

A Guide to Collection Rationalisation



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Introduction

How do you gain a deeper knowledge and better control of your museum collection?

Collection rationalisation contributes to the responsible management of your museum and its assets. It is an ongoing process and improves the collection over time. It can be challenging, but it also helps your museum and its stakeholders to understand and value their collection.

The process involves an inventory and a review, including examining institutional records; assessing significance and meaning against criteria; and evaluating collections for their condition, safety, and storage needs. These primary responsibilities enable managed and sustainable collecting practices. They may also lead to the consideration of deaccessioning and transferring or disposing of some items.

Ethical deaccessioning and disposal can only take place within established policies and procedures. Sound collection management policies that include documentation, acquisition, and loan procedures are central to good museum practice. These will help you avoid some of the collection issues that many museums face.

Many museums face a legacy of uncontrolled collecting. This resource is a guide to help you rationalise your collection.



Improving collections through rationalisation

What is collection rationalisation, and why do it?

Collection rationalisation can be defined as *systematically refining collections to align them to the museum's stated purpose, and to improve their value to the museum, its visitors, and users.*

Museums hold collections in trust for their communities, and for a museum to use its collection effectively for all its purposes, a deep understanding of the collection is vital.

A well-organised collection rationalisation project will result in a better understanding of the history, connections, and meaning of your collection.

Controlled rationalisation enables museums to develop a systematic and strategic approach to effective management and increased use of their collections, allowing them to maximise resources, refocus collecting activity and increase public access. Although one clear outcome of a programme of rationalisation can lead to disposal of objects, rationalisation can also provide ways of considering new and different uses for collections.¹

Rationalisation is also a sound way of assessing the needs of the collection for funding, access, storage, expertise, conservation, preservation, and preparation for any future returns or repatriation. Reviewing collections can contribute to better planning, and to making the museum more economically sustainable by reducing administrative, storage, and handling costs. Deaccessioning and disposal are a possible result of the process, and it is essential that robust collection management practices and ethical procedures, including deaccessioning and disposal policies, are followed.

Connecting with communities

It will help you to connect with wider audiences if you learn what groups and individuals with diverse backgrounds, special knowledge, and interests think, know, and want to know about your collection. A collection rationalisation project can be a platform for creating new relationships, growing your volunteer base, expanding collection uses, and improving the social and financial sustainability of the museum.

Museums also benefit by encouraging study and comment on their collections. Tap into all sources of information! The expertise and understanding of your local hapū, iwi, and groups outside the museum, and of colleagues in other disciplines, is invaluable – and an opportunity to work collaboratively. Small museums, heritage entities, and isolated communities may need to reach out further for advice, however, looking locally is often a good place to start. There may be someone in your community who knows a lot about the history of your collection.

Always consider Treaty of Waitangi Te Tiriti o Waitangi obligations to work in partnership with iwi Māori. At the earliest stage in any process, hui need to be held with the museum's iwi, hapū, expert practitioners, and key stakeholders so guidance and support can be discussed early enough to ensure protocol or tikanga aren't transgressed.



The expertise and understanding of your local hapū, iwi, and groups outside the museum and of colleagues in other disciplines is invaluable and is an opportunity to work collaboratively. Photo: Rachael Hockridge.

¹ Collections Trust *A guide to selecting a review methodology for collections rationalisation* Heather Lomas | November 2014 P3

Collection collaboration

Collaborate with other organisations in your area, and in other regions, who may have a similar collection scope. In this context, set boundaries for your collecting: geographical areas and time periods as well as subject matter and object types. Some museums specialise in particular subjects, for example, medical, technological, photographic, industrial or textiles, and they may be a better fit and more able to care for some objects in your collection. Working with other museums to develop a regional collecting strategy can improve the focus on each museum's unique stories and avoid unnecessary duplication.



Working with other museums to develop a regional collecting strategy can enable organisations to focus on each museum's unique stories and avoid unnecessary duplication. Photo: Judith Taylor.

Solving the legacy of past practices

Museums often face a legacy of uncontrolled collecting. This leads to pressure on resources and storage space. There may be items in storerooms that are not part of the collection: ancestral human remains and taonga that may need to be repatriated; loans that may be overdue for return; and objects that are a possible hazard to staff and visitors, or that have deteriorated beyond remediation. Some items may have lost their provenance and significance because of changes in collecting interests, becoming dissociated from records, or missing labels.

Offloading museum objects by selling, disposing, or transferring them may seem like a solution, but it is not. Careful deaccessioning needs clear policies and delegations, management, and consideration – it is best determined by a collection rationalisation project that involves several steps.



Some objects are a possible hazard to staff and visitors or have deteriorated beyond remediation. This manicure set deteriorated beyond remediation mainly because of the materials used to make it. It was deaccessioned and safely disposed of. Photo courtesy of Hokitika Museum.

A detailed, considered, procedure to identify what material must be retained and what material should be deaccessioned is essential.²

At the end of a collection rationalisation process some objects may have new meaning for the collection and some may clearly not belong.

Some benefits of collection rationalisation

- Encourages collaboration with other collecting organisations and the development of regional strategies.
- An opportunity to work with iwi Māori.
- Extended uses for the collection, for example, new exhibitions and public programme ideas.
- Exploration of public engagement, research, and formal learning potential.
- Appraisal and valuation support accountability and asset management.
- Verification of title and ownership.
- Collection scope is reviewed or revised.

² Simpson, Shane, and Ian McDonald. *Collections Law and Ethics; Galleries, Libraries, Archives and Museums* 2025

- Loans are reviewed, renewed, recalled, or returned.
- Items may be returned to rightful owners (restitution).
- Repatriation can proceed.
- Documentation is improved through research.
- Security is improved by knowing where and what items are.
- Better basis for planning storage solutions and the improved care of items.
- Condition of collection items can be assessed.
- Previously hidden or unrecognised items of significance may be discovered.
- Conservation needs can be collectively assessed and form the basis for funding applications.
- Improved cataloguing, description, and interpretation increases accessibility for all users and purposes.
- Supports development of online collection services, contacting new or hard-to-reach audiences.



Collection rationalisation can help extend uses for the collection, for example new exhibitions and public programme ideas and exploration of public engagement, research and formal learning potential. Photo: Jo Moore.

