determinations of their fitness with direct care criteria. This matrix (depicted below) will guide all decisions regarding the use of proceeds from deaccessioning that do not fall under the auspices of new collection acquisitions.

In general, use of funds qualify as direct care when they are 1) a strategic investment in the collection objects, meaning that the use has been carefully considered and planned for over a course of time that is appropriately proportionate to the impact, and 2) when the use has a physical or direct and immediate benefit to a specific object or defined group of objects and increases or restores their cultural or scientific value or lifespan. This latter consideration is contrasted with actions that have institution-wide impacts that simultaneously benefit collections.



I. Examples of Direct Care

The axes of the matrix represent two continua: scale/focus of the impact (horizontal) and speed of/motivation for the decision (vertical). Some actions will be clearly within the upper left quadrant (1) and unambiguously constitute direct care. Others will clearly be within the lower right quadrant (4) and are unacceptable uses. However, some proposed uses will fall near or within the intermediate quadrants (2 & 3); for these areas of ambiguity, the following examples can serve as reference points for appropriate vs. inappropriate uses of direct care funds:

Examples of direct care can include (but are not limited to):

1. Conservation/repair treatments to objects.
2. Integration of new, archival storage furniture to replace non-compliant or not best-practice storage.
3. Purchase of archival supplies toward rehousing of specific objects.
4. Enhancements to specific object digitization (e.g., high resolution photography for making virtual loans).

Examples of an inappropriate use of direct care can include (but are not limited to):

1. Funding employee salaries to carry out collection care.
2. Correcting structural or infrastructural building concerns (lighting, fire suppression, etc.).
3. Facility repair or maintenance.
4. Actions that have primary benefits beyond specific collection protection/care (such as upgrading exhibition walkway lighting, improvements to laboratory HVAC, etc.).

J. Determining Use of Proceeds For Direct Care

Any full-time, permanent staff member employed in the Collections and Research department may propose a use for funds generated from the Museum's deaccessions/disposition efforts. The requesting staff member should ensure that each submitted proposal adheres to the Direct Care Matrix as defined under Deaccession section H. Proposals will be collected by the Registrar and evaluated annually.

On a yearly basis, the permanent members of the Collections and Research department and the Head of Collections will convene a Direct Care Committee, where the collected proposals will be ranked according to their need and impact on the direct care of the museum's collections. As a whole, this Committee will assess each proposal against the Direct Care Matrix to determine, in their estimation, if each proposal meets the criteria for direct care. They will then generate a ranked list of the proposals. The Committee shall come to a consensus on the top proposals that do not exceed the available funds. These will be submitted in writing to the Head of Collections and be approved by the Museum's President/CEO.

The Registrar will be responsible for compiling and maintaining a cross-discipline list of proposals throughout the year, and will oversee the committee's actions during the annual meeting. Proposals

submitted in one year but not selected for request will remain on the list for subsequent years until the proposal is obsolete or removed by consensus of the Direct Care Committee.

K. Approval for Use of Funds for Direct Care

The Head of Collections will review and evaluate the case for the use of funds as submitted by the Direct Care Committee. They will then make a recommendation to the museum's President/CEO. Because the President/CEO does not directly propose uses for funds or participate in the prioritizing process, s/he acts as a check and balance while making the final approval for use of funds for direct care. The President/CEO approves or denies proposals based on the information submitted by the Direct Care Committee, and on the proposal's compliance with the Direct Care Matrix. If the President/CEO denies a request submitted by the Direct Care Committee, the proposal returns to the Committee with an outline of the reasons for denial. The Committee may choose to either revise the proposal by addressing the concerns raised and resubmit, or may submit a new proposal for review.

L. Acquisition of Deaccessioned Objects by Museum Personnel

No deaccessioned object may be acquired from the Museum by any member of the Museum staff or Board of Directors, or by any member of or representatives of their immediate families. For purposes of this section, the term "immediate families" shall mean the spouse, linear descendant, linear ascendant, or sibling of the Board member or staff member.

III. REPATRIATION

Repatriation is the return, to official governmental authorities, of material which was acquired under circumstances that render them invalid for the Museum to claim. This includes material which cannot be alienated, appropriated, or conveyed by any individual from a group such as items of historical, traditional, or cultural importance to a group or of sacred nature. The Museum recognizes that it holds objects, to which it may not hold rightful ownership and, based on an appropriate request and review, may repatriate that material.

The Museum fully supports and will be in full compliance with the Native American Graves Protection and Repatriation Act [25 U.S.C. §§ 3001-3013 (NAGPRA)] as well as applicable Wisconsin State law and other policies set forth by the American Alliance of Museums. The separate Museum Repatriation Policy covers all Native American and Native Hawaiian material as well as other requests for repatriation. Any repatriation must follow the Deaccession section of this policy (§II). Records of all repatriation requests and activities are permanently maintained by the Museum.

IV. LOAN POLICY

The Museum lends objects to other non-profit institutions and receives objects on loan from other institutions and individuals to enhance the research, exhibition and educational programs of the Museum. All loans, incoming and outgoing, are made in accordance with all international, federal, state and local laws and regulations. The Museum reserves the right to deny loans and to recall any loan if the welfare or

integrity of the object(s) appears to be compromised, or for any other reason deemed necessary by the Museum. The following loan policy encompasses both incoming and outgoing loans, and governs objects in all areas of the Museum, including all categories of collections - permanent, research, exhibition, education and teaching collections. This policy is also supplemented by departmental loan procedures. Museum staff are responsible for complying with both Museum policy and departmental procedures regarding loans.

