

# COLLECTIONS MANAGEMENT POLICY

## A. W. PERRY HOMESTEAD MUSEUM

### I. INTRODUCTION

The Collections Management Policy of the A. W. Perry Homestead Museum establishes guidelines for the acquisition, deaccession, loan, care and use of its collections. This policy shall not replace any local, State, or Federal law, statute or regulation under which the Museum is legally or ethically bound to operate.

The A. W. Perry Homestead Museum was established in 1974, through a donation by the Gravley family of the 1909 home and surrounding property, and opened to the public in 1976 with the intention that it be used to house objects that exemplify the pioneer spirit of Carrollton and North Texas, as well as significant art, artifacts and memorabilia relating to the social, cultural, economic and political history of this community in particular and the State of Texas in general. The Museum is operated and maintained by the City of Carrollton, through the Parks and Recreation Department. The Carrollton City Council appoints a nine (9) person advisory board to assist staff with the development of policies and guidelines concerning Museum operations.

#### **Definitions:**

These terms are used throughout the policy:

**Accession:** an object, or group of objects, acquired from a single source at one time.

**Acquisition:** the discovery, preliminary evaluation, negotiation for, taking custody of, documenting title to, and acknowledging receipt of objects, or negotiating for and recording information about borrowed objects.

**Catalogue:** all the information about an object arranged in meaningful categories.

**Collection:** the term is used in two manners; first refers to the whole Museum collection; the second refers to a group of objects associated together for some reason or another.

**Documentation:** is all the data that is collected on an object.

**Deaccession:** the formal process of removing an object from the Museum's collection.

**Object:** a generic term used in this policy to refer to items in Museum's collection.

### II. STATEMENT OF PURPOSE AND COLLECTING OBJECTIVES

## **Mission Statement**

*The mission of the A. W. Perry Homestead Museum, a designated historic site, is to educate diverse audiences through the collection, preservation, and interpretation of the late 19<sup>th</sup> and early 20<sup>th</sup> century history of Carrollton and the state of Texas, while making appropriate use of the authentically restored Perry home and outbuildings.*

## **Scope and Use of Collections**

The collections of the A. W. Perry Homestead Museum include structures, furnishings, ceramics, textiles, art, tools, artifacts, photographs, and other archival materials which relate to 19<sup>th</sup> and early 20<sup>th</sup> Century Carrollton and North Texas. The collections are maintained by Museum staff.

## **Collection Categories**

All items accepted for the A. W. Perry Homestead Museum collections will be placed into one of the following categories: permanent collection, education collection, image collection, research collection, museum archives. Only items placed in the permanent collection will be accessioned. All items in the education collection will be marked as such.

- **Permanent Collection:** These items support the Museum's collection goals and will only be used for research, exhibition, and education. Materials in this category are catalogued, numbered, and maintained according to the current record keeping system of the Museum which is organized into the museum record keeping software as follows: Part 1: Year(YYYY): The year the item was accessioned, not when it was created Part 2: Accession Number (###): A sequential number assigned to a specific group of items received together, (a "lot") usually from same donor or source, within the last year. Part 3: Object Number (####) A sequential number assigned to a specific item within that group.) Optional Suffixes: Letters (e.g., a,b,c) are sometimes added to represent parts of a single object (e.g., a lid for a teapot).
- **Education Collection:** This group includes items specifically acquired for hands-on use, support, or educational purposes. These items are not accessioned into the collection. It may consist of objects which are either reproductions, duplicates of objects in the permanent collection, or objects without historical documentation or significance that have been deaccessioned from the Permanent Collection. It shall also consist of objects which meet the Museum's mission but do not fulfill the acquisition criteria. A gift agreement, purchase invoice, or other proof of ownership transfer to the Museum must be placed on file. It is understood that the use of these items may result in damage to the object, although all care will be taken to try to prevent such damage.

Items in this category may be disposed of in an ethical manner whenever the object has become too damaged or deteriorated to maintain its historical integrity, education value, safety, or adequately justify its retention in the collection.