Planning a deaccessioning project

Undertaking a collection rationalisation project requires the commitment of resources: people, time, and space. It also involves support from governing bodies, staff, and volunteers.

Take plenty of time to consider your organisational mission, trust deed, collection policies, and collection scope before you start. Having collection management, accession, and deaccession policies in place is essential.³ Altogether, these basic documents outline the museum's legal status, focus, scope or speciality, underlying purpose, core functions, physical area, communities, and audiences. Always assess your collection and make decisions with these policies in mind. Revise key documents if they need updating. Make a project folder or file to hold all your plans, procedures, and policies in one place. The New Zealand Museums Standards Scheme provides a folder and framework for this work.⁴

Identify who will work on your project

Do they have enough time for this work? Are there any possible conflicts of interest? Be clear and document who will do the work and who will take responsibility for final decisions. It may work best to have dedicated staff or a volunteer group who focus on this project. Consider applying for funds for the project.

Find out about the history of collecting and practices at your museum

This may include any previous deaccessioning and disposal activities. Every museum is different. It's important to understand your institution's origins and founding principles. Knowing when and why a museum was created, and about its key figures, directors, staff, and collectors, helps to clarify the purpose and major collecting focus of the institution, and to contribute to knowledge about the wider history of collecting in Aotearoa.

Libraries, archives, art galleries, and museums have different policies and procedures

Archives, for instance, have embedded practices of appraisal and disposal. Libraries have standard types of items they deal with and a standard way of cataloguing. Museum systems are not consistent, deal with a wide range of object types, and regard deaccessioning and disposal differently. Some museums have only recently begun to use digital databases with defined fields for recording information. Other museums only have paper records. You can expect to find inaccuracies and omissions in the records.

Creating clear collection management policies and methods, and acquisition and lending processes, will help avoid future issues.

Museum terminology, systems and practices have not been consistent across time or institutions. Informal systems and terms were often used. For example: old loan, long term loan, permanent loan, loan in perpetuity, on deposit, held in custody, are all terms that may have been used within museums in the past and may mean different things in each organisation.⁵ Descriptions of items may be inaccurate and inconsistent. This is more likely to be the case when objects came from more unfamiliar sources. In the past some communities such as iwi Māori, Asian, Pacific were less likely to have been consulted or employed in museums. Museums now try to make those connections and deepen the understanding of objects and records through working closely with groups or individuals that have a special association with, or knowledge about their treasures that have often been out of sight and overlooked in museums.⁶

³ See He Rauemi 16

⁴ New Zealand Museums Standards Scheme

⁵ <https://www.tepapa.govt.nz/assets/76067/1687925610-managingloans-herauemiresourceguide.pdf>

⁶ <https://www.tepapa.govt.nz/assets/76067/1687925534-16-developing-your-collection-acquisition-and-deaccession-policies.pdf>

Carrying out a collection inventory

An inventory is a relatively straightforward way to begin a review of your collection. An inventory is an itemised list of

objects that a museum has accessioned or is holding. Items must be physically located by an examiner and recorded in a spreadsheet. Some collection management systems (CMS) have inventory databases already set up.

An inventory can answer many questions about the collection and save you time because the information is all in one place. It is also a key tool for accountability. It will ensure your objects are more easily found for display and research.

By the end of the inventory process, you will know what you've got and where it is. You can then start the more time-consuming work of making sure your collection is fully catalogued and documented.

An audit or inventory of some or all of your collection is often required for reporting or insurance purposes. This also involves examining objects; object information; verifying locations; and checking authenticity, information accuracy, and collection-object relationships.

An inventory can help you address these common collection management problems

- **An accumulated documentation backlog**
Recent (and sometimes not so recent) entries that are awaiting accessioning decisions, labelling, and cataloguing. These will be items that have all the relevant acquisition details and you know they have not been accessioned. In some cases there may be objects with entry numbers dating back many years, although no decision has been made on whether or not to accession them.
- **Objects with no numbers or duplicated numbers**
There may be items in storage with no accession numbers or items that share the same number. These could be items that have not been accessioned, have been mistakenly numbered, or they have been accessioned and have lost their numbers.
- **Objects and documentation that don't match**
There may be objects with numbers that do

not match to any documentation. For example, numbering sequences that don't match accession registers, objects that don't match the description in the accession register, or collections that have been renumbered several times so that objects have more than one number.

- **Documentation where you cannot find the objects**
There may be records for objects in your accession registers or catalogue records that you cannot find. These items may have gone permanently missing; they may be in your collection but have lost their numbers; or your museum's location and movement control is poorly managed.
- **Inadequate storage location information**
In addition to problems with accessioning, catalogue information will vary. Some items may be uncatalogued, some in manual catalogues, and some on computer catalogues. Location records can vary greatly in quality.

This outline (above) is from 'Retrospective Documentation', which includes suggested procedures for carrying out an inventory.⁷

Knowing every object in a museum, location, legal status, history and condition, how it is to be stored and exhibited is part of being accountable.⁸

Who will do the work?

Identify who will work on your project. Do they have enough time for this work, and are there any possible conflicts of interest? A committee, board or staff member, or volunteer who has a strong personal interest in collecting a certain type of memorabilia may not be the best person to be closely involved. Be clear and document who will do the work and make the final decisions.

Before starting an inventory, think about the allocation of time, resources, and people that will be needed. Checking and recording 20–30 items a day is achievable with a small staff.

⁷ 'Retrospective Documentation', Collections Trust, 2015

⁸ Buck R A and Gilmore J A. *Collection Conundrums: Solving Collections management Mysteries* AAM. Washington. 2007, p79.



Over four months in 2020 Project Ark in Southland carried out an inventory of the collection at Te Hikoi Museum in Riverton. Front to back: Eve Welch, Photographer, Samantha Chandler, Collection Technician, Sarah Robinson, Researcher and Cataloguer and Laurence Le Ber, Collection Technician
Photo: David Luoni.