A. Approval Authority

The person in charge of a collection is authorized to make and accept loans of relevant objects for the Museum, as is the head of collections and the Registrar or the appropriate member of the administration when required by lenders. The Registrar is responsible for all facility reports, for verification of all lending and borrowing restrictions and conditions, for maintaining a permanent file of all past and present loans and their documentation and for providing support for all loan activities as needed. No other staff are authorized to make or accept loans on behalf of the Museum unless so delegated.

Loans requested for exhibition purposes or for cultural collections must be approved by the collections staff or guest curator in charge of the exhibit project and are processed by the Registrar.

B. Conditions for Loans (Incoming and Outgoing):

- a. The Museum does not lend objects to individuals.
- b. The Museum will lend objects to institutions that are capable of caring for the objects.
- c. The Museum reserves the right to set conditions and restrictions related to packing, appraisal, shipping, insurance, exhibition installation, environmental controls, general handling and security. A facilities report may be requested. Likewise, when borrowing objects, the Museum will comply with loan provisions set forth in writing by the lending institution.
- d. Objects that are covered by the Convention on the International Trade of Endangered Species of Flora and Fauna (CITES), the UNESCO Convention on Cultural Property and the Native American Graves Protection and Repatriation Act or other international, federal, state and local regulations are loaned and borrowed only in accordance with those regulations and may require special permits.
- e. Borrowing institutions or their agents may not alter objects on loan without prior written consent from the person in charge of the collection.
- f. Borrowers may not transfer the object on loan to a third party without prior written consent from the person in charge of the collection.
- g. Borrowers may not photograph loan objects without the written consent of the person in charge of the collection or the Registrar. The Museum reserves the right to charge a reasonable fee for the photographic use of its collections. For objects that are borrowed by the Museum for exhibition, the Museum will abide by the stipulations placed on the object by the lending institution.
- h. The Museum or department may require additional restrictions or conditions to be met based on the condition of the object or the purpose of the loan. These conditions will be printed on or attached to the loan form.

C. Documentation

Permanent records for all incoming and outgoing loans are maintained by both individual departments and the Registrar, and generally include loan agreements, correspondence, and documentation.

D. Costs

Borrowers may be requested to pay for recoverable costs that may include appraisal, conservation, couriering, exhibit preparation, packing/crating, photography, research, shipping and loan processing. This is especially true of cultural loans for exhibition. Loans for research purposes usually incur only the costs of return shipment of the loan due to the mutually beneficial activities of such loans.

The Museum will provide proper U.S. Customs export documentation for all international loan shipments. However, the borrower will be responsible for all customs-related fees, such as licensing, processing, brokerage, etc.

For incoming loans and traveling exhibits, the Museum will abide by lender/exhibitor requirements and contracts.

E. Duration of Loan

Materials loaned for exhibit purposes are generally loaned for a period of three months to one year. No "permanent loans" are made and any "long-term" loans (one year or longer) require additional approval by the person in charge of the appropriate collection as well as the head of collections. The Museum President/CEO shall review all requests for long-term loans prior to their approval or rejection. Requests for further extensions of loans beyond 2 years require reapplication.

Research loans for type material are loaned for six months and for non-type material for one year. Extensions of loans must be made on a yearly basis. Upon completion of the research (natural science and cultural), a copy of the publication or research report is to be submitted to the lending department.

The Museum does not receive "permanent loans" or loans without a stated purpose, such as those which are offered to the Museum by private individuals without a written agreement for future donation.

F. Sampling and Destructive Analysis

The person in charge of the collection may give permission for sampling and destructive analysis to be conducted on whole or portions of an object for research purposes. This should be done according to the departmental process and procedures.

Objects sent to other institutions for the purposes of sampling or destructive analysis are treated as outgoing loans for the purpose of documentation, but the Museum recognizes that a portion of the loan may not be returned. However, the lender agrees to return to the Museum all unused portions of the object(s), plus any ancillary products and/or analytical results, unless otherwise agreed upon in writing.

G. Internal Loans

Loans are occasionally made between departments for special programs or projects, usually for the purposes of education. Records of such loans should be made on Interdepartmental Loan Forms which list the borrower, purpose, dates of loan, material and Museum numbers and authorization. Any special restriction, such as handling, should also be noted on the form. Copies of these forms should be filed with the Registrar. Records of loans for exhibit purposes will be kept in case files maintained by the Registrar.

H. Library and Teaching Collections Loans

The Museum also makes loans to and from the Library, Photograph, and Teaching (Educational Programming) Collections (see Teaching and Library Collections Policies).

I. Non-accessioned Collections Loans

Requests for loan of non-accessioned material will be reviewed by the person in charge of the collection on a case-by-case basis and are also subject to this policy. Certain requirements may be lifted. Loans imply that materials are to be returned to the Museum and, therefore, require appropriate loan authorization and documentation (authorized approval and loan forms).

J. Old Loans

The Museum endeavors to avoid old loans, which are defined as material which has been left in the Museum without correspondence with the lender or for which the lender cannot be found. The Museum seeks to prevent the occurrence of this situation and through Museum policy, to resolve old loans which exist.

Individuals leaving material at the Museum for identification or possible donation are required to complete and sign a Receival Form which specifies that material left for such purposes and unclaimed after 30 days will be considered Museum property.

The State of Wisconsin has enacted "1993 Wisconsin Act 18 (ch. 171.11)" to cover property in possession of a museum or archives which defines methods of establishing loaned property as abandoned and allows for the Museum to obtain title. The Museum will follow this legislation (See Wisconsin Act 18).

Lenders will be requested to keep the Museum informed of any change of address or ownership of material left at the Museum. Full records will be kept of all actions.