- **Image Collection:** The Image Collection shall consist of modern or reproduction prints, slides, CDs, DVDs, videos, digital images, or negatives either created by Museum staff or their representatives, donated to the Museum, or deaccessioned from the Permanent Collection. Items accepted into the image collection shall be associated with Carrollton and North Texas history or with the Museum and its activities.
- **Research Collection:** The Research Collection shall consist of actual or reproduction books, journals, newspaper articles, maps, documents, and manuscripts. Items accepted into the Research Collection shall provide information about Carrollton history and its environs, reflect regional and national historical events or cultural influences that have impacted Carrollton, or offer information about historical collectibles consistent with the collecting priorities of the Museum.
- **Museum Archives:** The Museum archives shall consist of posters, brochures, programs, records, architectural models, and memorabilia relating to the history of the Museum.

Limitations of space and of qualified staff for the care of objects shall be considered in conjunction with all acquisitions for the education, image, and research collections and the Museum archives.

### III. ACQUISITIONS/ACCESSIONING

#### Method of Acquisition

Items are added to the A.W. Perry Homestead Museum collections through gifts, bequests, purchase, exchange, or other means of transferring ownership to the A.W. Perry Homestead Museum. Purchases must conform to the goals and mission of the A.W. Perry Homestead Museum. Limitations of space and of qualified staff for the care and study of objects shall be considered in conjunction with all acquisition priorities for the Permanent Collection.

The Museum staff and Museum Board have the sole authority to accept or decline any additions to the Museum collections. Acceptance of an object into the permanent collection requires a vote of the Museum Board. The Museum accepts items into its collection only unconditionally. Donated items become the permanent property of the

A. W. Perry Homestead Museum without restrictions and the Donor waives all rights thereto.

No object may be left for examination without the prior written consent of the Museum Specialist. Only the Museum staff may accept an object for examination or identification. When leaving an object for examination, a “**temporary custody form**” must be completed by the owner. A specific date must be agreed upon for the retrieval of the object. Any object left at the Museum for three months past the agreed upon date will be considered abandoned by the owner, and becomes the full legal property of the Museum. These objects may either be accessioned into the collection or disposed of, at the discretion of the Museum staff.

When considering an item for acquisition into the collection, the following guidelines will be adhered to:

1. Is the item consistent with the scope of the A. W. Perry Homestead Museum?
2. Will the object enhance collection categories which lack representation?
3. Is the object physically stable enough for interpretive use? Can it be properly preserved in the future?
4. Will the item be used in the foreseeable future?
5. Is the Museum capable of providing appropriate storage or exhibition space that is of museum quality and standards?
6. Does the Museum collection include items of similar use or design?
7. Would the historical integrity of this item be better preserved if placed in another institution’s collection?

#### **Acquisition Priorities for the Permanent Collection**

1. Relating to the history and development of Carrollton, Texas and the region
2. Ability to fill gaps in current collections.
3. Future or immediate use in exhibits, research or interpretive programs.

#### **Temporal Scope**

The interpretive focus of the site is 19<sup>th</sup> and early 20<sup>th</sup> century history of Carrollton and the state of Texas in general. The Museum collects historical objects from the 1840s-1930s, which is the current interpretive time period for the furnishings of the 1909 Perry Home.

