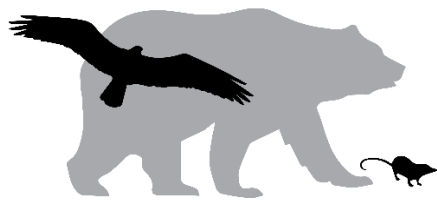


Philip L. Wright Zoological Museum University of Montana

Collections Management Policy



PHILIP L. WRIGHT
**ZOOLOGICAL
MUSEUM**

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1. Mission Statement

The Philip L. Wright Zoological Museum (UMZM), a unit of the Division of Biological Sciences of the University of Montana, is committed to the collection and preservation of zoological specimens for the purposes of research, education, and community outreach. The UMZM works for both current and future generations, sustaining these irreplaceable resources representing our natural heritage in Montana and beyond.

2. Scope of Collections

The UMZM maintains research and teaching collections in the general field of zoology.

- **Biological Scope:** Primary research collections include Birds, Mammals, Parasites (ecto- and endoparasites), and Eggs & Nests.
- **Geographical Scope:** While representing natural heritage "in Montana and beyond," specific focus is given to the fauna of the Intermountain West, Northern Rocky Mountains, and Northwestern Great Plains.
- **Legacy/Surrendered Collections:** Certain groups, such as Insects (transferred to MTEC), Fishes (transferred to College of Idaho), and Herps (transferred to California Academy of Sciences), are no longer actively maintained by UMZM.

3. Governance

The UMZM is a unit of the Broader Impacts Group within the Office of Research and Creative Scholarship at the University of Montana. Formerly a unit of the Division of Biological Sciences (DBS), the UMZM maintains a strong partnership with DBS as all UMZM physical spaces are located in facilities managed by DBS.

- **Faculty Director:** Responsible for university-level administrative decisions including funding and use of space. The Faculty Director is appointed by the DBS.
- **Curator:** Responsible for final approval of specimen records, authorizing access, maintaining facilities, and determining the disposition of specimens.
- **Museum Personnel/Staff:** Responsible for the day-to-day care of collections including preparation, databasing, and maintaining integrated pest management (IPM) protocols.
- **Administrative Oversight:** Access changes and master key issues are managed through the DBS front office.

4. Collection Categories

- **Permanent (Research) Collections:** Specimens with full data used for long-term preservation and scientific study. These are documented in the [Arctos](#) database.
- **Teaching Collections:** Specimens maintained specifically for education, Mammalogy and Ornithology labs, and outreach events. These may have low or no data and are not intended for permanent research preservation, though some may be transferred to research status if data is found.
- **Analytic/Tissue Samples:** Tissue samples are stored in -80°C freezers for molecular research and are cross-referenced to voucher specimens.

5. Regulations and Legal Guidelines

- **Laws Concerning Acquisition:** All accessions must fall under valid salvage permits or be collected by permitted and IACUC-approved methods. UMZM complies with Montana Fish, Wildlife, and Parks (MTFWP) and US Fish & Wildlife Service (USFWS) regulations.
- **Access Policy:** Codes and GrizCard activation for museum spaces (HS 212, HS 201, ISB 404A) are granted only after training and based on need.

6. Acquisitions and Accessions

- **Acquisition Authority:** The Curator oversees the acceptance of new materials.
- **Documentation:** New accessions (2017 & on) are summarized in a master electronic list and assigned a sequential number (UMZM-YYYY-##).
- **Conditions of Acceptance:** Donors must complete appropriate paperwork, such as a Salvage Slip, Research Accession Form, or Donation Form. UMZM avoids accepting no-data specimens unless they have immediate educational use.
- **Fiduciary Responsibility:** Because of its fiduciary responsibility to maintain and preserve objects in perpetuity for the common good, UMZM will not acquire objects for which it is unable to provide adequate space, financial resources for care and conservation, and appropriate staff.
- **Use:** The Museum acquires objects specifically for the Museum's purpose defined by our mission. Objects for which the Museum anticipates no foreseeable use for research, exhibition, and/or education will not be accepted. Potential donors of such object(s) may be referred to other museums having an interest in and use for the offered object(s).