V. CARE OF COLLECTIONS

Long-term preservation of the Museum's collections is central to the mission of the Museum. It is a responsibility shared by the Board of Directors, the President/CEO, all staff and others who use the collections. Good collections care requires best methods in proper handling, storage, access and use to prevent damage and preserve the collections in the best possible manner for long-term use. It is dependent on well-trained professionals who regularly improve their knowledge of collections care.

A. Responsibilities

Responsibility for the collections lies with the following entities and positions in the Museum.

1. Milwaukee County. Milwaukee County holds title to the Museum collections and provides the facility in which those collections are stored. It is the fiduciary obligation of the County to ensure the facility, including the physical and environmental conditions of the facility, meets the standards for collections care set by the accrediting authority for Museums, the American Alliance of Museums.
2. Board of Directors. The Board of Directors holds the collections of the Museum in trust for the citizens of Milwaukee County through a "Lease & Management Agreement" between Milwaukee Public Museum, Inc. and Milwaukee County. As owner of the collections, Milwaukee County also shares this responsibility.
3. Senior Management Staff. The Senior Staff, led by the President/CEO, is charged with overseeing the operations of the Museum and the care of the Museum collections. Through the budgeting process, they work to provide the necessary funds and staffing for the proper, long-term preservation of the collections.
4. Paid Staff. All Museum staff, not only curatorial, aid in holding the collections in trust for the public. They share a responsibility to past, current, and future constituents, to creators of the objects, donors and users of the collections, to preserve the collections and their documentation in optimal condition. It is a responsibility of all staff to share information, provide support, and work cooperatively with one another to provide proper care and security for the collections.
5. Collections Staff. While all staff share in responsibility for the welfare of the collections, decisions concerning everyday care and use of collections ultimately resides with the person in charge of each collection, in consultation with the head of collections, Registrar or a conservator.
6. Unpaid Staff (Volunteers/Interns). Unpaid personnel such as volunteers and interns also have responsibilities for the care of the collections and should be informed of this. They must follow Museum and departmental collections care procedures, as well as general volunteer and internship guidelines as directed by supervisory staff and must not abuse the status they have been granted to work with the collections.
7. Non-Staff Users (Researchers, Students, Visitors). Persons using the collections are required to follow all Museum and departmental guidelines and the Collections Access section of this policy (§ VIII).

B. Collections Protection

1. Areas of Responsibility. While it is an all-Museum responsibility, the Museum Public Safety and Security Department is specifically charged with the security of the Museum's collections and the safety of staff and visitors. Security of the collections is of prime importance, superseded only by

life safety of the staff and visitors. To facilitate this, all staff are required to report any situations in which individuals or collections are or may be in jeopardy.

2. Museum Security. Museum Public Safety and Security provides visitor assistance and monitors all Museum areas, 24 hours a day. It maintains keys, and an operating electronic security and fire detection system and works for continual improvement in this area. Security officers have unrestricted but monitored access to all areas of the building; however, they may not handle Museum objects except under the supervision of appropriate Museum staff. The exception is an emergency where time is a critical factor and collections personnel are not available. For this reason, it is vital that they receive training in the proper handling of objects.

The Security staff, in conjunction with the Registrar, is responsible for the initiation and tracking of records for collection objects that are hand-carried into and out of the building. Records are also kept of all regular access to the Museum collections areas, after-hours building access and access by all visitors to restricted (non-public) Museum areas.

Security provides access and staff as needed to monitor non-staff personnel in collections areas and non-public areas. The person in charge of the collection must be contacted prior to anyone (non-security staff or non-staff) going into a collection area. Security may provide keys to open exhibit cases. If keys are checked out by a staff member, they are not to be transferred to a third party.

3. High Security Areas. The Museum maintains several high security locations, such as vaults, which require additional levels of access clearance. The Museum Registrar is responsible for the basement vault and shares responsibility with the Museum Controller for the General Office vault. Security is responsible for providing an officer when the basement vault is open. A Vault Policy, which includes access and record keeping requirements, covers these special areas. Individual departments may establish and monitor other high security areas within their collections space.

C. Collections in Storage

1. Environment and Housing. The Museum's goal is to provide optimal environmental conditions for collections. Such an environment is stable and is attuned to the needs of the object. This includes the installation, operation and maintenance of both Museum-wide and localized environmental control systems. Monitoring and maintenance is a joint project between Facilities and Collections (Curatorial, Education, Library, Photography, and Registration) departments. Good housekeeping and a regular maintenance schedule for all collections areas is provided by Custodial, Collections, and Exhibit departments. The Conservation department or those responsible for its activities monitor the physical and chemical Museum environment, including temperature, humidity, light, air pollution and pest activity. The Museum strives to provide optimal housing for all collections, using methods and materials which meet recognized conservation standards.

2. Handling. Proper handling of Museum collections is vital in preservation efforts. Collections departments establish handling guidelines in consultation with a conservator, if necessary, and provide instruction to all individuals dealing with their collections. Such guidelines establish who, how and under what circumstances personnel may handle collections. In particular, visiting researchers, when allowed to handle these materials, must be informed of Museum procedures.

D. Collections on Exhibit

Collections on exhibit are subject to the same concerns, considerations and policies as collections in storage. However, they are generally subject to more environmental stresses and are more vulnerable on exhibit. The stability and preservation of collections objects displayed is a primary consideration in exhibit design and production. The Collections and Exhibits departments work together to meet optimum conservation standards for permanent, short-term, incoming and travelling exhibits. They consult with conservators to establish standards for the exhibition of objects (see the Standards for the Exhibition of Collection Objects policy) which include consideration of the condition of the object, light and other environmental levels, and specifications for handling, mounting, case design and construction. Final decisions regarding use of collections on exhibit rests with the person in charge of the object(s).