#### **Terms and Conditions of Acquisition**

1. The A. W. Perry Homestead Museum will acquire and accession only those objects which directly support its mission and goals, and only when the Museum can provide proper care, storage, and preservation in keeping with established professional standards.
2. All donations to the A. W. Perry Homestead Museum are the sole property of the Museum, offered without limiting conditions or restrictions of any kind. The Donor must warrant and express that the donated items(s) are the sole property of the Donor and that such item(s) are not subject to any liens, restrictions, interests, rights, or claims of others. The Donor gives up all rights and privileges of ownership of the items donated to the Museum. The Museum will not return any donations to the Donor, the Donor's family or assigned heirs.
3. A Gift Agreement shall contain the entire agreement between the A. W. Perry Homestead Museum and the Donor, and there shall be no other expressed or implied terms or conditions which are not set forth in the agreement. The Gift Agreement will be governed by the laws of the State of Texas.
4. The A. W. Perry Homestead Museum retains to sole copyright to all items in its collections. A Donor must grant an irrevocable license to copy, use, duplicate, photograph, and reproduce the donated items(s) for any purpose in the furtherance of the Museum's objectives, goals, mission and activities.
5. The Museum has no obligation to retain any donated item and has the right to use or dispose of any donated items at any time at its absolute and sole discretion. The Museum has the further right to restore, repair, reconstruct, refurbish, or reproduce any donated items. The Museum reserves the right to dispose of any irrelevant material as a collection is processed. The Museum staff will determine whether an item is to become part of the accessioned collection.
6. The Museum staff will refrain from making any appraisals or verification of authenticity of any object brought to the museum. The Museum will not make any representations, warranties, or appraisals regarding the value of donated items. The staff of the A. W. Perry Homestead Museum is prohibited from giving appraisals for tax purposes of objects being offered to the Museum collection. The Museum will neither pay for an appraisal nor reimburse a donor for appraisal costs. If the donation is intended to be tax deductible, it is the responsibility of the Donor to establish the value of the donated item(s) and whether the gift complies with all the applicable federal, state, and local tax laws.
7. The A. W. Perry Homestead Museum has no obligation to exhibit or display any donated item, either temporarily or permanently.
8. Requests for exceptions to the A. W. Perry Homestead Museum acquisitions policy must be submitted in writing to the Museum Specialist, and will be granted only with the approval of the Museum Board. Implementation of the acquisition policy will be affected through the Museum Specialist..

## Registration

Registration serves to maintain legal control of the Museum collections. The Museum staff is responsible for the initiation and maintenance of all collection records. For every object that is accepted as a part of the Museum collections, a purchase invoice, Gift Agreement, Loan Agreement, or other proof of ownership transfer must be filed. When items are transferred from a loan to a gift status, a Gift Agreement must be filed.

The Museum Specialist maintains accession and deaccession records which include Deeds of Gift, correspondence, historical information, and other relevant documents for the collections. Records shall be made in a timely manner, housed in secure locations, and physically preserved by proper handling and storage methods. The Museum Specialist shall maintain records that are complete, accurate, orderly, retrievable, and current. A duplicate copy of all records shall be maintained.. Registration records will be maintained in both hard copy and electronic form. All Gift or Loan Agreements will originate in paper form and a digital record is created in the Museum's collection database. The following registration information will be maintained in electronic format: accession number, date of acquisition, item description, donor information, exhibit status, inventory location, condition report, and collection status.

### **Nomenclature**

The A. W. Perry Homestead Museum uses the Chenault Nomenclature for Museums to order, maintain, and research its collections.

## **IV. DEACCESSION AND DISPOSITION**

The A. W. Perry Homestead Museum reserves the right to deaccession any item(s) from the official museum records under the following guidelines:

1. The artifact(s) is damaged beyond reasonable repair.
2. The collection contains more than three items of the same or like origin, quality, or use.
3. The artifact does not adequately reflect the goals and mission of the Museum.
4. It is not economically feasible for the Museum to retain the artifact. Factors for this decision include, but are not limited to, cost of storage, insurance, restoration costs, physical liability.
5. The Museum cannot provide museum quality preservation, restoration, or storage of the item.
6. The Museum cannot accurately exhibit the item, thereby maintaining the historical integrity of the item.
7. The object does not meet the criteria to have been accessioned.

Any item deaccessioned from the permanent collection must be considered as a candidate for the education collection. If the artifact is not deemed necessary or appropriate for the education collection, then the item may be disposed of. The following guidelines must be followed for the disposition of deaccessioned items:

1. Can the item be placed in the collection of another institution?

2. Is the item of such historical importance that it must, under all circumstances, be preserved?
3. Is the item damaged beyond any reasonable repair?
4. Is the item physically dangerous? (i.e. sharp edges, toxic, explosive, etc.)
5. Does the object have any monetary value?

### **Methods of Dispersal**

The disposition of deaccessioned items falls under the discretion of the Museum Specialist and Museum Board, but must be undertaken without jeopardizing the integrity or ethics of the Museum. Any moneys resulting from the sale or transfer of deaccessioned artifacts must be placed in the collection replacement fund. These funds may not be used for general operating expenses, and may only be used for the preservation or acquisition of other objects in the A. W. Perry Homestead Museum collection.