- **Commencement of Stewardship:** The time at which UMZM is considered to take possession of and legally own an object varies with the method of acquisition. The following definitions set forth the time of commencement of ownership:
 - **Field Collection:** Field collection is the principal means of acquisition of research collections. Individuals involved with field collecting are responsible for obtaining all needed permits for the applicable work undertaken and for providing the Registrar with a copy of these permits. If field collections are obtained from private land, the responsible party will obtain written permission from the landowner prior to potential collecting. If field collections are obtained from public land, the responsible party will follow all applicable laws and regulations.
 - **Exchange:** An object may be acquired through exchange for an object deaccessioned from UMZM collections or collected for exchange purposes. Exchanges are initiated by the Curator, who is responsible for deaccessions. No exchanges will be made with private persons. Scientific, natural history, and cultural institutions will have preference over all other interested parties. Ownership commences when all objects involved have entered and been accepted by the respective institutions. Reposited objects may be subject to prior land agency approval before exchange.
 - **Gift:** UMZM is considered to own the item when 1) there is intent by the donor to donate the object(s); 2) UMZM acquires the object(s); 3) UMZM accepts the object(s). Ownership commences only when these conditions have been met. A Donation Receipt will be generated by the curator for each donation to UMZM and signed by the donor and then the Curator.
 - **Bequest:** In the case of a bequest, a Decree of Distribution and a copy of the Last Will and Testament shall be obtained. The Decree of Distribution must be signed by the executor. UMZM is not obligated to accept a bequest.

7. Collections Care and Risk Management

- **Physical Care:** UMZM provides secured, climate-controlled storage areas for all its collections. Collections are housed inside hermetically sealed metal cabinets or, for oversized material, on powder coated metal shelving. Archival supplies or materials recommended by conservation specialists are used for preparation and storage of specimens. UMZM staff and volunteers are trained in proper handling procedures for their collections.

- **Environmental Monitoring:** Personnel monitor temperatures in Health Sciences (target 70°F) and Interdisciplinary Science Building (target 65°F), with specific seasonal protocols for radiator fans to prevent overheating.
- **Integrated Pest Management (IPM):** UMZM employs a "Freeze All" policy for specimens moving between buildings or from the prep lab to cabinets. Regular pest checks are conducted quarterly.
- **Risk Mitigation:** All freezers are on emergency backup power lines. In case of catastrophic failure, contents will be moved to the animal care facility chest freezer.

8. Documentation and Registration

- **Accessioning:** The act of recording an acquisition in the UMZM Accession Log and Arctos to establish the museum's right to the specimen.
- **Cataloging:** The UMZM uses a standard DarwinCore triplet format (e.g., UMZM:Mamm:1234). Data is published via GBIF and iDigBio.
- **Loans:** All outgoing transactions, including gifts, are assigned a loan number (L-YYYY-##). Specimens on Arctos must have their disposition changed to "on loan". A condition report is performed prior to issuing a requested loan.
- **Document Storage:** All physical documents related to specimens, including but not limited to, accession records, field notes, loan invoices, and historical correspondence, are stored in fire-proof filing cabinets. Digital documents are stored in Microsoft OneDrive which is administered and backed up by University of Montana IT.

9. Research Requests

UMZM welcomes and encourages the use of its collections for research and educational purposes. Guidelines and UMZM Loan Conditions are listed on the [UMZM website](#).

- **Non-Destructive Analysis:** Non-destructive analysis involves the study and analysis of museum collections without altering or removing material from the specimen.
- **Consumptive/Destructive Analysis:** Consumptive and/or destructive research involves consuming or altering some or all of a specimen or specimen part (e.g. frozen tissue sample). Destructive or consumptive requests must include explicit details regarding the amount and nature of material required, degree of expected damage to the specimens, and demonstration of successful methods for sampling and analysis of similar materials. Researchers must indicate whether the borrower or the UMZM is tasked with destructive sampling.

10. Deaccessions

UMZM holds its collections in the public trust, which obligates acting in accordance with the highest legal and ethical standards. In this regard, UMZM selects objects for deaccessioning will seldom be necessary, however, UMZM recognizes that selective culling of the collections can be beneficial to the future strength of the collections.

Reasons for deaccessioning include:

- Destructive/consumptive analysis
- Object deemed outside scope of collections
- Exchange
- Resources required for proper care are beyond those of UMZM
- Hazard to personnel or other collections (e.g. specimens containing arsenic or other heavy metals)
- Request by land agency for return of repositied material

11. Attribution

Any research or creative products using cataloged specimens at the UMZM must properly cite the specimen catalog number in DarwinCore triplet format (e.g. UMZM:Mamm:1234).

- **Research Products:**
 - Peer-reviewed publications: catalog numbers must be cited in tables, appendices, figures, and in-text references.
 - Books: catalog numbers must be cited in tables, appendices, figures, and in-text references.
 - Photographs: catalog numbers must be graphically inserted into images
 - Data Repositories: any data derived from specimens must be attributed to the specimens using the catalog number. This includes genetic/genomic data submitted to NCBI, 3D scans and models submitted to MorphoSource, and any additional data submitted to Zenodo, Dryad, or other data repositories.
- **Creative Works:**
 - Visual works including, but not limited to, photographs, paintings, and drawings must cite catalog numbers for specimen subjects in interpretive text anywhere works are displayed, both physical and digital.
 - Written works shall acknowledge the UMZM and specimens utilized.