E. Collections in Other Locations

Care of collections while they are out of their normal locations is also a concern. Museum Collections Policies on loans, access and teaching collections also deal with these issues. Collection objects housed in other departments are subject to the same care guidelines as developed by the department formally responsible for the object(s). Such guidelines must be strictly adhered to and generally cover proper handling, use and security procedures.

In general, accessioned objects will not be used in hands-on educational programming.

F. Conservation of Collections

The Museum is committed to both preventive and interventive conservation. The Museum maintains a properly equipped Conservation Laboratory for use by professional conservators who operate in accordance with the American Institute for Conservation of Historic & Artistic Works *Code of Ethics and Standards of Practice*. Collections staff are responsible for the physical care, preservation and determination of conservation treatment of accessioned specimens in their respective collections. When professional conservators are not on staff, the Registrar is responsible for arranging for professional conservation services. Arrangements for conservation treatment, when deemed necessary, must be approved by the person in charge of the collection. Treatment may be delegated to other properly trained staff, performed by others in a supervised situation, or contracted out.

G. Disaster Preparedness and Response

Preventive measures and effective responses to emergency situations where the Museum and the collections are imperiled are outlined in a disaster preparedness and response plan that analyzes potential problems, plans responses and, through training and drills, enables staff to respond efficiently when

disaster occurs. The Museum develops and updates the disaster preparedness and response plan and procedures on a regular basis.

VI. INVENTORY

The Museum recognizes the importance of conducting and maintaining accurate inventories of the collections as part of its responsibility to the citizens of Milwaukee County who own the collections, to the museum profession, and to the scholarly community.

The purpose of periodic inventories is to confirm the presence and location of objects in the collections. Missing or misplaced objects and objects which have lost catalog numbers or data are identified during this process. This information is vital in reporting the status of Museum collections as well as for insurance and security purposes.

The specific location of objects in the Museum, especially those not on exhibit, is generally restricted information due to the necessity of maintaining high security for collections and the sensitive nature of some objects.

A. Method

The method of conducting inventories varies with the nature and volume of the objects in the collections. Each department identifies objects which should be inventoried, and the method to be used, in consultation with the Registrar, who bears overall responsibility for collections inventories. The "material value" of collections objects may be used to establish whether a standard item-by-item or summary method of inventory is to be used. "Material value" means that an object or collection may have high or low value based not only on monetary (fair market) value, but also on rarity, scientific or historic merits.

B. Inventory Schedule and Maintenance

Inventory is on-going in each of the departments. Each department establishes a method of inventory control which includes records of movement and object additions and removals. Some objects, such as those on exhibit or of high (monetary, scientific or collectible) value are inventoried annually. Each department produces a list of those objects to be inventoried each year. In addition, spot inventories of selected collections are done periodically under the direction of the Registrar.

C. Records

Records of collections inventories are maintained by the department responsible for a particular collection. A copy is kept by the Registrar. Catalog records are amended as a function of the inventory process. Records are maintained in secure locations, both at the Museum and off-site (see Documentation section of this policy - § X). Because the collections are owned by Milwaukee County, status of inventories and location of inventory records are available to the Milwaukee County Auditor upon request.

VII. OBJECTS LEFT IN CUSTODY OF THE MUSEUM

"Objects Left in Custody of the Museum" are those objects which are brought to the Museum for purposes other than as loans (see Loan section of this policy - § IV). Such objects are usually for identification or

possible acquisition. These objects are not considered loans and are not covered by Museum insurance. A written record is created to register objects brought into the Museum. Identification of objects by Museum staff is a public service to the community. Although such objects will generally be examined by an appropriate staff specialist, Museum staff have no obligation to accept or identify objects. At the time of deposit, the Museum will inform the person leaving the object that the Museum may dispose of unclaimed objects after 60 days. It is the responsibility of the person leaving the object to retrieve it, should they wish to retain it. This will be conveyed to the person when they leave the object.

A. Museum Rights

Advance arrangement with curatorial staff is required for those wishing to donate objects or requesting identification. Unsolicited objects or unclaimed identification items may be discarded. Neither the Museum nor its staff may be held accountable for these objects. Security staff are not authorized to accept objects for identification or donation without first contacting the appropriate department.

1. Potential Acquisitions. The Museum retains the right to accept or reject objects brought in for the Museum's acquisition. Acceptance of objects to be considered for possible donation or purchase does not imply acquisition by the Museum. The Museum does not accept responsibility for unsolicited objects. If objects offered for possible acquisition are of high value or if they will be in the Museum for a significant period of time before a final decision can be made, the objects should be registered as a loan. If the Museum decides to accept objects for the collections, the Acquisition section of this policy (§ I) must be followed.
2. Disposal of Objects. Due to low value and the potential hazards of pest infestation to the Museum's collections, natural science objects brought in for identification will normally be discarded (without notification) after identification. For cultural objects, the Museum will make its best effort to notify individuals of the status of objects left at the Museum. However, if there is no reply, after 60 days the Museum will exercise its rights to ownership of this object and may either decide to keep or dispose of it.

B. Records

The Public Safety and Security department tracks all objects entering or leaving the Museum through a form which is countersigned by the Security Officer on duty. Outgoing objects require an authorizing signature. The form states the name, address, and telephone number of the individual depositing or removing objects, identifies the objects, and notes the reason for the action. Individuals leaving objects in the custody of the Museum must sign the form which verifies this information, informs them of Museum policy, and serves as a receipt. Individual departments are responsible for tracking objects left in their custody and for promptly informing the owner(s) when disposition is decided upon.