Any item to be deaccessioned must be brought before a vote of the Museum Board for their approval. The reason(s) for the deaccession must be discussed, as with the proposed disposition of the object(s).

These methods are not ranked in order of preference; any method may be applied as long as it is deemed the most appropriate one given the nature of the object and the general interests of the public.

1. An object may be placed through gift or exchange in another tax-exempt public institution, preferably in North Texas.
2. An object may be placed into the Museum's education, image, or research collections, or in the museum archives.
3. An object may be sold by private or public sale, as recommended by the Museum Board. However, an object shall not be given, sold, or otherwise transferred, publicly or privately, City of Carrollton employees, Council members, Museum Board, Friends of the Museum Board members, or their families or representatives.
4. An object may be donated to a charitable institution (e.g., a thrift store) if its intrinsic or monetary value is so low as to make burdensome the effort of finding an institutional home for it or offering it for sale. Must follow current City policies regarding these type of transfers.
5. An object may be destroyed if it is significantly deteriorated and if no further use for it can be found. The Museum shall follow the practice of "witness destruction," in which one staff member witnesses another staff member's destruction of an object.
6. An object may be transferred to its legal owner(s) should the legality of the donation be contested and non-Museum ownership sufficiently proved. The Museum may act as the repository for the object while its true ownership is determined.

The Museum Specialist shall follow all deaccession procedures as outlined in the Collections Procedures Manual and shall be responsible for maintaining all records

pertinent to the collections. The Museum Specialist shall also maintain a complete and current list of objects which have been deaccessioned. This list may be distributed in response to any responsible inquiry.

## **V. LENDING AND BORROWING COLLECTIONS**

**Outgoing Loans:** The A. W. Perry Homestead Museum recognizes the need to allow other institutions and entities to borrow objects from the collections, but it also recognizes its responsibility to ensure that the loaned objects are properly cared for and exhibited.

Objects will not be loaned if, in the opinion of the Museum Specialist and Museum Board, they are of such importance, rarity, and/or fragility that they must not be exposed to any danger of loss by removal from the Museum. The A. W. Perry Homestead Museum reserves the right to refuse any request for a loan for any reason deemed sufficient by the Museum.

### **Loan Conditions and Terms:**

1. Loans of accessioned items may be made to non-profit, cultural, historical, and educational institutions, museums, and societies for exhibits open to the general public. In some instances, commercial, governmental, or other organizations may receive A. W. Perry Homestead Museum loans; however, these recipients must meet all the qualifications, standards, and procedures required for loans.
2. Artifacts shall not be loaned for decorative, political, or non-educational purposes.
3. At no time may the historical integrity of the loaned artifacts be jeopardized. All loaned materials must be exhibited in a culturally and historically sensitive manner.
4. Loans to commercial firms, governmental bodies, and other groups will be made only if the borrower uses the materials as a part of a “museum quality” interpretive and educational exhibit. These non-traditional borrowers must adhere to the same requirements established for all institutions. In addition, these borrowers must secure the services of qualified staff to monitor the condition of the artifacts and their environment for the duration of the loan.
5. It is the policy of A. W. Perry Homestead Museum to decline to lend accessioned materials to individuals, including the original donor, for any reason.
6. Objects loaned by the A. W. Perry Homestead Museum must not be used in connection with items for sale, or with invitations to purchase items, or in commercials.

### **Incoming Loans**

Incoming loans of objects for exhibit, research, identification or educational purposes are arranged by the Museum Specialist and approved by the Museum Board for up to one year, after which the loan may be extended.

The Museum will exercise the same care with respect to loaned materials as it does with comparable property in its own collections.

An incoming loan agreement is provided to the individual or lending institution. Materials on loan to the Museum may not be transferred or loaned by the Museum to a third party without explicit permission from the individual or lending institution.