Project Ark is a project to spark the cataloguing and digitising of Southland's museum collections. Over four months in 2020 Project Ark in Southland carried out an inventory of the collection at Te Hikoi Museum in Riverton. The inventory was co-ordinated by Sarah Robinson with support from three full time team members. The team processed approximately 50 items a day including reconciling and checking collection records, entering identification information, object type, general condition and current locations into an excel spreadsheet, which was then bulk exported into eHive CMS to create skeletal eHive records for later cataloguing. This inventory did not include any photography of the objects. Looking at other projects can help you consider the scale of project you can achieve and the resources that may be needed.⁹

An inventory can be carried out by collection subject, object type, or by storage area. For some organisations, inventory is ongoing, with staff rotating continuously through different areas, checking objects against records as part of their regular accountability processes or when reorganising a collection store. Other museums tackle an inventory as one large project and seek additional funding and resources

to carry it out. Pilot an inventory methodology with a small sample of the collection, and then revise and document how you will carry it out.

What an inventory project includes

- Researching the legal and ownership status of each object by searching all your documentation systems.
- Checking if any unnumbered items match existing documentation. Identifying and, if possible, resolving any anomalies in the collection records.
- Involving subject experts to help identify and assess objects.
- Summarising findings and comparing the listed objects with similar ones held in the collection.
- Checking the physical condition of items.
- Gathering additional information by talking with previous staff members, and consulting with source communities and specialist experts, for example, iwi Māori practitioners.
- Identifying that some objects have new meaning for the collection or that some items have no clear place in your museum's collection or are hazardous.

Ownership research and verification

A museum does not become the owner of an object just because of the length of time it has been at the museum. The museum may be the holder or borrower of items and not be the legal owner. Check how the items came into the museum and if there are any recorded restrictions, for example, the donor has to be informed if the item is taken off display.

A museum is only able to easily transfer ownership if it legally owns the object or has the permission of the owner. This is one of the most important aspects of the deaccession process. Do everything possible to establish ownership and record in detail what steps were taken. Without this record of due diligence, an object cannot be deaccessioned.

There are several ways items may have come into the museum, and an array of documents to check, some of which may have conditions or restrictions attached:

⁹ David Luoni, Project Lead. Project Ark, Southland Regional Heritage Committee. Email. 11 April 2020.

Donations

A donation is an agreement to transfer ownership (title) to the museum. Check any conditions or restrictions attached.

Gift

A gift is usually free of binding conditions.

Bequest

A gift made through a legal process and documented in a will. Acceptance means legal transfer of title to the museum.

Subsidies or grants

An item may have been conserved or purchased with funds from an external source, which may have implications for future decisions.

Loans

Check loan agreements. If the owner is no longer traceable you should take legal advice about proceeding to deaccession.

Contested

This applies to situations where the identification, categorization, or acquisition pathway of a taonga in the collection is questionable.

You can also check:

- entry records
- accession registers
- catalogue records
- object history files
- minutes of meetings at which acquisitions were considered or reported
- annual and meeting reports
- correspondence
- entry or daybook records
- exhibition catalogues
- field collection notes
- financial records
- indexes
- labels
- newspaper cuttings
- research notes
- objects themselves
- objects taken home by past staff or volunteers
- staff memory
- transfer of title forms.

Provenance research

In the context of museums, provenance refers to the origin of an object as well as its ownership history. Establishing ownership is a critical step towards deaccessioning. It is much more difficult to deaccession items for which you do not have a clear title. Provenance is closely connected to establishing significance.

The following is a good example of a provenance research process:

1. Identify objects in your collection inventory to research.
2. Physically check that what is recorded matches with what is physically there.
3. Bring together all available information (identifying what is known).
4. Identify what further information is needed.
5. Search out and obtain the further information.
6. Create a way of collating this information.
7. Confirm all information (that is, cross-check that all information is correct).
8. Create a report of findings.

Other considerations when researching collections:

- A collection is more than the sum of its parts.
- What is the individual object's association with the whole collection?
- The history of the whole collection, as an entity in itself, is important.
- Parts of previously undiscovered institutional history reflected in objects may need to be safeguarded.
- New information, processes for conservation, and new insights may become available in the future.

Assessing significance

It may not be obvious which items in your collection are important. Sometimes this is because not all the details about the item have been recorded, or because details of importance or provenance have

been lost. Even ordinary items can have significance because of their connection with a person or event.



Ordinary, everyday items can have significance. Loss of information through lack of documentation or dissociation from labels or records means connections and significance are lost. Photo: Jo Moore.

Without an objective assessment of a collection item, it is not possible to understand its significance within the wider collection and to the community. Discovering new information about objects can also help give respect and value to collections and make connections between items. Significance assessment is an important tool to help assess, guide, and manage collections: it will help develop a sense of an object's place in the collection. As a day-to-day tool, significance assessing can also keep you on track with focused collecting. It is a method that helps museum staff and volunteers understand why and how collections are valued and by whom.

Research methodologies for significance assessing have a range of criteria that an object can be assessed against. National, regional, and local significance can be associated with specific sites; be connected to major themes; have symbolic, social, cultural, spiritual, or artistic meaning; have documentary, scientific, or educational use, or rarity value; or be representative. Completeness and condition are also contributors to significance.

Important methodologies for assessing significance include *Significance 2.0: a guide to assessing the significance of collections*,¹⁰ and guidelines from

¹⁰ The Collections Council of Australia. *Significance 2.0: a guide to assessing the significance of collections*. 2009.

Heritage New Zealand, which offer useful descriptions of heritage significance in the New Zealand context and detailed information about working with tangata whenua. Criteria take into account the views of different groups – from iwi or hapū to community groups, and experts in a particular field.¹¹



Your museum's collection policy guides what will and won't be collected. Any offer has to be carefully considered and documented to avoid future deaccessioning dilemmas. Mairi Dickson, Waikaia Museum begins to consider a donation offer. Photo courtesy of Waikaia Museum

Assessing significance is a useful method for individual items, groups of items, and whole collections. It can be very helpful to bring in expertise to carry this out, alongside staff. It is best to involve more than one person when assessing significance.

Significance assessment involves five main steps

1. Describing an item or collection.
2. Researching its history, provenance, and context.
3. Comparing the item or collection with similar ones.

¹¹ Heritage New Zealand. *Significance Assessment Guidelines: Guidelines for Assessing Historic Places and Historic Areas for the New Zealand Heritage List/Rārangī Kōrero*. 2019.