VIII. ACCESS TO MUSEUM COLLECTIONS

Use of the Museum collections is encouraged and objects may be accessed for various purposes: exhibition, research, educational programs, or promotional use by arranging loans or on-site visits. Objects are available for study based upon reasonable requests. However, the Museum must balance access to the collections and associated records with their long-term preservation. While generally striving

to make these materials accessible, there may be factors which restrict access. Preservation is always the first priority.

Each department shall establish guidelines for use of the collections in their care which ensure proper security, management (maintenance), and documentation of access. Permission to access or use the Museum collections for any purpose must first be obtained from the person in charge of the collection. For commercial or promotional use, additional permission is required from the head of collections or Vice President in charge of marketing

Staff are granted access to, and responsibilities for, only those collections areas to which they have been assigned, and then only in accordance with departmental policies. Access to other collections must be obtained from the appropriate person in charge of the collection or, if that person is not available, the next most senior collections staff member. Unless previously approved, unscheduled access to collections areas must be promptly reported to the person in charge of the entered location. Collections areas include all sites where collections are located, either permanently or temporarily: all curatorial areas, collections storage and work rooms, exhibit cases and dioramas, and Conservation, Education, Library, and Registration areas.

Information concerning accessing Museum collections through loans is covered in the Loan section of this policy (§ IV).

A. Access Guidelines

1. Availability, Requirements and Restrictions. The collections are generally available for study, provided access requirements are met and restrictions honored. Access to collections not on exhibit is based on a reasonable request which state both the specific object(s) to be studied and the reason for research, and is arranged with the appropriate curatorial department.

Availability of collections and their documentation is subject to the condition of the object(s), applicable state and federal laws (including copyright), other restrictions and general availability, such as accessibility to those on exhibit. While each department sets access guidelines, unsupervised access to non-public collections areas for any reason is never permitted.

Individuals allowed access may have certain requirements placed upon them, including advance written request and/or fees to cover incurred Museum expenses. Photographs or photocopies of collections objects or other materials may be made only with the written permission of the Museum. Each department is responsible for maintaining such a log for its collections. Records must be kept which state name, address, references (if necessary), and reason for access to the collections. All users of the collections are requested to provide copies of any publications resulting from access to that department's collections.

- a. Accessioned Collections. Inquiries concerning the accessioned collections should be directed to the appropriate department or to the Registrar. Requests involving extensive

research by Museum staff may be subject to compensation for staff time at a rate established by a written fee schedule. Details of costs are to be negotiated in advance with the appropriate department and prompt payment upon completion of work is required.

Access is approved based on specific requests. Unapproved access to other parts of the collections or documentation is not permitted and is subject to violation penalties. Written handling guidelines and instruction are provided by staff to all individuals dealing with the collections. In particular, visiting researchers, when allowed to handle collections objects, must be informed of appropriate and safe methods.

- b. Non-Accessioned Collections. The Museum's Archives, Library, Photograph, Education and departmental teaching collections are non-accessioned and generally available for access. This includes material formatted in print, audio, visual and electronic media. All are subject to the same general policy and restrictions, but have guidelines in accordance with their non-accessioned or informational status. Much of this material is subject to copyright law.
 - c. Collections Documentation. Collections documentation includes registration and documentation records, field notes and other associated records. Data are available to researchers subject to appropriate freedom of information legislation, privacy laws, and local and federal regulations. Restricted information generally includes collections value, physical location and certain donor information, as well as specific provenience for archaeological, biological or geological material of a protected nature. As with all Museum material, proper handling guidelines must be followed. Copies may be made or information provided in lieu of physical access, in which case copying costs may be assessed.
 - (1) Registration Records. Registration records (accession and catalog records) are available subject to the above restrictions. Access to original records, however, is limited and special arrangements are necessary due to their legal importance and the condition of the records.
 - (2) Associated Documentation. Field notes and other associated archival documentation are also generally available for research subject to previously stated restrictions. They may also have limited access depending on restrictions placed by researchers to protect culturally sensitive issues, informants or provenience. Such information may have time releases placed on them. Access may be delayed or unavailable due to ongoing research. Please refer to the Museum or departmental policies.
2. Special Needs Access. Access to non-public areas by those with accessibility issues requiring special assistance, such as non-English speakers, will require advance notification so that special

arrangements can be made for this level of service. Not all areas of the building are physically accessible, but every reasonable effort is made to provide access.

3. Electronic Data Access. MPM is committed to broadly sharing data concerning the Museum's collections. To facilitate access, collections data are made available via national electronic data sharing systems. Information concerning the collections is limited by general Museum access restrictions and the availability of information in an electronic database. Data are subject to change and there is an ongoing process of verification to improve its accuracy. The Museum provides these data "as is" and will not be held liable for damages due to inaccuracies. Individuals accessing collections data in this manner should correspond with the department responsible for the data to confirm accuracy of the information. Each department is responsible for determining what information is to be accessible.
4. Loans. Any requests for removal of objects or supporting material from the Museum are subject to Museum and departmental loan policies (§ IV).

IX. INTELLECTUAL PROPERTY

Intellectual property refers to products of human intelligence that are unique and/or have potential commercial value. Materials that may contain intellectual property that the Museum might have in its collections include images, photographs, drawings, manuscripts, field notes, maps, multimedia works, publications, objects in the collections, object data, etc. The materials containing intellectual property may be owned by the Museum or by others.

The Museum is committed to respecting and adhering to intellectual property rights laws including copyright, fair use, privacy, licensing, etc. The Museum strives to balance the public's right to access the collections with restrictions on how the collections are used.