It is the responsibility of the lender to notify the Museum regarding changes of address or ownership affecting materials on loan. The Museum follows procedures set forth in the Texas Property Code, Title 6A, Chapter 80, Property Loaned to Museums, when it is necessary to resolve unclaimed or abandoned loan issues.

The Museum/City of Carrollton does not insure incoming loans during transit or while on premises (wall-to-wall). If the lender elects to maintain his/her own insurance coverage, the Museum must be supplied with a Certificate of Insurance.

### **Permanent Loans**

The Museum does not accept objects into its collections as permanent loans. Loans will be accepted only for temporary exhibition, or for purposes of research or duplication. Indefinite term loans are not allowed. A definite term for the loan must be agreed upon before accepting the item. No objects may remain under the care of the Museum without a fully executed Loan Agreement Form that is renewed annually.

The staff should make every effort to clear up these loans that are currently in its care and either return the object to the owner or acquire legal title. Under no circumstances will the Museum accept such loans in the future.

## **VI. CARE AND CONSERVATION**

The Museum holds and cares for all objects as a public trust and is committed to the standards set by the American Institute for Conservation and American Alliance of Museums. The authority for collections care is vested in the Museum Specialist.

### **Preservation**

The Museum will preserve, to the best of its ability, each artifact placed within its collection. Periodic inspections of the collection will be made in order to judge the preservation and conservation needs of each artifact. The Museum Specialist shall be responsible for monitoring and adequately maintaining all collections storage and

exhibition areas. Such efforts shall be documented through a variety of means including environmental records, inventories, photographs, and storage check-out logs.

The Museum Specialist shall determine, either through routine monitoring, exhibit production, or accidental damage, which objects may need professional conservation treatment and inform the supervisor. Objects in need of treatment shall be assessed and an appropriate time for conservation determined, considering a combination of need, budgetary allowances, and the availability of a qualified conservator. All treatments shall be properly documented and treatment records maintained by Museum staff.

### **Inventory**

The A. W. Perry Homestead Museum will conduct a full inventory of its collections every five years. Inventory is an on-going process, and accurate records of the artifact location, condition, and preservation needs are constantly being updated.

A comprehensive inventory of the Education Collection shall be undertaken bi-annually, along with a condition inspection. Any object that has deteriorated or has been damaged beyond usefulness shall be disposed of. Additional guidelines regarding the management of the Education Collection are detailed in the Education Collection and Prop Materials Manual.

### **Access to and use of collections**

The Museum welcomes study of its collections by qualified individuals for research and other generally beneficial purposes, considering the following conditions:

1. Museum staff shall receive a written request to study a collection at least two weeks (10 working days) prior to the time the collection is to be studied. The request shall outline the goals and methods of the research and include the credentials of the researcher. The Museum Specialist shall determine whether access to the collections shall be granted and shall inform the researcher in writing.
2. Research space shall be made available.
3. The researcher shall agree to meet all conditions deemed necessary for the protection of collection materials.
4. Copying and photography costs shall be borne by the researcher.
5. The researcher shall give the Museum copies of papers or publications which result from the study of its collections.
6. The Museum Specialist may waive any of the above conditions if it is in the best interest of the Museum to do so.

## **VII. OBJECTS IN CUSTODY**

Objects temporarily deposited with the Museum for whatever purpose shall be subject to all conditions specified on the “Temporary Custody Form”. A staff member shall sign the Receipt on behalf of the Museum. Additional guidelines regarding objects placed in the custody of the Museum are detailed in the section for Incoming Donations.

## **VIII. INSURANCE AND RISK MANAGEMENT**

The objects in the Permanent Collection shall be adequately covered by insurance. For purposes of valuation, the curator of collections shall seek comparable valuations from local, regional, and national sources and may, if warranted, seek the assistance of a qualified appraiser. Valuations shall be updated as need, time, and budget allow. The Museum Specialist shall be responsible for monitoring insurance coverage. All proceeds from insurance payments resulting from claims due to damaged or lost collections shall go only to the acquisition of new collections or for the direct care of existing collections.

