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Acquisition as a Foundational Function of Knowledge Organization: Institutional Models and Implications for Community Archives

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Abstract

This paper examines acquisition as a foundational function of knowledge organization (KO) in archives and museums, proposing an analytical perspective informed by the challenges posed by community archives. Grounded in the understanding that knowledge organization systems are socially constructed and embedded in power relations, the study approaches acquisition not as a neutral or merely technical procedure, but as an ethical and political practice that shapes memory, representation, and access. The paper analyzes acquisition policies, regulatory documents, and accession terms from two Brazilian memory institutions—the Fundação Casa de Rui Barbosa (FCRB) and the Museu de Arte Moderna de São Paulo (MAM/SP)—to reflect on the implications of these for community-based archival practices. The findings highlight that understanding the origin and constitution of documentary sets is fundamental for structuring archival representation and enabling more inclusive descriptive practices.

1.0 Introduction

Archives and museums play a vital role in preserving and making cultural heritage accessible. They shape the scientific, cultural, and historical legacy. The process that determines what should be preserved and made accessible for future generations must be guided by clear, consistent policies to ensure that personal interests do not override collective needs. A well-defined acquisition policy is therefore essential. However, the act of acquiring is only the first step: once collections are incorporated, it becomes necessary to organize them to reveal their contextual relationships and make them intelligible and accessible. This is where knowledge organization systems play a central role.

The acquisition function in archives and museums constitutes the starting point for Knowledge Organization (KO) processes. It is a strategic and foundational stage in which the boundaries of what will be preserved, described, and made accessible are defined. Therefore, the criteria and policies that guide acquisition directly shape the informational

scope and interpretative frameworks of institutionalized memory. Within this framework, the paper argues that acquisition is a foundational moment in knowledge organization, as it determines the documentary corpus on which processes of description, indexing, and representation in archival and museum information systems are built.

Although such processes have historically been consolidated within traditional archival and museum institutions, the incorporation of new diversity agendas has strained these models, requiring revisions to the criteria, procedures, and documents that govern the accession of archives and works of art produced by diverse communities and social actors.

From this perspective, KO cannot be understood as a neutral or merely technical practice; it is influenced by prior decisions about what deserves preservation and which narratives should be transmitted. The selection of documents and objects involves value judgments and engages with various forms of memory, reflecting symbolic disputes over representation and belonging. These disputes become particularly evident when one observes that, alongside traditional institutions, minority communities and groups have been organizing themselves outside the formal institutional sphere, building their own collections and structuring memory centers focused on preserving their experiences, trajectories, and specific forms of documents. By incorporating a diversity agenda into acquisition policies, archives and museums expand KO's ability to reflect a more inclusive and democratic memory. This is exemplified by the adoption of classification systems that acknowledge cultural heterogeneity, the inclusion of underrepresented communities in indexing vocabularies, and descriptive models that are responsive to the social contexts of record creation.

In this way, the relationship between acquisition and KO proves essential not only for ensuring access to information but also for upholding the right to memory and enabling the symbolic participation of diverse social groups in the construction of heritage. In community contexts, the right to memory is usually associated with their identity and their autonomy over their collections, which implies acquisition, preservation and access processes. It is worth noting that archives and museums, as guardians of cultural heritage, must navigate the complex landscape of acquiring new collections and items that align with their institutional mission and collection development priorities (Zhao 2022).

This paper results from the collaboration between two research groups, namely, *Archives, Access and Information*, and *Archives, Libraries and Knowledge Organization*, both from Fluminense Federal University, in Brazil, recognizing the importance of discussing acquisition in archives and museums, as it guarantees the preservation and persistence of collections that, when institutionalized, are recognized as representatives of cultural heritage and trigger individual and collective memory. At the same time, it is recognized that the consolidated models of archives and museums offer fundamental theoretical, methodological, and normative support for reflecting on this emerging new reality.

