



North Carolina Museum Of Natural Sciences

POLICY

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Research Collections Policy

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Museum Research Collections Policy

The following policy outlines protocols, procedures, and guidelines related to the natural sciences Research Collections, maintained by the Research & Collections section of the NC Museum of Natural Sciences (NCMNS).

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I. ORGANIZATIONAL CONTEXT FOR RESEARCH COLLECTIONS

- The NCMNS is a science museum with specimen collections and scientific research forming the intellectual bases of the organization. An organizational section of the NCMNS, the Research & Collections section (R&C), is specifically devoted to maintaining and growing the Research Collections and to conducting rigorous scientific research (see separate NCMNS Policy on Research).
 - The R&C section is led by a PhD level scientist who serves both as Chief of the Research & Collections section and as Deputy Director of the NCMNS. The Chief of the Research & Collections section must have extensive experience in the best practices related to the care and maintenance of natural sciences specimen collections and the administration/supervision of curatorial staff.
- In accordance with its overall Mission Statement, the NCMNS studies and facilitates the study of the natural history of North Carolina, the Eastern United States, and other geographic areas. To accomplish this mission, the NCMNS must acquire, retain, and manage natural sciences specimens (collections), preserve these materials for future generations, and encourage appropriate collections-based research.
 - The NCMNS Research Collections Policy was developed by the NCMNS Research & Collections curatorial staff to reflect the best practices as set forth by the American Association of Museums (AAM, 2008). This policy will be freely available and accessible on the Research & Collections page of the NCMNS website (<http://naturalsciences.org/research-collections>).



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II. DEFINITIONS

Research and Collections (hereafter, R&C) is one of the NCMNS sections. The Chief of R&C oversees the R&C staff, comprising Scientists, Curators, Collections Managers, and support staff whose responsibility is the maintenance of, and research on, the NCMNS Research Collections (defined below). The R&C section is divided into several Units including, but not necessarily limited to: Geology, Paleontology, Mammalogy, Ornithology, Ichthyology, Herpetology, and Invertebrates.

NCMNS Management Team is a committee minimally comprising the Museum Director, Deputy Museum Director(s), and Chiefs of all NCMNS sections.

NCMNS Research Collections: natural sciences specimens and related materials (documentation) acquired and preserved for scientific, historical, cultural, and/or educational value. Specimens and related materials include (but are not necessarily limited to) preserved organisms (including preserved or frozen tissues for genetic research), replicas, artifacts, photographs, paintings, scientific illustrations, catalogs, field and lab notes, letters, maps, and exhibit materials. Libraries of reference and research-related documents are also maintained, as well as originals of scientific illustrations produced for, or by, NCMNS research staff, associates, and donors.

Teaching Collections and Living Animal Collections, maintained by several other NCMNS sections, contain a variety of live animals, replicas, and preserved materials used in interpretive and/or educational programs. The NCMNS R&C section does not maintain a Teaching Collection or Living Animal Collection, and therefore this NCMNS Research Collection Policy does not set forth policy for NCMNS Teaching Collections or Living Animal Collections.

Transaction records, defined as official, permanent documents relating to transfer of title, provenance (history), condition, accession, loan, or deaccession of an object represent formal documents of agreement. Bound catalogs and/or the NCMNS electronic databases provide a chronology for accessions and loans, and printed forms document and track all accessions, loans, and deaccessions. Also considered transaction records are the NCMNS electronic databases, correspondence, and specimen-associated documents (e.g., permits).

III. CARE AND CONTROL

NCMNS Research Collections: Curation, maintenance, and stewardship of the NCMNS Research Collections are the primary responsibilities of the R&C Curators and Collections Managers. The Chief of R&C is ultimately responsible for the NCMNS Research Collections, but he/she may delegate authority for the care of these collections to other personnel.



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Transaction records relating to the NCMNS Research Collections are maintained by the R&C staff.

Because professional standards and practices vary considerably among scientific disciplines represented in the NCMNS Research Collections, specific conditions and/or stipulations may be required by each R&C Unit. When discipline-specific issues arise, policies developed must be consistent with the intent of the general NCMNS Research Collections Policy.

IV. ACCESS AND USE

Preservation/stewardship and use are the objectives of collections management. "Use" includes reasonable access, scientific study (including form-altering and consumptive activities [e.g., anatomical dissection, chemical analysis, DNA extraction]), and exhibition. Because improper use can seriously compromise the integrity of a collection, access must be regulated.

