AT THE CORE: ADOPTING STANDARDS FOR COLLECTIONS AND MUSEUM MANAGEMENT

FAM Annual Conference
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1:15-3:15 pm

Panel

- Rachel Porter, Director, Research and Programming, Florida Historic Capitol Museum, PORTER.RACHEL@flhistoriccapitol.gov
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Agenda

- Today's Workshop: Organization and Expectations
- Introduction
- AAM's Program and Requirements
- Code of Ethics
- Strategic Institutional Plan
- Collections Management Policy and Collections Plan
- Round Table Discussions

Today's Workshop: Organization and Expectations

- Organization:
  - Three breakout, round table discussions
  - One table for each document (Code of Ethics, Strategic Planning, Collections Management Policy)
  - You may rotate between tables or stay at one table.
  - 20 minutes/table to attend all three tables
- Expectations:
  - Learn what the five core documents are
  - Understand how to write the three documents covered today
  - Have the basic knowledge and tools to create an outline for a document or and/or improve or finish a document

Introduction

- What are the core documents?
  - Mission Statement
  - Institutional Code of Ethics
  - Collections Management Policy
  - Institutional Strategic Plan
  - Disaster Preparedness and Emergency Response Plan

AAM's Core Documents

Introduction

- What are the core standards?
  - Public Trust and Accountability
  - Mission and Planning
  - Leadership and Organizational Structure
  - Collections Stewardship
  - Education and Interpretation
  - Financial Stability
  - Facilities and Risk Management

AAM's Core Standards, Core Standards for Museums in Plain English

Introduction

- Why have core documents and why meet professional museum best practices and standards?
- Public accountability and trust
- To become accredited or not to become accredited?





Accreditation Program Benefits

AAM’s Program and Requirements

- The Continuum of Excellence





AAM's Continuum of Excellence

AAM’s Program and Requirements

- The Pledge of Excellence



AAM's Pledge of Excellence

Documents Covered in Today's Workshop

MA | Code of Ethics 2025





INSTITUTIONAL CODE OF ETHICS

Institutional Code of Ethics-What?

- Codifies a set of standards for acting morally according to set values
- Expresses the institution's policies, consistent with the public service it affirms in its mission statement
- Puts the interests of the public ahead of the interests of the institution or of any individual and encourages conduct that merits public confidence
- Acknowledges applicable laws and appropriate discipline-specific professional practices in order to help museums meet or exceed them.

Institutional Code of Ethics-Why?

- Ensures accountability
- Ensures informed decision making
- Leads to informed oversight
- Creates internal agreement
- Serves as a practical and effective tool in risk management

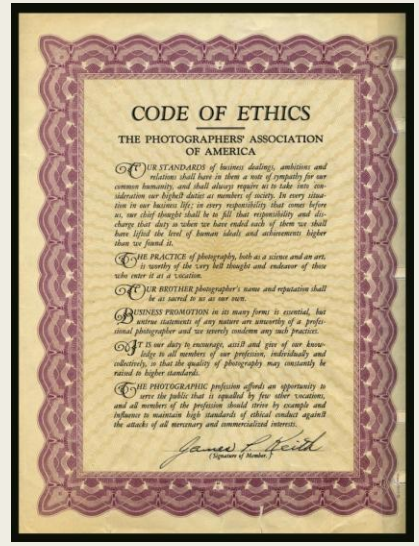


Institutional Code of Ethics

- Key Components
  - Governance
  - Accessioning
  - Deaccessioning
  - Collections care
  - Programming
  - Personnel
  - Implementation
  - Any other sections necessary for the museum itself



Institutional Code of Ethics


CODE OF ETHICS

THE PHOTOGRAPHERS' ASSOCIATION OF AMERICA

OUR STANDARDS of business dealings, ambitions and relations shall have in them a note of sympathy for our common humanity, and shall always require us to take into consideration our highest duties as members of society. In every situation in our business life; in every responsibility that comes before us, our chief thought shall be to fill that responsibility and discharge that duty in which we have ended each of them we shall have lifted the level of human ideals and achievements higher than we found it.

THE PRACTICE of photography, both as a science and an art, is worthy of the very best thought and endeavor of those who enter it as a vocation.

OUR BROTHER photographer's name and reputation shall be as sacred to us as our own.

BUSINESS PROMOTION in its many forms is essential, but untrue statements of any nature are unworthy of a professional photographer and we severely condemn any such practices.

IT IS our duty to encourage, assist and give of our knowledge to all members of our profession, individually and collectively, to that the quality of photography may constantly be raised to higher standards.

THE PHOTOGRAPHIC profession affords an opportunity to serve the public that is equalled by few other vocations, and all members of the profession should strive by example and influence to maintain high standards of ethical conduct against the attacks of all mercenary and commercialized interests.

James P. Keith
(Signature of Member)

- Ethical guidelines related to:
  - Duties of the governing authority, staff, and volunteers
  - Relationship between governing authority and director
  - Conflicts of interest
  - Ethics of collecting
  - Management practices
  - Management of business or individual support
  - Commercial activities
  - Political activities
  - Responsibility to the public

STRATEGIC INSTITUTIONAL PLAN

- WHAT?
  - A living document that supports the mission of the museum with a scope of 3, 5, 10 years
  - A document that identifies goals and tests strategies to reach its goals and can be adjusted with findings
- WHY?
  - Cohesive sense of purpose
  - Prioritizes resources
  - Tool for fundraising

First, Mission Statement:

- Know what you want to do and why it makes a difference to anyone.
- Put it in writing and stick to it!
- A primary benchmark to evaluate museum's performance

"National Standards and Best Practices for U.S. Museums" The AAM, published 2008

On to Strategic Institutional Planning!