A. Rights and Reproduction

All reproduction rights for photographic images, films, sound recordings and other media created by Museum staff, interns, volunteers or Museum-related individuals are retained and copyrighted by the Museum, unless they are in the public domain or are subject to previous written arrangements. The Museum retains reproduction rights for these works, as well as for any additional images or media in which rights have been transferred to or acquired by the Museum. All images remain the property of the Museum, unless stipulated otherwise. The Museum accepts requests to grant license to use and reproduce material in its collections or for which it holds the copyright. It reserves the right to charge for such use. Publication of any material requires written permission from the Museum and any holders of the copyright where necessary (See Rights and Reproduction Policy).

The Museum retains all reproduction rights for intellectual property resulting from any work created with substantial use of Museum resources, work specifically assigned or commissioned by the museum, work subject to non-Museum contractual or legal obligations and "work-for-hire." Documentation related to Museum objects (e.g., field notes, research notes, correspondence, images, etc.) made during Museum-

supported field work and research is generally regarded as the property of the Museum, unless other contractual arrangements have been made between the Museum and the researcher. All requests for use and reproduction of these materials must have the authorization of the person in charge of the collections. All rights, including copyright, on the products of original research (e.g., datasets, draft manuscripts, some images, etc.) done by Museum staff remain with the staff member. However, the Museum retains the right to copies of this research, as well as the opportunity to negotiate for joint reproduction rights.

Datasets such as taxonomy, geography, morphometrics, sex, preparations, etc. are considered to be fact and cannot be copyrighted. Unless there is sufficient and obvious discernible creative expression used to create and modify the dataset, it is the policy of the Museum to consider it not copyrightable.

X. DOCUMENTATION

Proper documentation and preservation of data concerning the Museum collections are fundamental for good collections management and critical for educational and research purposes. Collections records are kept as up-to-date and accurate as possible.

Non-active records, such as the correspondence of previous curators, are deposited in the Museum Archives. The Collections Access section of this policy (§ VIII) covers use of these materials. The departments are responsible for maintaining inventory records.

A. Records Kept

1. Standards. The Museum maintains records of legal ownership of collections, generally in the form of a Deed of Gift or purchase receipt though other formats may be acceptable. Basic records include a catalog record, current location, prior history of ownership and all activity associated with the object(s) (loan, exhibition, conservation, deaccession histories).

Each department establishes written policies and procedures in accordance with recognized museum standards within its discipline for collections records as well as supplemental materials. Records may be maintained in physical and/or electronic format. Periodically an updated hard copy of accession and/or catalog records is made.

2. Timeliness of Records. Donations are acknowledged promptly and records (accessioning and cataloging) are made as expeditiously as possible. They are updated with new information, as obtained, on a timely basis. An annual review of the status of uncompleted accession records is made by the Registrar.
3. Numbering. The assignment of a unique number (generally catalog and/or accession number) to an individual object or lot creates the association between the object and its documentation. This number is affixed to the object, its container, or its mounting media in such a way as to be archival and reversible.

4. Responsibilities. The Registrar develops accessioning standards for the Museum as a whole, and is responsible for those documents which record ownership, loans, and other legal matters. Collections staff (including Library, Photography, and Education departments) create and maintain descriptive catalogs, records of location and movement, and data concerning the collections (such as field notes, correspondence, etc.) in a variety of formats. Records of object condition and treatment as well as environmental monitoring are maintained in Conservation.

B. Records Preservation

Collections records are maintained permanently by the Museum. This includes identifying records of prime importance (accession, catalog records, field notes), providing for their physical preservation needs, and duplicating them for preservation and off-site storage.

1. Physical Preservation. Proper handling and storage are as important for the physical preservation of collections records as for the collections themselves. The Museum provides an appropriate stable environment and housing, uses archivally sound materials and methods, and maintains fire-proof vaults, fire-proof storage cabinets and off-site storage arrangements in data storage facilities. If the physical document is deteriorating and if maintaining its original format is not essential, it may be archivally reformatted.
2. Duplication. Duplication provides physical preservation by limiting handling, risk management in disaster recovery situations, and for access. The Museum maintains both physical and digital copies of primary written records (catalog and accession ledgers) both on-site and offsite. Other vital records such as inventory records, important documentation, field notes, legal transactions concerning the collections, etc. are also duplicated in an appropriate manner. Individuals responsible for the Museum's electronic catalog databases are responsible for backing up collections information on a regular basis.
3. Responsibilities. The Registrar is responsible for the duplication of accession and catalog records. Collections departments are responsible for their respective collections records (field notes, etc.). The Registrar maintains a collections record survey which locates both registrarial and curatorial documentation throughout the Museum. Individuals responsible for the Museum's electronic catalog databases are responsible for backing up collections information on a regular basis. The Library Department is responsible for Museum Archives kept in the Library.

C. Other Collections Related Documentation

Individual departments and staff maintain records and files of collections associated documentation. Field notes, research data, and correspondence related to Museum records should be deposited either with the appropriate department or the Museum Archives. Upon permanently leaving the Museum, curators and other staff are required to make arrangements concerning the disposition of documentation in their possession. Records or copies of collections documentation and field notes related to the collections, of a non-research nature, must be deposited with the Museum. In most cases, however, duplicates (and in some circumstances originals) may be taken with the departing staff member. However, all situations are subject to use restrictions as determined by the Museum.

Although these conditions do not apply to a staff member's individual research notes and files, staff are also encouraged to deposit copies of such materials with the Museum. Such personal research, field notes and data left at MPM cannot be accessed or published by other parties without the permission of the researcher prior to their death.