Access to the NCMNS Research Collections is normally restricted to examination and study by the scientific community. In general:

- Unsupervised access to the NCMNS Research Collections is restricted to:
 - R&C Section: Curators, Collections Managers, Research Laboratory Heads and Assistant Heads, and support staff approved for access by Unit Curators
- Supervised access to the NCMNS Research Collections is available to users with legitimate scientific needs during established office hours (or by appointment pre-arranged with the relevant Unit Curator). Unit Curators establish procedures for access to the respective Unit collections.
- Requests for locality information are treated the same as requests for loans of specimens. When requests involve localities on federal (e.g., National Park Service, National Wildlife Refuges, etc.), state (e.g., State Parks, State Natural Areas, etc.), city, county, or private (e.g., The Nature Conservancy, trusts, etc.) lands, requesters will be referred to the appropriate authority for this information. If locality requests involve federally- or state-listed species (Endangered, Threatened, Special Concern, or "to be listed"), or exploited species, requesters will be referred to the appropriate authority. If the appropriate authority does not have the requested data but approves of the request, then that authority must authorize (in writing) the Museum to release the requested locality data to the requester.
- Unit Curators are responsible for all NCMNS Research Collections materials and approve their use for exhibit or public programs
 - Use of Research Collections materials in exhibits requires the development of guidelines for interpretive use; interpretive statements require review and approval by the Collections staff prior to installation.
 - When relevant, Chiefs of other NCMNS Sections are responsible for ascertaining that



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display environments containing objects from the NCMNS Research Collections conform to, and are maintained at, accepted NCMNS standards for conservation and security as stipulated by the Collections staff.

- Access to or use of any NCMNS Research Collections specimens and/or objects currently being used in exhibits or public programs **must be** approved by the relevant Unit Curator or the Chief of R&C.

Access to Rare and Valuable Specimens and/or Materials. Some specimens and/or associated materials have significant monetary, cultural, historical and/or scientific value, or are otherwise inherently unique (e.g., type specimens); access to such specimens is limited and is at the discretion of the relevant Unit Curator and/or the Chief of R&C. If access to such specimens and/or materials is approved, then proof of security commensurate with their value should be provided by the borrower.

Acceptable Use of NCMNS Research Collections and Data. Use of NCMNS specimens and associated materials should follow standard practices for relevant scientific disciplines. Appropriate use may sometimes require irreversible alteration or consumptive destruction (e.g., anatomical dissection, DNA extraction, chemical analysis of feathers, fur, or small mineral sections); such use **must be specified by the borrower and detailed in the loan agreement** prepared by the relevant NCMNS Unit Curators. Unit Curators will consider the impact of the proposed uses and grant approval for such proposed uses on a case-by-case basis. When no Unit Curator is available, the Chief of R&C must give final approval for alteration or consumption of NCMNS specimens and/or materials. In general:

- When approved, anatomical dissections must follow standard practices, including acceptable preservation of dissected structures in association with the larger specimen; it is the responsibility of the relevant curatorial staff to stipulate such standard practices in the loan agreement and the responsibility of the borrower to follow these stipulations.
- When approved, petrographic and histological thin sections must follow standard practices. It is the responsibility of the relevant curatorial staff to stipulate such standard practices in the loan agreement and the responsibility of the borrower to follow these stipulations.
- When approved, DNA extractions should be conducted to be minimally destructive to preserved tissues (i.e., many effective DNA extraction protocols do not require tissue homogenization).

Access to and use of NCMNS Research Collections and associated data is typically free of charge for non-profit users. Requests from for-profit users may be subject to fees as determined by the Chief of R&C and/or the Museum Director.

Access to Transaction Records is restricted to the curatorial staff and the NCMNS Registrar. Outside inquiries regarding accession and disposition records will be routed to the Chief of R&C or to the Museum Director for review before being forwarded to the NCMNS Registrar.



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V. ACQUISITION POLICY

Collections growth and development priorities are integral components of the NCMNS's long-range planning. It is the policy of NCMNS to rely upon the judgment of the curatorial staff concerning scientific relevance and utility of material in their collections, and of objects proposed for acquisition or disposition. The curatorial staff of each Unit develops priorities for the growth and development of the NCMNS Research Collections.

Specimens acquired for NCMNS uses other than accession into the NCMNS Research Collections should be examined by relevant NCMNS scientists to ensure that materials of scientific value are safe for public use and are not subject to inappropriate use. NCMNS scientists will ensure that rejected scientific materials possibly of use to other NCMNS Sections are made available to those sections prior to disposal.

Specimens may be obtained by field collection, donation, transfer, permanent loan, or purchase. Research materials are accepted on authority of the relevant Unit curatorial staff.