4. Understanding values by referring to the criteria below.
5. Summarising the item's meanings and values in a statement of significance.

Four primary criteria to apply when assessing significance

1. Historic
2. Artistic or aesthetic
3. Scientific or research potential
4. Social, cultural, or spiritual

Four comparative criteria to evaluate the degree of significance

These are modifiers of the main criteria:

1. Provenance
2. Rarity or representativeness
3. Condition or completeness
4. Interpretive capacity

The use of an already developed significance rating system, with either a numerical or alphabetical rating scale, for example, 1–20 or A–P, is recommended. An overall rating of significance can be used to contribute to overall decision-making, and to help identify objects for potential deaccessioning, in conjunction with other assessments and criteria.

Also consider whether the object is outside the scope of the collection

If a collection item doesn't fit with the goals or mission of the museum, or its type is not included in the collection policy or collecting plan, it may be considered 'outside scope'.

Would deaccessioning the item improve the overall collection content? Would it decrease the burden of caring for too many objects or very large objects? Can the object be substituted by a digital version, or borrowed from another institution if needed?

Your collection policy might be quite specific about certain objects, for example, stating that large machines from outside your museum's region will not be collected.



Machinery or items from another region may be out of scope of your collection policy. Photo: Judith Taylor.

Making an assessment of out-of-scope requires sound judgement by an informed group, with outside advice if needed. Use caution when deaccessioning objects in this category as there can be exceptions.

Appraisal

An appraisal is an expert estimate of the value of something. The term 'appraise' means to place a value on, rate, or judge. Appraisals of museum objects are usually made to determine monetary value and are often for insurance purposes, especially when items are being loaned out. They must be carried out independent of staff or their associates, except for items of established low value.

Appraisal is recommended for collections where items have any intrinsic or market value and are being considered for deaccessioning or disposal. This is a method used for establishing market value. It is not used for establishing overall significance or to be used in isolation.

Note that appraisal as it refers to archival practice has a different meaning, and here it describes the process of deciding which items should be retained in an archival group.¹²

Why appraisal is important

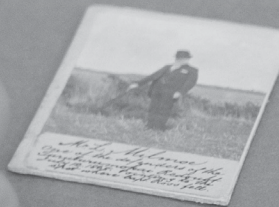
It helps to:

- make sure that any proposed deaccession is credible and equitable

¹² Managing and preserving community archives: <https://natlib.govt.nz/>

- If no records or information about an object are found, and subject specialists and source communities are also unable to provide any information, and the item is not relevant to your collection, you may want to consider deaccessioning it.

If no records or information about an object are found, and subject specialists and source communities are also unable to provide any information, and the item is not relevant to your collection, you may want to consider deaccessioning it.



What is deaccessioning?

Deaccession is an administrative decision-making process that results in an accessioned object's removal from the museum's collection. In the art world, because of high values and media attention, some deaccessions are very controversial. Museums' codes of ethics have developed and defined what is regarded by the sector as acceptable practice.

Most museums face rising costs for storing, conserving, insuring, securing, and documenting collection objects. So following a collection review, careful deaccessioning is needed by most museums, especially to remedy previous uncontrolled collecting.

In Aotearoa some museums have been building their collections for more than 100 years. Past collecting practices were not always guided by policy and resulted in museums becoming 'community attics', places where old and unwanted items were deposited regardless of any real significance.

Some objects, acquired in good faith decades ago, may turn out to be without provenance or significance, illegally acquired, or to be fake or stolen. New information sources, and changes in attitudes and resource levels, mean that collections often need to be adjusted to better serve the museum's purposes and to make best use of resources.

Deaccessioning is now accepted practice in museums.

Deaccession can be contentious

Museum codes of ethics (MA and ICOM) state there is a strong presumption against deaccessioning, so consideration needs to be thorough and well-documented. However, deaccessioning need not be controversial if transparent and ethical practices are followed (see risks below).

Deaccessioning is a tool for managing collections, which need to grow and change – and it needs to be balanced against preserving the integrity of systematic, named, and historic collections and mitigating risk to the museum. These risks can be minimised by following clear, ethical procedures and by being careful, transparent, and responsible.

Deaccessioning and disposal policies and plans

Deaccessioning and disposal guidance should be included in your collection management policy and plan. These are the responsibility of the institution's senior management and the governing entity (such as

Though these money boxes were all visually appealing no objects in this collection held any relevance to the MOTAT Collection policy, so the entire collection was transferred to the National Transport and Toy Museum at Wanaka. (T408)
Photo courtesy of MOTAT.



a committee or trust). The board or governing entity should have final sign-off on decisions relating to deaccession, following expert advice when required, and proposals from staff.

Disposal, including transfer, is a separate and final step and follows formal deaccessioning. It is the process of physically removing an object from the museum's collections or premises.

There are many reasons to consider deaccessioning. However without proper research, these reasons are not in themselves enough to determine deaccessioning and disposal. Acceptable reasons for deaccessioning should be clearly set out in your collection management policy.

Your policy may include various criteria:

- Would deaccessioning the item improve the overall collection content?
- Would it decrease the administrative burden of too many objects or very large objects?
- Could it be substituted by a digital version or borrowed from another institution if needed?

Reasons that may contribute to a decision to deaccession include:

- Inadequate resources and space to adequately care for and store the current collection.
- Hazardous substances contained in objects or objects that are a threat to other collection objects, staff, and visitors. Object is in very poor condition.
- Object is incomplete and has no possible use.
- Severely deteriorated object that is deemed unable to be conserved by expert assessment.
- Items that have been unintentionally lost, stolen, or damaged, or accidentally destroyed.
- Object has been abandoned.
- Worn-out reproductions and objects destroyed through overuse.
- Item clearly belonging in another region.
- Object is a fake or forgery.
- Object is found to have false provenance.

- Object is a duplicate, or very similar to another object in the collection, and assessed as inferior.
- Meeting international and Te Tiriti obligations.
- Object is subject to a valid request for repatriation to a source community.
- Illegally acquired, needs to be returned to rightful owner through restitution or repatriation.
- Repatriation of ancestral human remains and their associated burial goods back to their source communities.
- Object has been acquired illegally or in contravention of international treaties or New Zealand laws.
- Clearly outside the collection scope and policy (time, area, and subject).
- Objects exceed the number of objects of that type needed in the collection for research, interpretation, and exhibition.
- Closely associated with another museum's collecting interests or area.
- Used or required for destructive analysis.