Written agreements should be made concerning final disposition of all research data. The preferable location is with the Museum, but other national or recognized repositories may also be acceptable. Provisions for the storage of electronic field data are also encouraged.

XI. INSURANCE

The Museum seeks to identify, reduce, and when possible, eliminate risks to the collections and the Museum. Insurance is part of this risk management. It is not a substitute for proper care for the collections. The Museum arranges for collections insurance through the Office of the Milwaukee County Risk Manager. No actions may be taken concerning the Museum's collections insurance without the approval from that office.

Other Collections Policy areas which include information concerning insurance are Loans (§ IV), Care of Collections (§ V), Inventory (§ VI), and Objects Left in Custody of the Museum (§ VII).

A. Coverage

An insurance policy is carried which covers all Museum collections, objects formally on loan to the Museum, and any other material the Museum is obligated to cover under contract. Such insurance is, or provides the same level of coverage as, a standard Fine Arts insurance policy (all-risk, wall-to-wall and carries standard and/or recommended clauses and exceptions). Museum collections are covered for fair market value (see Valuations below).

Borrowers must provide, when requested, the same level of insurance that the Museum carries and provide a Certificate of Insurance indicating carrier, dates and amount of coverage upon request. The Museum will provide a Certificate of Insurance to any lender upon request. If the Museum elects to maintain its own insurance for items it lends, it will supply, upon request, a Certificate of Insurance to the borrower.

Objects left in custody of the Museum for examination, identification, possible acquisition, etc. are not covered by Museum insurance. Individuals depositing material for these purposes are informed of this policy in a written form. If insurance coverage is deemed necessary or appropriate, the material should be formally loaned to the Museum.

B. Valuations

The value of Museum collections is generally based on fair market value or replacement value. Fair market value is defined as the price an object would sell for if there were a willing buyer and a willing seller (the current cost of similar objects on the open market). Value for scientific collections is usually based on the

costs to replace a specimen (such as collecting expenses). Value established for Museum collections insurance purposes may be based on curatorial knowledge or come from an outside appraiser. Value for material on loan to the Museum is based on information supplied by the lender. If no value is supplied, the Museum may set a value for insurance purposes only, but any value stated is not to be construed as an appraisal.

C. Responsibilities

1. County and Museum. Milwaukee County owns the Museum's collections and insurance is arranged through the office of the Milwaukee County Risk Manager. That office consults with the appropriate Senior Management Staff and the Museum Registrar to determine the coverage required based on information supplied by the collections staff. Individuals responsible for collections are also responsible for determining as accurately as possible the value of items in those collections for insurance and loan purposes. While not appraisers, they should be well enough informed of current values to make this possible. The Registrar maintains records of the Museum collections and loans for insurance purposes, arranges special needs insurance, and coordinates, through the County, the filing of any claims made against the Museum's insurance policy. It is critical that no staff member do anything which might jeopardize the Museum's insurance coverage. Collections staff must be familiar with the collections insurance policy so that they are aware of actions which might cause loss of coverage (such as agreeing to payment of damages without approval from the County Risk Management office and the insurer).
2. Records. Documentation which must be kept includes a record of all material covered by the policy with values and locations. Accurate inventories and photographs, particularly of high-risk materials, are vital should the need arise to file or defend a claim. Condition reports are made of all incoming or outgoing loan material. Reports, with photographs, of any incidents involving the collections insurance are made and kept on file.
3. Reporting. All collections staff are responsible for promptly informing the Registrar of loans, damage, theft, or other situations which involve the Museum's insurance responsibilities. Any losses involving the Museum's collections or other material which the Museum is obligated to insure must be promptly reported to the appropriate section head, head of collections, the Museum Registrar, and the CFO. Depending upon the nature of the loss, Security may also need to be notified. Theft, arson or other criminal actions must also be reported by staff to Museum Security who, according to established protocol, will contact appropriate law enforcement officials. Milwaukee County Risk Management, which handles all claims made against the Museum's collections insurance policy, must also be promptly notified.

XII. STANDARDS OF CONDUCT

The Museum staff follows the Codes of Ethics as established by professional museum and other applicable organizations. These include the International Council of Museums (ICOM), American Alliance of Museums (AAM), Natural Science Collections Alliance (NSCA), Society for the Preservation of Natural History Collections (SPNHC), American Association of State and Local History (AASLH), American Institute

of Conservation (AIC), and other codes as established by professional disciplines and sub-disciplines. Ethical issues directly concerning collections (appraisals, identifications/authentications, and personal collecting) are covered here but are also subject to the Museum's Code of Ethics.

A. Appraisals

An appraisal is a professional opinion on the fair market value of an item. In general, a fee is involved for these services. Museum Staff do not appraise private collections or material being donated. An individual requesting an appraisal can be directed to qualified appraisers such as members of the American Society of Appraisers. More than one name should be provided and staff must avoid all appearance of favoritism or of creating referral relationships with professional appraisers. Individuals may also be directed to publications which may be of assistance in establishing the value of materials. Commonly recognized standards for establishing the values of natural history materials may be indicated.

Determining fair market value for the collections is important for a number of reasons: for insurance purposes, to recognize fair purchase prices when acquiring material for the Museum, and for deaccessioning purposes. Individual departments make every effort to establish fair market value by whatever applicable and qualified means, but staff should only establish values for Museum material in areas for which they have expertise. There may be times when qualified outside appraisers may be recommended or needed.

Appraising materials for other museums and non-profit institutions by Museum staff is a complicated matter requiring the utmost avoidance of real or perceived conflict of interest. Notification and approval by the head of collections and the President/CEO are required before agreeing to appraise another museum's collections. While not a formal appraisal, qualified staff may provide valuation guidance to other museums.