Acceptance of specimens requires approval and documentation. Objects may be accepted for the collections once it has been determined that:

- The objects fit priorities developed by the appropriate collections representatives.
- NCMNS can reasonably provide for appropriate processing, storage, protection, and preservation of the materials.
- The materials were obtained in conformity with all applicable international, national, state, and local laws and regulations.
- In most cases, NCMNS will acquire legal title to the material(s) without restriction. Materials occasionally may be received, however, from agencies prohibited from relinquishing legal title (e.g., National Parks, USFWS) or with restrictions or limitations; acquisition of such material must be approved by the Museum Director and, if necessary, an Acquisitions Committee (see below). Conditions under which such a transfer is made must be clearly stated in the instrument of conveyance. Unit representatives should discuss proposed acquisitions with the Chief of R&C if:
 - Processing or housing the material will significantly affect NCMNS operations,
 - Purchasing from, or exchanging with, a private collector is involved,
 - Transferring ownership of the material creates a question of legality or propriety, or



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- Replacing the material, either as a single item or in the aggregate, will cost more than \$10,000, or if any single item in the acquisition has a market value greater than \$1,000 (as appraised by external evaluators).

Acquisitions Committee. At times an Acquisitions Committee may be required to review a proposed donation for appropriateness. The Acquisitions Committee will be minimally composed of the Museum Director, the Deputy Museum Director(s), the Registrar or his/her substitute, the Chief of R&C, and the relevant Unit Curator who will bear ultimate authority for the proposed acquisition. This committee will decide acceptance or rejection of questionable material.

Documentation. Legal instruments of conveyance will be filed with the Transaction Records. Documentation must include adequate descriptions of all objects and the conditions of transfer; each document must be signed by the donor and an authorized museum representative. An example of an appropriate acceptance letter involving more than one section follows:

Dear _____,

Thank you for your donation of _____; generous donations like yours keep our museum thriving. Enclosed are two accession forms detailing those specimens from your donation that have been accessioned into our (research, teaching, etc.) collections. Please read, sign, and return one copy of each form. Please keep one copy for your records.

The bulk of the material you donated has been transferred to (section or outside agency name). (He/she/they) will be sending you a letter detailing the material received. We chose to pass this material on to (him/her/it) as it will (go directly into kits for curriculum support, and will be distributed to schools throughout the state of North Carolina this fall, or whatever).

Should you have any questions please feel free to contact me. Thank you again for your generous donation.

Sincerely yours,

(Accepting personnel)
(Section's name)
(919) 733-7450 ext ---
(e-mail address)

Accession documentation should be processed within a reasonable timeframe after the objects are accepted for transfer to NCMNS. The accession process consists of entering relevant acquisition information electronically into the NCMNS accessions database. Completed documents are to be made available to the Chief of R&C and to the NCMNS Registrar.



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Each Unit will maintain a file of accession documents so that donations can be located by accession number or donor's name (the NCMNS databases will also accomplish these functions simultaneously).

VI. LOANS

Incoming Loans to the R&C section are accepted only for purposes of research, exhibition, or education. Permanent R&C staff are authorized to borrow materials necessary for research purposes. Relevant Unit Curators, or the Chief of R&C, must authorize (in writing) the use of NCMNS facilities by non-permanent staff who may need to borrow materials through NCMNS. NCMNS will accept on loan only materials that:

- were acquired or collected in conformity with all applicable international, national, state, and local laws and regulations, and
- were collected in a manner that does not cause significant damage to, or destruction of, natural habitat, biotic populations, significant geological, historical, or cultural sites, or human burial places.

NCMNS R&C staff may accept an object of uncertain history on loan only with approval of the Museum Director and/or Deputy Museum Director. No indefinite or long-term loans will be accepted unless authorized by the relevant Unit Curator. Materials not claimed by the lender will convert to NCMNS after seven (7) years if NCMNS has given sufficient notice to the lender, and if the lender has not made an action to reclaim the loan within those seven years.

Objects loaned to NCMNS R&C with an understanding that they will be donated to the collections must be accompanied by written declaration to this effect. Should the lender decide not to act in accordance with this declaration, the cost of insurance, curation, and storage during the retention period must be borne by the lender.

Incoming Loans must be accompanied by a written agreement between the lender and the NCMNS R&C staff member requesting the loan. The lending institution must notify NCMNS, in writing, of all terms and conditions governing a loan (including specific storage conditions required for loaned specimens).

NCMNS R&C will not clean, repair, restore, or alter in any way objects it has received on loan without the express written approval of the lending institution.

Copies or original material will not be reproduced without written permission from the legal owner.