2.0 Diversity and Community Archives: Challenges for Archival Science and Knowledge Organization

The interaction between different types of memory—individual, collective, historical, and cultural—is also a crucial aspect of the acquisition function. Archivists and curators play a crucial role in mediating these various forms of memory, selecting and preserving documents and artifacts that shape our understanding of the past and inform the future (Jimerson 2003). The growing recognition of intangible culture and its implications has led to the preservation and valuation of these expressions in new spaces, such as museums, memory centers, archives, and libraries. These organizations play a fundamental role in safeguarding, disseminating, and legitimizing such cultural expressions, ensuring their continuity and transmission to future generations. However, this can represent a significant challenge, particularly in contexts where memory initiatives are developed without trained professionals such as archivists, librarians, or museologists.

From the perspective of Knowledge Organization (KO), the processes through which documents enter archival and museum collections are not merely administrative procedures but constitute an initial moment in the construction of representation systems. From a domain analysis perspective, knowledge organization systems reflect the epistemic structures, interests, and perspectives of the communities that produce and organize knowledge (Hjørland 2002). In this sense, acquisition policies work as mechanisms that delimit the documentary universe of a given domain, determining which records and artifacts become available for subsequent processes of description, indexing, and retrieval. Consequently, acquisition plays a foundational role in shaping the representational possibilities of archival and museum collections.

Formally, the acquisition process is organized into stages in which collections that are candidates for future access and preservation are classified according to specific criteria related to policy, institutional mission, and objectives, while simultaneously considering a collectively expressed interest. In this context, the research examines the acquisition function in archives and museums, identifying the procedures and documents that encompass this process, to analyze the policy itself and understand how a diversity agenda may be interpreted. To this end, two acquisition models adopted by memory institutions in Brazil will be analyzed: Fundação Casa de Rui Barbosa and the Museu de Arte Moderna de São Paulo (MAM/SP). It is assumed that these consolidated models provide important references for determining acquisition parameters applicable to community archives, while respecting their specificities and strengthening their autonomy.

In the case of community archives, these dynamics become particularly visible, as the constitution of collections frequently emerges from community-driven priorities and values. From the perspective of knowledge organization, this process expands the documentary boundaries of archival domains by introducing new epistemic communities whose records challenge traditional institutional parameters of selection, acquisition, and representation.

In this study, we adopt the definition of “acquisition” provided by Fisher (2015), who defines the term as the process by which an archival institution obtains custody and control over its documentary collections. Furthermore, we recognize that acquisition involves the formal transfer of ownership of archival and museological materials—through donation or

purchase by an individual or corporate entity—or the official transfer of documents from a records creator that is part of the same organization, such as between a government agency and an archive, where formal ownership does not change. It is also worth emphasizing that acquisition policies are necessary to ensure that collection development is planned, rational, and aligned with institutional needs and priorities (Greene 2015).

Museums, in particular, must engage in a formal scientific process of art conservation, ensuring that acquired artworks and artifacts are properly assessed and cared for (Marchese 2011). The establishment of a museum collection is made effective through acquisition, which represents the materialization of the institution's mission and occurs via purchase, donation, legacy, or loan. The moment of entry of a documentary collection, artwork, or artifact—when well documented—ensures that all parties involved retain full control over the process, its history, and institutional best practices for preserving cultural heritage. Institutions with a well-founded acquisition policy have better-defined scopes for the collections that will comprise their holdings.

The moment of entry is also the point at which the documentary boundaries of a collection are defined. By determining which materials will be incorporated into institutional fonds, acquisition policies establish the limits of what can subsequently be organized, represented, and made accessible. Institutions with well-founded acquisition policies therefore possess clearer parameters regarding the scope and composition of their collections, which directly influences the development of descriptive practices and access mechanisms within archival and museum information systems.

3.0 Institutional Acquisition Models

At the methodological level, the study identifies and analyzes the documentation produced around the acquisition of collections and artworks in the institutions examined, discussing how acquisition models that consider diversity may influence the development of institutional knowledge organization (KO) systems, particularly in terms of how different social groups and perspectives are represented.

The investigation is grounded in the understanding that knowledge organization systems are socially constructed and shaped by power relations (Bowker and Star 1999). Accordingly, the study examines whether acquisition arrangements and descriptive practices reproduce exclusionary classificatory paradigms or contribute to the inclusion of diverse voices, knowledge systems, and forms of memory. Based on the analysis of acquisition terms and Deeds of Gift, as well as institutional acquisition policies, the research analyzes two institutional models and outlines measures to strengthen diversity in the acquisition processes of archives and museums.