Hazardous items may be disposed of unless suitable storage and mitigation measures are possible. Picric acid and some other hazardous items can only be handled and disposed of by experts at NZDF. Photo: Jo Massey.

Kōiwi tangata human remains

Human remains may be identified during collection review and rationalisation projects. The holding of provenanced ancestral human remains, as well as their associated burial goods, against the will of source communities robs their descendants of dignity and closure. It is no longer considered ethical, and repatriation back to the community of origin should be the outcome wherever possible. Refer to the National Repatriation Policy. [National Repatriation Policy Museums Aotearoa 2021.pdf](#)

Museums should approach their local hau kāinga for assistance on all aspects of the repatriation process. Strong, robust partnerships between the museum and local tangata whenua are critical. At the same time, relationships with source communities need to be formed regardless of where the taonga or human remains originated from. Tangata whenua have a custodial role to play in the management and return of kōiwi tangata. Refer to [Collection management: Repatriation guide, Te Papa](#).

The repatriation of kōiwi tangata and taonga specifically relates to Article Two of Te Tiriti o Waitangi. This requires a formal deaccession process for both kōiwi and taonga. Refer to MA [Code of Ethics for guidance](#). Another resource is *Waitangi: Māori and Pākehā Perspectives on the Treaty of Waitangi* by I H Kāwharu.

Te Papa's position in repatriating kōiwi tangata is that they are not considered part of the museum's collection, rather they are the remains of ancestors to be treated appropriately at all times.¹³

'When considering deaccessioning a good question to ask is: can we clearly identify the public and organisational benefit of deaccessioning'

When not to deaccession

- You are doing it to fund operations.
- There is pressure from other museums, individuals, stakeholders, or the board, or another committee or funding authority.

- Board members or staff are interested in privately acquiring or owning the collection items.
- One person is making all the decisions.
- To avoid accountability to the public or to hide or fast-track the process.
- You face pressure from members of the public for the purchase or return of objects.
- When there is no acquisition, deaccession, or collection management policy.
- When there is no museum collection scope.
- When the advice of the museum's professional staff, experts, or community is ignored.
- You are following current fads or fashions.
- It's an ad hoc process without due diligence.
- There is no reliable documentation or research completed or recorded.



There is a strong presumption against deaccessioning so consideration needs to be thorough and well documented. Photo: Amanda Rogers.

Museum Code of Ethics (MA and ICOM) state there is a strong presumption against deaccessioning so consideration needs to be thorough and well documented. Deaccessioning need not be controversial if transparent and ethical practices are followed. (see risks below)

¹³ Museum of New Zealand Te Papa Tongarewa. Kōiwi tangata – Kōiwi Tangata Policy. 27 November 2021.

Some items can be easily identified for immediate deaccession

- Items damaged beyond the possibility of repair – seek advice from a conservator or technical expert.



Seek advice from a conservator or technical expert if you are unsure about the cost or need for repairs. Photo: Kate Whitley.

- Items that are immediately hazardous to other collection items, visitors, or staff, and where no mitigation is possible – refer to applicable health and safety legislation and regulations.
- When many low value, identical, or easily available duplicates are held, for example, bottles, crockery, newspapers, books, magazines, or brochures. Copies of printed materials may be readily available or held by other organisations, such as your public library or the National Library of New Zealand.

Making a decision

When you have reviewed your collections using the range of tools outlined above, you will be in a better position to compare objects with similar ones in the collection and in other collections. You may find that one object is clearly important to the collection while another similar item does not belong. Decisions always need to be made against your policies. Using one assessment criteria is not enough.

If no records or information about an object are found, and if subject specialists and source communities are unable to provide any further insights, and you are certain the item is not relevant to your collection, you may want to consider deaccessioning it.

From here, the process is to: update your records, summarize your findings, and write a deaccessioning proposal (see form in the Appendix).

What are the risks associated with deaccessioning?

There are risks associated with deaccessioning and disposal: if processes are not transparent and accountable, there can be long-term impacts on the museum's reputation in the community and implications for the wider museum sector. These include:

- Perception of lack of transparency.
- Community and stakeholders lose trust in the museum.
- Bad publicity.
- Negative effect on future donations.
- Legal action arising from ownership claims.
- Loss of collection integrity.
- Accusations of unethical practice.
- Conflicts of interest become apparent.
- Misuse of funds.

Keep in mind that codes of ethics for museums require that museum personnel including staff, your governing body, volunteers and their family members, relatives and close associates do not receive or acquire objects or financial benefit from deaccessioning. Be aware that conflicts of interest most often occur in disposal by sale.

Refer to ICOM CODE OF ETHICS FOR MUSEUMS Article 2.17. 1986

How can risk be minimised?

Risks can be mitigated by following policy, having clear ethical procedures in place, listening to experts, and carefully considering your methods of communication and disposal. Managing risk is also about managing public perceptions. It is important to be prepared and able to demonstrate that the museum has taken a responsible approach to deaccessioning and disposal.

Be transparent, have a strong communication strategy in place to manage perceptions, and delegate a single

point of contact at the museum. Prepare a press release and formal letters to interested or involved parties. Prepare transfer or sale agreements.

Managing negative publicity

One way to manage negative publicity is to find ways to keep objects to be deaccessioned in public ownership or public trust, whenever possible. See below for recommended methods of disposal. The level, approach, and timing of any communication will depend on the types of items being disposed of. When considering communication, be clear about its purpose. Is it to provide information, engage people in consultation, or seek views?

Nominate one point of contact at the museum. The whole workforce, including those not directly involved in the disposal process, should be informed about the process and potential disposals, the reasons behind any decisions, and any proposed courses of action. This will help to ensure informed communication with people outside the museum. Museums should also consider ways of communicating information to key stakeholders, such as Friends of the Museum, iwi advisory groups, and regular visitors. This could include briefings posted on museum websites and in newsletters.

Keep in mind that central to the museum's trusted role is the preservation of significant collections for future generations. Decisions should take into consideration any community requests for certain objects to stay in the area.