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Research Loans will not be insured from loss unless the lender/borrower specifically requests such coverage. R&C staff members negotiating loans are responsible for packing/unpacking, preparing condition reports, and shipping all loans for the R&C Section.

Objects may be left in temporary custody of R&C staff for identification, study, examination as a public service, or as a possible gift, purchase, or loan. The NCMNS R&C will accept only objects for temporary deposit that:

- were acquired or collected ethically and legally, in conformity with all applicable international, national, state, and local laws and regulations, and;
- were not collected in a manner that would cause significant damage to, or destruction of, habitat, biotic populations, significant geological, historical, or cultural sites, or to human burial places.

NCMNS R&C may accept on deposit an object of uncertain history only with approval from the Museum Director. A document describing terms of agreement and duration of custody must be issued for all objects left in custody of NCMNS R&C; documents must be signed by an NCMNS R&C representative and by the individual leaving the object. In cases of uncertain history the Museum Director's signature is required.

NCMNS R&C will not insure objects left in temporary custody.

NCMNS R&C will not transfer possession, clean, repair, restore, or alter in any way objects left in temporary custody without express written approval from the depositor.

NCMNS R&C will not reproduce materials left in temporary custody without written permission from the legal owner of the materials.

Outgoing Loans of materials for scholarly research, exhibition, and/or education are subject to the policies and practices established within each Unit. All loans require written agreement between borrower and NCMNS.

It is the responsibility of the NCMNS Curatorial staff member authorizing the loan to:

- 1). Consult with all relevant Museum research staff to determine the availability of the requested specimens
- 2). Notify the borrower of the loan's terms and conditions
- 3). Record the transaction under procedures established by the respective Units

In general:



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- Loans preferentially are made to qualified institutions. Loans are made to individuals only under special circumstances, and only with prior approval from the relevant Unit Curator. Before lending to an individual, NCMNS representatives and potential borrowers must make every effort to seek institutional affiliation or endorsement. When affiliation is not possible to establish, then a written explanation for deviation from policy must be included with the loan documentation.
- Loans requested by students require faculty signature or other institutional endorsement.
- Non-permanent loans will be for a specified period of time, typically not to exceed one year. Loan periods may be extended only with approval from the Unit Curator who granted permission for the original loan or the Chief of R&C.
- Due to the destructive methodology involved with use of DNA-preserved tissues and DNA extractions, requests for these kinds of specimens are considered as permanent transfers from the Museum to the borrower. Borrowers may not transfer possession of these materials to a third party without prior written approval from the relevant Unit Curator. NCMNS requests that, although considered a permanent transfer, unused portions of tissues and/or DNA extractions be returned to NCMNS as a courtesy.
- Loans for in-house use (i.e., loans to any NCMNS staff member in any Museum Section) must be approved and documented as any other loan.
- Borrowers will not transfer possession, clean, repair, restore, or alter in any way NCMNS loan materials without prior written approval.
- NCMNS material will not be reproduced without written permission from the relevant Unit Curator, the Chief of R&C, the Deputy Museum Director(s), or the Museum Director.
- If necessary, the loan agreement will include details regarding physical conditions for the appropriate storage of specimens and/or objects, as stipulated by each Unit. It is the responsibility of the borrower to adhere to these stipulations.
- The cooperation of NCMNS should be acknowledged in any publication resulting from loaned materials. The NCMNS number (including NCMNS acronym) must accompany material used in publications and sequences deposited into public databases. The borrower should provide to the relevant Unit Curator a copy of resulting publications and a list of any public database identifiers (i.e., GenBank sequence accession number, etc.) based on loaned material.

Overdue loans are specimens and materials not returned to the NCMNS within the time period stipulated in the original loan agreement or any subsequent amendments to that loan agreement. The NCMNS will periodically send letters to the borrower requesting the return of overdue loans until the specimens and materials of the loan are returned.

- Loans that are overdue by five (5) or more years and for which the Unit Curator has given sufficient notice to the borrower, but the borrower has not made an action to return the loan or to justify the need for a loan extension, are referred to the Chief of R&C for further action (which may include a formal letter of inquiry/complaint to the administration of the borrower's



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institution; if this action ultimately does not effect a return of the loan, the matter may be referred to the legal counsel of NCMNS's parent department of state for possible further action).

VII. DEACCESSIONS

Deaccessioning will be undertaken for the sole purpose of advancing the quality and preservation of the collections. Generally, objects should be retained as long as physical integrity, authenticity, and/or usefulness to the museum remains intact. However, deaccessioning is indicated when:

- the object is no longer appropriate for the intent and purpose of the Museum;
- an absence of documentation, or inadequate documentation, critically reduces the utility of the object;
- the object fails to retain its identity, authenticity, or integrity;
- preservation of the object is no longer practical;
- the object's utility in the foreseeable future is dubious; or
- the object has been documented as missing for at least 3 years or is known to have been stolen

Deaccessioning includes four basic activities: determination of status, approval, documentation, and disposition.