3.1 Museu de Arte Moderna de São Paulo (MAM/SP)

The first institution analyzed in this study is the Museu de Arte Moderna de São Paulo (MAM/SP). Founded on July 15, 1948, by Francisco Matarazzo Sobrinho (Ciccillo Matarazzo), the museum was established as a private, non-profit institution dedicated to the promotion of modern and contemporary art in Brazil, inspired by the Museum of Modern Art (MoMA) in New York. Initially, the institution did not have a formal acquisition policy, and its collection was largely formed through works from the private collections of Ciccillo Matarazzo and Yolanda Penteado, as well as donations from Nelson A. Rockefeller.

Following financial difficulties and internal disputes, the museum was dissolved in 1963 and its assets transferred to the Universidade de São Paulo (USP). The institution was later reestablished and is currently located in Parque do Ibirapuera. Today, MAM/SP holds more than 5,400 works across multiple artistic media and maintains policies dedicated to the conservation and expansion of its collection, along with educational and accessibility programs.

Based on a project carried out between 2022 and 2023 at MAM/SP, which examined approximately 90,000 physical and digital documents related to collection management, it was possible to identify the documentation associated with the acquisition function and to gain a more in-depth understanding of the procedures that comprise it.

The systematic mapping of this documentation, conducted by a multidisciplinary team, enabled the identification of 48 activities related to collection management and to the organization of documentation within the Collection Department, with the aim of improving information retrieval processes for the museum's staff. In this context, the process of acquiring works of art is part of the documentary set referred to in Museology as museum documentation, which is constituted at the moment of the work's entry and remains essential throughout its entire institutional management lifecycle. Among the documents that comprise acquisition processes are the *deed of gift, the certificate of authenticity of the artwork, the conservation report, the artist's biography, the document establishing market value,* as well as the *copyright assignment agreement* or the *copyright licensing agreement*.

The term "acquisition" thus designates all forms of entry of artworks into the museum, which, throughout the institution's history, include purchase, donation, bequest, and loan. It is worth noting that the Statutes, approved by the General Assembly on November 6, 2025, establish in Article 1, Paragraph 1, that the Museum "may acquire works of art or receive them by loan or donation, and promote exhibitions, courses, conferences, screenings, competitions, and other activities aimed at fulfilling its purposes, in Brazil or abroad" (Museu de Arte Moderna de São Paulo 2025, 1). The Statutes also constitute the document that formalizes the composition of the Advisory and Fiscal Councils elected by the General Assembly. The Advisory Council holds responsibilities directly related to the art collection, such as authorizing the Executive Board to acquire, dispose of, mortgage, or otherwise encumber the assets that make up MAM's artistic holdings, as well as approving the acceptance of donations and bequests intended for incorporation into the museum's assets that exceed the value threshold established in the Statutes for collective donations

and bequests (collections). What is established in the Statutes reflects an ongoing institutional effort to regulate and standardize the forms of acquisition within the museum.

Currently, the MAM/SP collection comprises more than 5,400 works of art, encompassing categories such as painting, sculpture, printmaking, video, and performance, among others, which are presented in temporary exhibitions held both at MAM and at other national and international institutions. Among the forms of entry of artworks into the museum, donation is the most recurrent. The process begins with contact between the potential donor and the institution, through which the intention to donate the artwork to the museum is formally expressed. Following this initial contact, the Art Committee evaluates the work's relevance and its alignment with MAM's curatorial framework. The decision to incorporate the work into the collection is taken in conjunction with the Executive Board. When there is mutual interest between the donor and the institution, the formal accession process begins, involving the production and circulation of all required documentation, culminating in the registration of the work's entry with the assignment of an accession number. It is essential to emphasize that the documentation produced during the acquisition of a work of art forms the basis for its institutional management, as it establishes parameters for conservation actions, loans, insurance, installation and deinstallation, circulation, and use of the works.

The experience of MAM/SP thus demonstrates how consolidated institutional models of acquisition and documentation can offer relevant insights for reflecting on acquisition parameters in community-based contexts, particularly concerning the importance of accession documentation for understanding the origin of documentary sets and for structuring practices of knowledge organization and representation that are sensitive to diversity. Additionally, the documentary mapping project enabled the analysis of different legal instruments used to formalize acquisition. The documentation examined, produced between the 1970s and 2022, evidences a process of institutional maturation with regard to the formalization of models for deeds of gift and other legal instruments employed for the accession of works into the museum.