B. Identifications/Authentications

Identifications are judgments made to the best ability of a person and represent an informed opinion, but do not carry any guarantee. Authentications are written documents which provide professional judgments regarding the identification, authorship, date, etc. of material. Authentications imply legal responsibility or guarantee for the information.

Qualified Museum staff may offer identifications of material. However, they do not make authentications for private individuals or commercial firms. Staff should not make identifications in areas in which they do not have the expertise and should recommend other staff members or outside individuals or museums for these identifications.

C. Personal Collecting

Collecting is defined as acquiring significant numbers of objects. Small quantities of objects for personal enjoyment, inheritance of collections materials or collections acquired prior to employment at the Museum are not generally considered to be collecting. It is generally recommended that Museum Staff and the Board of Directors refrain from personal collecting in areas where the Museum also collects.

However, staff who do engage in personal collecting in other areas should be careful to avoid competition with the Museum, and real or perceived conflicts of interest. In particular, members of the curatorial staff are restricted from personal collecting in the collections areas for which they are responsible.

In general, Museum Staff and the Board of Directors must not deal (buy and sell on a commercial basis as opposed to doing so for the purpose of improving their personal collection) in any materials the Museum collects.

Staff and Board members who do collect or deal/sell must make a full disclosure of all collecting activities to their supervisor and the head of collections and, in the case of Board members, the President/CEO. They should be especially observant in their relationship with dealers to give no real or apparent reason to believe a special relationship exists. They must not use their position at the Museum to further their own acquisition or material gain. Nor should they use Museum space, time or materials to prepare, work on or store those collections, unless they are related to their research and have made prior arrangement with appropriate written authorization.

It is recommended that individuals who have objects within the Museum's scope of collecting should give the Museum first refusal when disposing of items in their collection. Should the Museum have an interest in these private collections, it is urged that they be bequeathed to the Museum.

Appendix I.

Definitions

Archives

Records preserved because of their continuing value, includes but is not limited to documentation of the Museum, its collections, and associated personnel, such as field catalogues/field notes, books, correspondence, ledgers, catalog, cards, images (e.g. photographs, drawings), object tags/labels, and ephemera. This documentation can be written, digitized, or born-digital in format.

Bequest

A means of acquisition whereby the title for an object or group of objects passes to the Museum under a will. Bequests may also be financial in nature.

Disposal

The process of getting rid of an object that has been deaccessioned.

Department

An organizational unit within the Museum with oversight of a particular area of activity. The management of each permanent collection falls under the oversight of a department within one of two Sections – Natural Sciences or Cultural Sciences. These Sections and the Registrar Department are part of the Division of Collections and Research. Additional Museum departments oversee aspects of programming such as exhibits and education. While individual departments are responsible for managing collections, departmental procedures must adhere to this policy document. Departments may not create or implement individualized policy.

Direct Care

The provision of services to an object that requires some degree of interaction between the object and Museum Staff or a contractor. Direct care may involve many aspects of collections care. Examples include improving storage conditions, enhancing documentation or databasing, performing conservation, or implementation of a collections management & care plan. Direct care does not include the remuneration of Museum Staff for performing ordinary duties, but may include expenses paid to a contractor for specialized care (specific or technical conservation services, for example). It does not include general operating expenses such as building repairs.

Gift

The offer of property from the donor to the donee, the acceptance by the donee and the physical transfer of the property from the donor to the donee.

Head of collections

The head of collections is the employee in a Senior Staff position that oversees all the collections areas.

Loan

Temporary transfer of a collections object from the Museum to the custody of a second party for a specified length of time, without a transfer of ownership or ownership rights taking place.

Museum

The Milwaukee Public Museum Inc. is a 501c3 that operates the Milwaukee Public Museum (MPM), a public-private partnership between the Milwaukee Public Museum, Inc and Milwaukee County. The collections and building are managed under a Lease and Management Agreement between the two entities.

Object

Any specimen (an individual animal, plant, piece of a mineral, etc. used for study or display), artifact (an item of cultural or historical interest, typically made or altered by a human being), archive, or unit containing a combination of the three.

Person-in-charge

Person-in-charge refers to the employee with immediate responsibility for a particular Museum collection. If more than one person can be considered as having immediate responsibility for a particular collection, then the person-in-charge is that employee occupying the highest level, according to the Museum's current organizational chart, within the specified collections area. In most circumstances, the Person-in-Charge is the Collections Manager or Curator of Collections for each department.

Policy

A guideline that regulates organizational action.

Procedure

Specific instructions for enacting and carrying out a policy.

Section

An organizational unit within the Division of Collections and Research. There are two sections (Natural Sciences and Cultural Sciences) which are further divided into departments.

Section head

A section head is the employee to which some, but not all, curatorial employees and persons-in-charge report and who reports to the head of collections. In the event this position does not exist or is not filled, the authority of section head resides with the head of collections.

Work for Hire (WFH)

Work for Hire is a work created by an employee as part of his or her job, or some limited types of works where all parties agree in writing to the WFH designation.

Appendix II.

Inventory of Policies and documents referred to in the Collections Policy. Policies listed below are not appended to this document due to differences with their internal approval process.

AIC "Code of Ethics and Standards of Practice"
Collections Access Policy
Collections Digitization Policy
Documentation Policy
Library Collections Policy
Living Collections Policy
Museum's Repatriation Policy and Procedures
Rights and Reproduction Policy
Standards for the Exhibition of Collections Objects
Teaching Collections Policy
Vault Policy
1993 Wisconsin Act 18 (legislation for obtaining title)