NCMNS materials fall into two general status categories: **exempt** (not catalogued) and **non-exempt** (catalogued). **Exempt** materials are those materials not catalogued into the NCMNS Research Collections; these materials require less scrutiny prior to deaccessioning. **Non-exempt** materials are well-documented materials accessioned and catalogued into the NCMNS Research Collections; deaccession of non-exempt materials requires considerable scrutiny.

Prior to deaccession of any object, NCMNS representatives must ascertain that NCMNS holds legal title to that object. **Approval** for disposition, exchange, or transfer of exempt objects may be granted by the Unit Curator.

In the event that the Curatorial staff has determined that deaccession is appropriate for a non-exempt/catalogued object, they will submit a proposal to the Chief of R&C who will be responsible for approval/disapproval of the proposal. If the material as a single item has a value greater than \$1000, or in the aggregate has a replacement value greater than \$10,000, the Curatorial staff, Chief of R&C, and Museum Director will collectively decide whether the proposed deaccession warrants referral to a Deaccessions Review Committee.

Deaccession Review Committee members will vary to accommodate differing requirements of the varying disciplines and collections represented in the NCMNS, but will be minimally composed of



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the Museum Director, the Chief of R&C, the NCMNS staff member proposing the deaccession, and two additional knowledgeable NCMNS staff or associates to be selected by the Chief of R&C. This committee will utilize recommendations from the NCMNS staff member proposing the deaccession as the basis for making its decision. Final approval for deaccession of non-exempt/catalogued objects must be granted by the Chief of R&C in writing.

Documentation of conditions and circumstances under which objects are deaccessioned and disposed of will be retained as part of the Transaction Records. Recording deaccession of non-exempt material in the appropriate NCMNS catalogue/database will be required for each Unit collection.

Disposition of objects in the NCMNS Research Collection must be accomplished in a manner considered in the best interest of the NCMNS, the public it serves, the public trust it represents, and the scholarly or cultural community of which it forms a part. Preference will be given to using the object in NCMNS interpretive programs. If the object is not appropriate for internal use, consideration will be given to placing the object, through transfer, exchange, or sale, with another not-for-profit institution.

Neither non-exempt nor exempt objects from the NCMNS Research Collection will be given, exchanged, or sold to NCMNS employees, or to members of the governing authority of NCMNS or its representatives.

Sale at public auction, if consistent with state policy and NCMNS ethics guidelines, may be considered. Sale should be considered after all other options have been explored, and undertaken only under the following conditions:

- The Museum should neither create nor contribute to creating a market for natural history specimens;
- All sales must take place at an advertised public auction or in the public market place. No sales of deaccessioned materials will be made through the NCMNS support group (the Friends) or through the NCMNS Stores;
- Any proceeds from the sale of deaccessioned objects may be used only for collection acquisitions or direct care of the collections (or both);

Alternatively, a deaccessioned object may be discarded or destroyed. Physical disposal or destruction must be witnessed, and witness names and the date and manner of disposal must be recorded in the Transaction Records.

VIII. ETHICAL STANDARDS



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NCMNS subscribes to the ethical guidelines of the American Association of Museums (AAM), the North Carolina Museums Council, and those of other associations pertinent to the disciplines represented in the NCMNS.

Staff members are to act legally and ethically in collecting, acquiring, lending, borrowing, transporting, disposing of, and caring for specimens.

Staff is discouraged from forming or expanding personal collections in areas within the realm of NCMNS collections. In the case of potential conflict, a staff member may be asked to demonstrate that the possibility of competition with NCMNS does not exist.

Staff is prohibited from providing monetary appraisals.

Transfer of ownership, whether or not for payment, of any NCMNS Research Collections materials to a NCMNS staff member is prohibited.

Objects removed from nature by participants on NCMNS-sponsored research or interpretive field trips will not be retained in private collections unless justified and approved by a Section Chief before collection occurs.

IX. REVISIONS TO THE POLICY

This document will be reviewed every 5 years to ensure conformance with prevailing standards of the NCMNS Management Team and any other relevant bodies (e.g., AAM). All revisions will be approved by the NCMNS Management Team.

X. REFERENCES

American Association of Museums. 2008. National standards and best practices. American Association of Museums, Washington, DC. 92 pp.



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