Avoid the perception that the museum is deaccessioning objects in exchange for objects of lesser importance.

Current fads or fashions should not drive deaccessioning (for example, furniture of a certain period is no longer considered interesting and so is deaccessioned).

Associated whānau, hapū, and iwi donors or their descendants, other museums, and collecting institutions need to be informed prior to items being deaccessioned or sold. Excluding any stakeholders or partners from the deaccession process may be unethical and lead to ill will, legal action, negative publicity, or damaged relationships.

Documentation

Keep all documentation concerning deaccessioning and be accountable:

- Decide who is responsible for records.
- Make a special file for deaccession recommendations and actions.
- Don't reuse accession numbers.
- Keep all files from dispersed objects.
- Keep hardcopy and computer files.
- Record objects as deaccessioned on their collection record in your CMS and all registers.
- Note method of disposal and recipient.

Take time to re-evaluate or reconsider any proposed deaccession (six months or more). If this is left too long, however, staff may change, other priorities take over, and the process will be stalled. Don't leave the responsibility to someone else.

How to avoid deaccession in the future

It's alright to say 'no thanks' to offers of donation when backed by policy. If your accession practices are controlled and align with collection policy criteria, you should be able to avoid the need to deaccession in the future.

Always be careful and in control of how accession occurs – have a clear collection policy and publicly communicate the museum's collecting scope. Decide who can make decisions about acquisitions. Don't be afraid to turn down offers of donations and use your institutional policy to back yourself. It helps to make group decisions about what will be accessioned and deaccessioned, so that the responsibility doesn't lie with any one person and your collection themes and priorities can be discussed. It works well to have a regular group meeting to discuss donation offers. Always ensure that donation offers are carefully documented with all details recorded. Use a standard receipt document such as an object receipt.

[Object receipt \(donor copy\) \(eDOCS 259790\) \(tepapa.govt.nz\)](https://www.doc.govt.nz/assets/Uploads/259790-Object-receipt-donor-copy.pdf)

Transfer or disposal of objects

When a decision has been made to deaccession, the next consideration is the transfer of the deaccessioned items. Once an object has been deaccessioned from the museum's collection, it is still the property of the museum until ownership has been legally transferred and the item leaves the custody of the museum.

Before transferring, exchanging, or conveying (donating) objects check:

1. You have sign-off from the decision-makers

The final decision to remove an item from the collection must be made by the museum's governing body, acting on the advice of relevant staff or, in small museums, volunteers or outside experts. Decisions to deaccession items must not be made by an individual member of staff or a volunteer acting alone. The final decision relating to the disposal of an item must also be approved by the governing body and documented.

In the case of taonga Māori being recommended for deaccession, the decision will be made in partnership with iwi Māori representatives. Associated hanau, hapū and iwi must consent, and donors or their

descendants, other museums, and collecting institutions need to be informed prior to items being disposed of by whatever means.

2. You have verified in writing:

- The object is legally owned by the museum and there is proof of title. Deaccessioning can only occur if an item has been accessioned.
- The objects proposed for deaccessioning have no conditions or restrictions attached that may prevent deaccessioning.
- If ownership is not clear due to poor records, undertake research on the item and a risk assessment of the consequences of the proposed removal.

If you decide to go ahead with deaccessioning and disposing of items after all research and documentation is completed and your proposal is signed off, there are recommended ways to dispose of items. It is always preferable to keep deaccessioned items in public ownership. However, this is not always possible. The following table shows the different avenues for disposal and consideration.

Transfer and disposal methods – least risk to higher risk

Public domain – remains in public ownership	Deaccessioned items should be offered to other museums and public organisations before any consideration of disposal outside of the public domain. Items of least deaccession risk are mass-produced items or abundant natural items, such as easily identified geological specimens. Ensure associated whānau, hapū, and iwi consent, and that donors or their descendants (if any), and other museums and collecting institutions are informed prior to items being potentially deaccessioned by whatever means. Make contact through the Museums Aotearoa website, newsletters or papers, and letters to marae offices or mandated iwi authorities.
If an item can be readily used and colleagues agree, transfer internally to education or study collections	If the level of care changes because of a new use in the museum, formal deaccession from the collection is still needed. The item is not just being relocated. Note in records that the item as 'internally transferred' to an education or study collection or other area of the museum. Document the transaction and give the item a new number series, for example, 'EC' for 'education collection'. Be aware this method may mean gradual destruction of the item.

Gift, donate, or transfer to another public or non-profit museum	Deaccessioned items should be offered to other museums and public organisations before any consideration of sale. Contact museums who might be interested. Advertise widely within the GLAM sector. Identify a suitable public museum that has acceptable museum standards and is able to adequately care for objects and provide access. This method is the most likely to ensure that items remain cared for and accessible to the public. File copies of all documentation and receipts.
Return or restitution to current rightful private owner, iwi, or the country of origin	For detailed information refer to National Services Te Paerangi's Repatriation Guide
Exchange for another item with another public museum, or cultural or educational institution	Ensure exchange value is fair. Independent appraisal may be needed. Ensure all associated documentation and research is also exchanged and all records completed.
Sale to another public or not-for-profit museum	It is recommended that the museum and purchasers obtain their own independent appraisal or valuation. However, a museum may decide to sell at below the market value to ensure acquisition by another museum. <i>Be aware that conflicts of interest most often occur in disposal by sale.</i> A funding agency may be entitled to request a repayment if an item has been sponsored, for example, if public funding has been used for conservation of an item now being sold.
Out of public domain	Deaccessioned items should be offered as gifts to other not-for-profit organisations or charities before any sale is considered. In cases where a museum decides to sell a deaccessioned item, the method of sale should be a transparent one. In most cases this will be by public auction or a similar type of publicly accountable sale.
Return to donor or source	Items originally given without restriction are the museum's property. However, consider returning items to original donors, especially if it appears impossible to keep them in the public domain. <i>See below for a detailed explanation of considerations.</i> It is recommended that return to an original donor is only considered once the item has been offered to other museums, unless there are extenuating circumstances, such as conditions laid down on donation; an item having a particular personal significance to the donor and a low heritage value; or a strong likelihood that the item will be transferred out of the local area or sold.