## **IX. COPYRIGHT AND REPRODUCTION**

In policy and in practice, the Museum shall follow U.S. copyright law incorporated in Title 17 of the U.S. Code, as well as all subsequent legislation pertaining to copyright and other issues of intellectual property. Additional guidelines regarding copyright and reproduction issues are detailed in the Copyright Guidelines manual and the Policy on Images.

## **X. LEGAL AND ETHICAL CONSIDERATIONS**

Board members, managers, Museum staff and volunteers adhere to the attached American Alliance of Museum’s Code of Ethics for Museums.

## **XI. COLLECTIONS POLICY REVISIONS AND AMENDMENTS**

The policy shall be reviewed at least every five years by the Museum Specialist and the Museum Board. Revision and amendments shall be made at any time by approval the Museum Board.

# Code of Ethics for Museums

Adopted 1991, amended 2000.

Please note that the Code of Ethics for Museums references the American Association of Museums (AAM), now called the American Alliance of Museums.

Ethical codes evolve in response to changing conditions, values and ideas. A professional code of ethics must, therefore, be periodically updated. It must also rest upon widely shared values. Although the operating environment of museums grows more complex each year, the root value for museums, the tie that connects all of us together despite our diversity, is the commitment to serving people, both present and future generations. This value guided the creation of and remains the most fundamental principle in the following Code of Ethics for Museums.

## Code of Ethics for Museums

Museums make their unique contribution to the public by collecting, preserving and interpreting the things of this world. Historically, they have owned and used natural objects, living and nonliving, and all manner of human artifacts to advance knowledge and nourish the human spirit. Today, the range of their special interests reflects the scope of human vision. Their missions include collecting and preserving, as well as exhibiting and educating with materials not only owned but also borrowed and fabricated for these ends. Their numbers include both governmental and private museums of anthropology, art history and natural history, aquariums, arboreta, art centers, botanical gardens, children's museums, historic sites, nature centers, planetariums, science and technology centers, and zoos. The museum universe in the United States includes both collecting and non-collecting institutions. Although diverse in their missions, they have in common their nonprofit form of organization and a commitment of service to the public. Their collections and/or the objects they borrow or fabricate are the basis for research, exhibits, and programs that invite public participation.

Taken as a whole, museum collections and exhibition materials represent the world's natural and cultural common wealth. As stewards of that wealth, museums are compelled to advance an understanding of all natural forms and of the human experience. It is incumbent on museums to be resources for humankind and in all their activities to foster an informed appreciation of the rich and diverse world we have inherited. It is also incumbent upon them to preserve that inheritance for posterity.

Museums in the United States are grounded in the tradition of public service. They are organized as public trusts, holding their collections and information as a benefit for those they were established to serve. Members of their governing authority, employees and volunteers are committed to the interests of these beneficiaries. The law provides the basic framework for museum operations. As nonprofit institutions, museums comply with applicable local, state, and federal laws and international conventions, as well as with the specific legal standards governing trust responsibilities. This Code of Ethics for Museums takes that compliance as given. But legal standards are a minimum. Museums and those responsible for them must do more than avoid legal liability, they must take affirmative steps to maintain their integrity so as to warrant public confidence. They must act not only legally but also ethically. This Code of Ethics for Museums, therefore, outlines ethical standards that frequently exceed legal minimums.

Loyalty to the mission of the museum and to the public it serves is the essence of museum work, whether volunteer or paid. Where conflicts of interest arise—actual, potential or perceived—the duty of loyalty must never be compromised. No individual may use his or her position in a museum for personal gain or to benefit another at the expense of the museum, its mission, its reputation and the society it serves.

For museums, public service is paramount. To affirm that ethic and to elaborate its application to their governance, collections and programs, the American Association of Museums promulgates this Code of Ethics for Museums. In subscribing to this code, museums assume responsibility for the actions of members of their governing authority, employees and volunteers in the performance of museum-related duties. Museums, thereby, affirm their chartered purpose, ensure the prudent application of their resources, enhance their effectiveness and maintain public confidence. This collective endeavor strengthens museum work and the contributions of museums to society—present and future.

## Governance

Museum governance in its various forms is a public trust responsible for the institution's service to society. The governing authority protects and enhances the museum's collections and programs and its physical, human and financial resources. It ensures that all these resources support the museum's mission, respond to the pluralism of society and respect the diversity of the natural and cultural common wealth.