- Decide what you want to do next.
- When you are deciding, ask lots of people for their opinions.
- Put it in writing… then do it.
- If it didn’t work, don’t do it again.
- If it did work, do.

“National Standards and Best Practices for U.S. Museums” The AAM, published 2008

How to build a Strategic Institutional Plan:

- Identify key stakeholders and ask lots of questions to identify vision.
- Boil down information to prioritize goals.
- Are they SMART?
  - *Specific, Measurable, Achievable, Relevant, Time-bound*
- Design strategies to achieve goals
- Write down and put into action!

Key Components:

- Current and multi-year
- Aligned with current mission
- Includes a summary of the planning process
- Articulates a strategic vision and goals as well as actions steps to achieve them
- Covers all relevant areas of museum operations
- Identifies the human and financial resources required to carry out the plan
- Assigns responsibility for completion of action steps
- Includes information about how success will be measured and evaluated
- Bears date approved by the governing authority

COLLECTIONS MANAGEMENT POLICY

Collections Management Policy - Why?

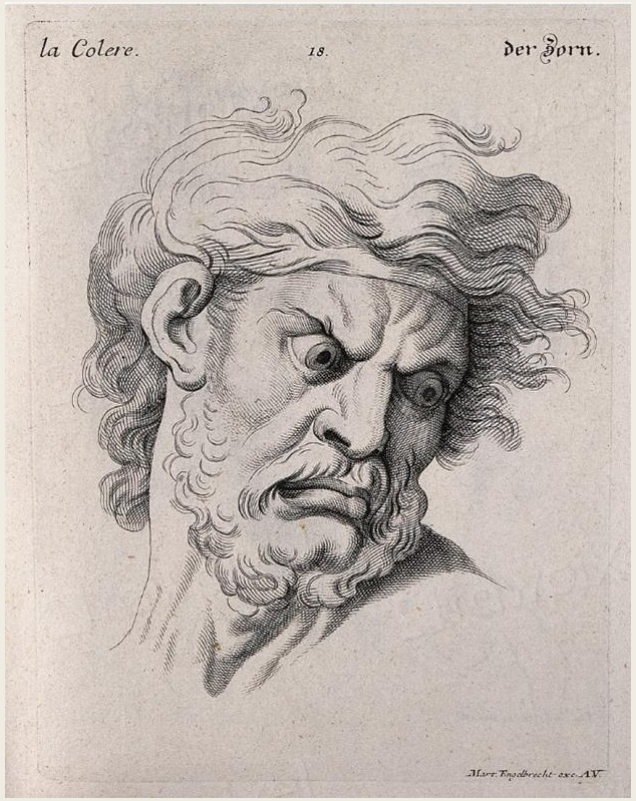


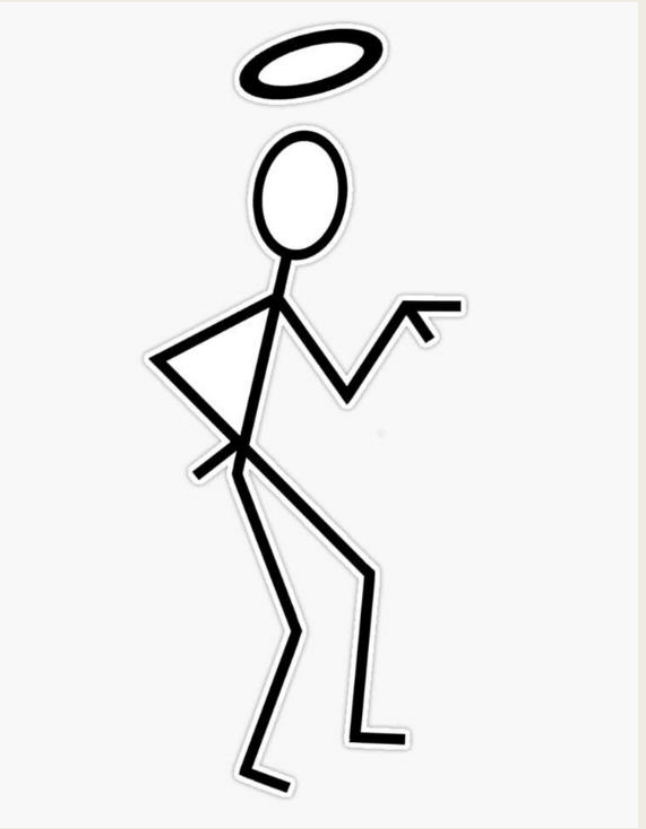
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Collections Management Policy - Why?







Collections Management Policy

Key Components:

- Acquisitions/Accessions
- Deaccessioning Protocols
- Loans – Incoming and Outgoing
- Collections Care and Conservation
- Inventory
- Documentation and Record Keeping
- Access and Use of Collections
- Insurance and Risk
- Legal/Ethical

Collections Management Policy

What it is not:

- A procedure manual
- A strategic document to guide donor cultivation
- The only document an organization needs

Supporting Documentation

- Collections Development Plan
- Collections Procedure Manual

ROUND TABLE DISCUSSIONS

DROPBOX: RESOURCES AND REFERENCES



https://bit.ly/PolicyResources