Public auction	This ensures that there is openness and transparency. Consideration should be given to the timing of the sale, keeping in mind its notification, its location, and the choice of auctioneer. The sale catalogue should indicate the item has been deaccessioned after due diligence.
Auction or sale online	Choose a reputable online auction method with adequate security
Public sale	Appraisal by an independent expert is needed for items of possible high value. Be aware that conflicts of interest most often occur in disposal by sale. Associated whānau, hapū and iwi, and donors or their descendants, and other museums and collecting institutions need to be informed prior to items being sold by whatever means. Sale of deaccessioned items through the museum shop or their use as props is not recommended.
Private sale	Appraisal, transparency, and openness are required. Items of high value carry the most risk for deaccessioning, particularly unique artworks.
Recycling	If a suitable new location cannot be found and other methods are not appropriate, a museum may consider recycling an item through sale as scrap or as a gift to a community charity. Public sales such as jumble sales may lead to the identification of items by donors, especially in smaller communities, and may affect the museum's reputation and future donations and support.
Destruction	If none of the above options is possible, it may be proposed to destroy or abandon the object. The justification and documentation for this type of deaccession must include the steps taken to determine that the object has no value. Document the method used, have it witnessed by another person in your organization, and photograph the disposal or destruction for records.

Recently, museum ethical committees have reaffirmed that the proceeds from deaccessioning should be used solely to fund the direct care of collections, or for collection acquisitions, and not be used for general operational funds.¹⁴

Return-to-donor option – special considerations

Return-to-donor has often been the first choice of museums, however, this option does have risk. Notifying donors of deaccessioning may imply that a donor has control or retains a legal interest in an item. This is not the case if the donation was properly

documented. A documented donation or gift means that there has been a complete transfer of ownership, so the museum can make decisions about deaccession and disposal. Be sure to explain this to every donor, and if necessary, draw attention to this in your policy.

Notifying donors and returning items to them may weaken the museum's credibility with donors and the public. However, the museum may choose to advise the original donor, their family, or descendants of an item recommended for deaccession and its eventual relocation as a gesture of goodwill.¹⁵

¹⁴ <https://nonprofitquarterly.org/museums-and-their-observers-debate-the-fields-deaccessioning-ethics/> 2018.

¹⁵ Malaro M C. 1998, p228.

Museums may consider returning items to donors, especially if it appears impossible to keep them in the public domain (see table above). Items cannot be returned to relatives of the donor without risk unless there is a valid will or other document that clearly shows their ownership of the item. If items are to be returned to the descendants of donors, careful consideration must be given as this may lead to disagreement within families and negative publicity. Some items are donated to museums in the first instance to prevent disagreement about where an object should be placed.

Other considerations are the length of time since the donation was made and the likelihood of the donor's details being accurate and up-to-date. It may be useful to set a specific time period in your policy when involving donors – for example, if the item was donated in the past 10 years, attempts will be made to contact the donor. It may also be useful to ask for a next-of-kin contact when donations are made.

All requests for returns must be directed to the board or committee and dealt with, in writing, and the correspondence retained and attached to the object's accession record. *If legal action is threatened consider all risks and seek legal advice or contact Museums Aotearoa or Te Papa Tongarewa, National Services Te Paerangi.*

If none of the above options for transfer or disposal is feasible, consider retaining the item in the collection.

Final steps in transfer and disposal

Finally, arrange transport and documentation for items being transferred from the museum. Record the new owner and final location. Ensure documented transfer of legal title to any recipient and any appropriate transfer of intellectual property or copyright. Be aware that ownership and intellectual property rights where taonga Māori are concerned require additional steps.

Use a form that includes the following:

- A brief summary of the deaccession
- Detailed rationale for deaccessioning
- Acquisition, deaccession, and disposal methods
- A detailed list of objects in the deaccession with photographs, opinions, and advice considered

- A list of attachments to the form
- Cultural considerations
- Proposed method of disposal
- Any conditions attached
- Risk assessment
- Note of new location
- Documentation of transfer of title
- Your recommendation and signature
- The collections advisory committee's recommendation, if appropriate
- The governing body or committee chair's approval and signature
- Reference to minutes of relevant board or governance committee meetings

Follow up

- Amend museum's plans, policies, and processes as necessary.

Debrief with stakeholders and evaluate the methods and implementation of the collections rationalisation.



Collection rationalisation at Waikaia Museum. Jo Massey, Roving Museum Officer, Southland, works with museum volunteers to review collections and upgrade storage. Photo courtesy of Waikaia Museum.

Summary

Collection rationalisation involves thoroughly understanding collections through a process of inventory and in-depth research. Taking care of this responsibility will help your museum to proceed with managed and sustainable collecting practices and simplify future audits of the collections. Collection rationalisation may include the consideration of carefully managed, transparent deaccessioning, and the possible transfer and disposal of items by ethical methods.

Discovering and sharing new and meaningful information about objects can help give security, respect, and value to collections, and contribute to a better understanding of connections and interlinking histories.

Disclaimer

The guidance provided is Te Papa Tongarewa's view of good museum practice. Our guidance is neither exhaustive or exclusive. Where our guidance provides reference to other guidance, including websites, as a convenience for the reader, this does not mean that we endorse the contents of that guidance.



Frequently asked questions

How do I give due consideration to Te Tiriti o Waitangi principles: protection, partnership, and participation?

The relationship established by Te Tiriti o Waitangi and the principles of tino rangatiratanga apply to many aspects of museum and art gallery work. This requires museums and art galleries to understand and incorporate the values of tangata whenua into their museum practice. The relationship means that the full authority for collections does not rest within the institution at all times, and that it is crucial to maintain regular, respectful, and mutually-beneficial contact with appropriate iwi, whānau, hapū, and other source communities, as well as interested groups who value their connections to the works and activities of the museum or gallery.

For details see Museums Aotearoa Code of Ethics, 2021, Draft.

How should I deal with items in the museum that I cannot be sure are part of the collection?