Thus, the governing authority ensures that:

- all those who work for or on behalf of a museum understand and support its mission and public trust responsibilities
- its members understand and fulfill their trusteeship and act corporately, not as individuals
- the museum's collections and programs and its physical, human and financial resources are protected, maintained and developed in support of the museum's mission
- it is responsive to and represents the interests of society
- it maintains the relationship with staff in which shared roles are recognized and separate responsibilities respected
- working relationships among trustees, employees and volunteers are based on equity and mutual respect
- professional standards and practices inform and guide museum operations
- policies are articulated and prudent oversight is practiced
- governance promotes the public good rather than individual financial gain.

## Collections

The distinctive character of museum ethics derives from the ownership, care and use of objects, specimens, and living collections representing the world's natural and cultural common wealth. This stewardship of collections entails the highest public trust and carries with it the presumption of rightful ownership, permanence, care, documentation, accessibility and responsible disposal.

Thus, the museum ensures that:

- collections in its custody support its mission and public trust responsibilities
- collections in its custody are lawfully held, protected, secure, unencumbered, cared for and preserved
- collections in its custody are accounted for and documented
- access to the collections and related information is permitted and regulated
- acquisition, disposal, and loan activities are conducted in a manner that respects the protection and preservation of natural and cultural resources and discourages illicit trade in such materials
- acquisition, disposal, and loan activities conform to its mission and public trust responsibilities
- disposal of collections through sale, trade or research activities is solely for the advancement of the museum's mission. Proceeds from the sale of nonliving collections are to be used consistent with the established standards of the museum's discipline, but in no event shall they be used for anything other than acquisition or direct care of collections.
- the unique and special nature of human remains and funerary and sacred objects is recognized as the basis of all decisions concerning such collections
- collections-related activities promote the public good rather than individual financial gain
- competing claims of ownership that may be asserted in connection with objects in its custody should be handled openly, seriously, responsively and with respect for the dignity of all parties involved.

## Programs

Museums serve society by advancing an understanding and appreciation of the natural and cultural common wealth through exhibitions, research, scholarship, publications and educational activities. These programs further the museum's mission and are responsive to the concerns, interests and needs of society.

Thus, the museum ensures that:

- programs support its mission and public trust responsibilities
- programs are founded on scholarship and marked by intellectual integrity
- programs are accessible and encourage participation of the widest possible audience consistent with its mission and resources
- programs respect pluralistic values, traditions and concerns
- revenue-producing activities and activities that involve relationships with external entities are compatible with the museum's mission and support its public trust responsibilities
- programs promote the public good rather than individual financial gain.

## Promulgation

This Code of Ethics for Museums was adopted by the Board of Directors of the American Association of Museums on November 12, 1993. The AAM Board of Directors recommends that each nonprofit museum member of the American Association of Museums adopt and promulgate its separate code of ethics, applying the Code of Ethics for Museums to its own institutional setting.

A Committee on Ethics, nominated by the president of the AAM and confirmed by the Board of Directors, will be charged with two responsibilities:

- establishing programs of information, education and assistance to guide museums in developing their own codes of ethics
- reviewing the Code of Ethics for Museums and periodically recommending refinements and revisions to the Board of Directors.

## Afterword

Each nonprofit museum member of the American Association of Museums should subscribe to the AAM Code of Ethics for Museums. Subsequently, these museums should set about framing their own institutional codes of ethics, which should be in conformance with the AAM code and should expand on it through the elaboration of specific practices. This recommendation is made to these member institutions in the belief that engaging the governing authority, staff and volunteers in applying the AAM code to institutional settings will stimulate the development and maintenance of sound policies and procedures necessary to understanding and ensuring ethical behavior by institutions and by all who work for them or on their behalf.

The Code of Ethics for Museums serves the interests of museums, their constituencies, and society. The primary goal of AAM is to encourage institutions to regulate the ethical behavior of members of their governing authority, employees and volunteers. Formal adoption of an institutional code promotes higher and more consistent ethical standards.