3.2 Fundação Casa de Rui Barbosa (FCRB)

The second institution analyzed in this study is Fundação Casa de Rui Barbosa (FCRB). FCRB was created by decree in 1924 and inaugurated on August 13, 1930. Rui Barbosa was a politician who played a leading role in the formation of the Republic in Brazil, in the drafting of the first Republican Constitution, and in the end of slavery in the country. The institution was created to preserve his legacy and thinking. It is a nearly century-old federal public institution linked to the Ministry of Culture. Its mission is to preserve and provide access to the work of Rui Barbosa, its collection, and that of prominent figures in the country (politicians, Brazilian writers, historians, and educators), promoting research, teaching, and the dissemination of knowledge on topics relevant to the construction of Brazilian culture and memory.

The acquisition of personal archives over many years followed practices intertwined with personal networks and poorly standardized procedures, shaping the institutionalization of archives. With the social movement regarding access to public documents, which in Brazil culminated in the Access to Information Law (LAI) - Law No. 12.527/2011, institutions began to revisit their procedures and seek standardization for the acquisition process. As a result, some institutions created their own Archival Acquisition Policies. It is important to mention that an archival acquisition policy involves, at a minimum, defining priorities and goals in the short, medium, and long term; establishing cost-benefit analysis to guide the decision-making process; developing routines and procedures; attracting and managing resources; the need to develop specific projects; establishing actions for physical interventions, inspections, reproduction for preservation and access; and also process innovation (Oliveira 2012).

Fundação Casa de Rui Barbosa then began to study the different processes the institution had experimented with over the years, the workflow, the types of documents created, and the principles followed to establish its own Policy. Finally, in 2015, the document *Diretrizes para a aquisição de acervos arquivísticos* (Guidelines for the acquisition of archival collections) was launched (Fundação Casa de Rui Barbosa 2015). For this purpose, the institution assembled an interdisciplinary team, including archivists and the FCRB attorney. Bibliographic research was conducted to identify policies or guidelines adopted by various institutions in the country and abroad. All data collected about the procedures adopted in FCRB were analyzed. The document addresses only the acquisition method through donation, as this is the most common way for a public institution to acquire private documents, and establishes ten criteria for acquiring collections. We highlight: the Foundation only accepts documents whose provenance and origins are verified; the donor must have the legal authority to donate (but in exceptional cases where this legal certainty is not available, the institution may receive the collection after justification, prioritizing its preservation in this case); the collections to be received should preferably be private archives and collections of educators, historians, writers, jurists, thinkers or literary figures, or of individuals or families who have developed activities that have influenced history and culture.

Regarding the procedures, we will highlight: the need to officially communicate the proposed donation of the collection to FCRB, at which time the proposer clearly states their willingness to donate the collection, their authority as the donor, and their intention to donate the copyright, when applicable; it is important to emphasize that the unit responsible for receiving the collection must carry out an inspection visit to analyze the state of conservation of the collection and its quantity. To formalize the receipt of the archival collections at the institution, the parties must sign the *Donation Agreement document*, with or without the assignment of copyright. In addition to the personal information of the parties, the document must contain information about the documentary collection, as well as about issues of access, reproduction, maintenance, and preservation of the collection. Documents with restricted access must be identified by the donors, and their identification must be included in the *Donation Agreement*. The donor must provide basic information: identification, origin, provenance, quantification, and packaging units.

The document offers contract templates that can be used in different donation contexts: such as Donation Contract with assignment of copyright (to be used when the donor is the copyright holder and assigns it fully and definitively to FCRB, which then becomes the copyright holder of the collection); Donation Contract without assignment of copyright (to be used when the donor is the copyright holder, but restricts the use of the collection's content, especially in relation to third parties); and Donation/Assignment of Possession Contract (to be used when the donor is not the copyright holder).

With the systematization of norms, standardization of procedures and their documentary representations, it was possible to streamline the process of adding collections and make it more focused on the best interest of the institution. In addition, it was possible to provide greater legal security to the processes.