Found in collections (FIC)

These objects remain a mystery after all attempts to reconcile them to existing records, loan files, and external research fail. Keep a clear location record of where they are found because their association with other objects may be important. If further research doesn't clarify their identity, decide if you want to accession them into the collection using the usual collection policy scope, criteria, and assessment methods. If they fit your collection, label and record with a temporary number in case an earlier record or number is found later. An additional number system for FIC objects should be distinct from other number systems. If the object is later found to have been accessioned, the original accession number should then be used, and its temporary number retained in the updated object record or database.

Examples of number systems: three-part number

system – 2017-999-01; alphabetical prefix system – FIC-2017-01.¹⁶

Large groups of unidentified or tagged items: group or bulk accessions

An object may be part of a large group of items where individual items have not been fully processed, accessioned, or catalogued. Items from a bulk accession may become detached from their wider accession group and dissociated from any records. Avoid this by collating, storing, and labelling bulk accessions and their containers very carefully. Check the original entry documentation to see if there are clues about contents and subject matter before proceeding to assess these against your collection policy and reviewing criteria. Do not accession any items that don't fit your collection criteria. Use the usual methods for transfer or disposal, or return-to-donor if this was documented when receiving the items.

Unaccessioned, unregistered, and unlabelled items, damaged or of very low quality

When it is clear why they are not accessioned, determine if the items have any place in the collection, and if none, photograph, record, and offer for relocation or destroy. Record how you came to the decision and the steps you took.

Abandoned property

Check if you can infer if the intent was to abandon the item. Seek legal advice if the items are of high monetary or assessed heritage value. Intent can sometimes be inferred for 'doorstep' or unsolicited donations. Origins can be a concern if there is a risk the items may be stolen property. Keep a clear record of how and when the item was received. Items of obvious commercial value that have been abandoned, and you are uncertain about their origin or intent, should be handed into the police. Police will contact the museum to collect the item if it is not claimed

¹⁶ Buck, Rebecca. 'Found in Collections.' MRM5: Museum Registration Methods 5th Edition. The AAM Press. 2010, p109–118.

after a set period. You can then proceed with the usual processes to accession or disposal.

Uncollected authentication and appraisal items

Items may be brought in to the museum for examination and never collected. Attempt to contact the owner, and if unable to make contact, consider publicly advertising for the owner to come forward and reclaim the item. If this fails, proceed as for abandoned property. Ensure you can demonstrate due diligence.

Uncollected items

Items brought in on loan or for consideration for donation and not collected despite contact being made – research files and advertise for information. Proceed as for abandoned property. Avoid accruing loans by only borrowing short-term for specific purposes, such as research or exhibition. Do not store loan items in collection storerooms, and do not record them in the collection database. Keep a separate loans file and document all loans.

Unsolicited or anonymously left donations

Proceed as above for abandoned property.

Items that have no records that may be staff or visitor property

If left unclaimed too long these can easily be mistaken for collection items. Contact current and previous staff, and if this doesn't have a result, proceed as above for abandoned property.

Collection items identified to be moved from collections to internal education or hands-on activities

Check for any restrictions. These items need to be deaccessioned first and marked as such.

Exhibition properties

Reproductions, lending collections, study collections – these can be confused with FIC when not located, stored, and labelled separately. Check with colleagues and clearly label all items.

Taonga tūturu

Items brought in for registration under the Protected Objects Act 1975 – Ministry for Culture not notified, not documented, or not given location record.

Unaccessioned items or method of entry unknown

Follow the same process as for FIC above. Research the history of an item as far as possible, and document what research was done.

Most of these situations can be avoided by having clear entry documentation, with contact and provenance details always recorded, and an option for deaccession, transfer, or disposal if the museum decides not to retain the object after it has been assessed. Maintaining controlled and limited access to storage areas is also helpful.

Further resources, help, and support

[Canadian Museum Association checklist](#)

[Simple flowchart of deaccessioning process](#)

[Deaccession form](#)

Other published methodologies for assessing significance

[The University College London Collections Review Toolkit](#) provides guidance for reviewing the significance, care, and use of collections and tools, and exercises to guide museums in developing their own programmes of review.

Collections Trust UK's [Reviewing Significance 3.0](#) provides analytical tools to aid museums, archives and libraries of all sizes through the processes of Collections Reviews and Significance Assessments

[Why do we have it? A significance process and template](#) created by CYMAL which focuses on the significance of collections and provides a template and recording grid to download.

[Rationalisation scoring grid](#)

Relevant codes, legislation, and guidelines

Auckland Museum [Deaccessioning and Disposal policy](#)

Museums Association (UK) [Disposal Toolkit Guidelines for Museums](#)

ICOM [Checklist on Ethics of Cultural Property Ownership](#) (2011)

Canadian Museums Association [Ethical Guidelines](#)

ICOM [Code of Ethics for Museums 1986](#)

ICOM [Guidelines on Deaccessioning of the International Council of Museums 2019](#)

Museums Aotearoa [Codes of Ethics 2021](#)

Museums Aotearoa [National Repatriation Policy 2021 and Associated Burial Taonga within New Zealand](#)

[Standards on Accessioning of the International Council of Museums \(ETHCOM, 2020\)](#)

[Standards on Fundraising of the International Council of Museums \(ETHCOM, 2020\)](#)

[The Convention on International Trade in Endangered Species \(CITES\)](#) Department of Conservation

UNESCO [Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property 1970](#)

UNIDROIT [Convention on the International Return of Stolen or Illegally Exported Cultural Objects](#)

UN [Declaration on the Rights of Indigenous Peoples Arms Amendment Act 2019](#)

[Conservation Act 1987](#)

[Health and Safety at Work Act 2015](#)

[Marine Mammals Protection Act 1978](#)

[Protected Objects Act 1975 and Amendment 2006](#)
Ministry of Culture and Heritage

[Public Records Act 2005](#)

[Wildlife Act 1953](#)

Further reading, tools, and websites

[Deaccessioning Guidelines checklist](#) (Canadian Museums Association)

[National Park Service Museum Handbook](#) (National Park Service USA)

[Collections Rationalisation: Planning for Action](#) (SHARE Museums East)

Spectrum Standard: [Deaccessioning and disposal](#) (Collections Trust)

Spectrum Standard: [Inventory](#) (Collections Trust)

Spectrum Standard: [Documentation Planning](#) (Collections Trust)

[Provenance research](#) (Te Papa)

[Managing collections](#) (Te Papa)

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