The analysis of these two institutional acquisition models highlights how the documentation produced during the accession process constitutes the foundation for subsequent processes of knowledge organization. Deeds of gift, acquisition terms, conservation reports, and provenance documentation establish the acquisition framework that later supports description, indexing, and access practices within institutional systems. From a knowledge organization perspective, these documents delimit the documentary corpus and provide the contextual information necessary for representing collections and artworks within institutional information environments.

In the context of community archives, where acquisition processes are often less formalized and strongly grounded in community relationships, the observation of consolidated institutional models does not imply the adoption of rigid procedures. Rather, it allows the identification of minimal documentary elements—such as provenance information, terms of donation, and statements regarding access and use—that can support the organization and representation of collections while respecting community autonomy. In this sense, acquisition documentation becomes a key element for structuring knowledge organization practices that are capable of representing diverse experiences, forms of memory, and community-based knowledge.

3.3 Toward an acquisition framework

Based on the analysis of the acquisition models adopted by MAM/SP and Fundação Casa de Rui Barbosa, this study proposes a conceptual framework for acquisition (Table 1) that highlights the documentary and procedural elements necessary to support knowledge organization processes while remaining adaptable to community-based archival contexts.

Table 1 Acquisition framework

Dimension	Key Elements	Contribution to Knowledge Organization
Selection criteria	mission, relevance,	defines documentary corpus

	diversity	
Provenance documentation	origin, context, biography	supports contextual description
Legal agréments	donation terms, deed of gift, copyright	regulates access and use
Collection documentation	conservation reports, accession records	supports description and retrieval

The framework proposed in Table 1 synthesizes the key dimensions identified in the acquisition models, highlighting how the documentation and procedures associated with acquisition constitute the foundation for subsequent knowledge organization processes. By defining selection criteria, documenting provenance, establishing legal agreements, and structuring access to the documentation, acquisition practices delimit the documentary corpus that will later be described, indexed, and made accessible within KOSs. From a knowledge organization perspective, these elements provide the contextual information necessary to represent collections coherently and meaningfully, while respecting the domains. At the same time, the framework does not aim to reproduce institutional procedures in community archives, but rather to identify minimal documentary elements that can be adapted to different contexts. In community-based initiatives, these elements may support the organization and representation of collections while preserving community autonomy and recognizing the plurality of experiences, memories, and forms of knowledge that these archives seek to safeguard.

4.0 Conclusions

In general, the acquisition of collections should incorporate an agenda that prioritizes diversity and inclusion. In archives, this may occur through acquisition processes that address the realities of different communities and social groups, supported by regulatory documents that consider the specific conditions of donors. In museums, such an agenda may be expressed through the incorporation of artworks produced by artists from diverse backgrounds, while in community archives it often emerges through community-led decisions regarding what should be preserved and transmitted to future generations.

The acquisition function in archives and museums is therefore a complex process that precedes knowledge organization (KO) activities within institutions. Beyond determining the entry of materials into custody, acquisition defines the documentary corpus from which processes of description, indexing, and representation will later emerge. Historically, many institutions prioritized the archives of socially prominent individuals, but contemporary debates increasingly challenge this tendency by questioning why the archives of ordinary people or community-based documentary sets should not also be preserved.

The consolidation of institutional acquisition models, characterized by the progressive formalization of procedures and the documentation produced around the entry of collections, offers important insights for reflecting on acquisition policies in community archives. Documentation such as legal instruments and accession records demonstrates that acquisition is not limited to the act of entry but constitutes a structuring process that defines responsibilities, preservation conditions, and access parameters over time.

From a knowledge organization perspective, acquisition policies establish the boundaries of what can later be organized and represented within institutional information systems. In community archives, where practices are grounded in local relationships and community autonomy, the observation of consolidated institutional models may help identify minimal documentary elements—such as provenance information, donation terms, and access conditions—that can support preservation and representation without imposing external frameworks.

Recognizing acquisition as a foundational moment in the constitution of collections therefore contributes to strengthening the dialogue between Archival Science and Knowledge Organization, highlighting its role in shaping the documentary corpus that enables inclusive representation while safeguarding the right to memory.

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