

## The Evolution of Core Values Through Institutional Self-Examination

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### **Introduction**

Eight years ago the American museologist and essayist Stephen E. Weil addressed the INTERCOM group with a call for a look at organization-wide quality and the suggestion that our institutions should be held accountable for their overall purposiveness, capability, effectiveness and efficiency. A program of the American Association of Museums has been evolving towards that state for three decades, and provides today a case study *a propos* of the conference theme, **Leadership in Museums: Are our Core Values Shifting?**

A review of the histories of individual museums and their voluntary associations shows that core purposes and values of U.S. museums have been evolving for over a century in response to internal and external pressures and also in response to opportunities for expanded societal roles, competitive advantage with peer institutions, or simple good fortune. Whether an institution was founded as the result of collections amassed in the past, chartered by a government obligation or custom, or because of the passion of a group for an idea, each has then been shaped by its location, size, governance, staff, audience, and funding sources. While maintaining individual emphases ranging from connoisseurship and university teaching, to achievement of educational goals, to preservation of community memory, to economic development schemes and compliance with local, state and federal regulations, museums have maintained their prime interests in collecting and preservation. In the U.S., shifts in core values have tended to be additive and cumulative while respecting the variety and diversity of individual missions.

Today, the majority of American museums are non-governmental organizations, governed by boards of trustees, incorporated within their states of residence and operation, and given exemption from payment of federal taxes upon successful application to the Internal Revenue Service. There is also a large and high profile sector of organizations supported at least in part by municipal, state or federal entities with a variety of governance modes. And, in response to complicated joint ventures between communities and governments there is an emerging class of quasi-nongovernmental organizations, or *quangos*. The latest statistics released by the AAM estimate that there are now 15,000 museums in the US (one for each 16,500 citizens), 75% of them small and 43% in rural areas. Many of these have been organized since the 1950's and the pace continues unabated with new openings announced on what seems to be a weekly basis.

One might ask how this encyclopedic assortment can agree on a commonality of core values. The answer, I believe, is found in the emergence of institutional accreditation programs, which require self-examination versus evolving professional standards. The resulting self-awareness allows each institution to balance the conflicting demands of today within the context of its own mission and life cycle, while planning for the future.

## **Museum Advancement and Excellence**

Since 1970, the American Association of Museums has identified, set and promoted standards and best practices through its Accreditation Program. Created as a response to calls for self-regulation and greater recognition of museums as quality organizations by potential funders, the Accreditation Program was founded on basic principles, which included 1.) the notion that organizations, not individuals, are accreditable; 2.) that the process is an opportunity for the museum to undertake a rigorous self-examination; 3.) that accreditation proceeds from the informed judgment of experienced individuals based upon information supplied by the applicant institution; and 4.) that accreditation certifies that a museum is currently meeting accepted standards established by the profession. The process was and is voluntary and confidential, and the principles apply equally to all museums. The Accreditation Commission, made up of eight members appointed by the AAM Board of Directors, makes final decisions after reviewing Visiting Committee reports. The addition of the Museum Assessment, Peer Review, Publication and Information Center programs in the 1980's and 1990's in support of accreditation created a suite now known collectively as the Museum Advancement and Excellence Program.

The criteria for institutional accreditation have further evolved, as have the Accreditation Commission's guidelines and expectations for fulfilling specific aspects of those criteria. As the first institutions went through the process, it was somewhat impressionistic. By the late 1970's there had evolved an imposing checklist of attributes, which were thought to be possessed by accreditable institutions, and by the late 1980's the current format was evolved, which evaluates information relating to the general characteristics of an accreditable museum against two core questions: 1.) How well does the museum achieve its stated mission and goals?; and, 2.) How well does the museum's performance meet standards and best practices as they are generally understood in the museum field?

With an iterative process that incorporates multiple perspectives, embraces the uniqueness of individual museums, and reflects the evolving nature of information that guides museum performance and accountability, the program has both promoted and mirrored changes in traditional museum values and practices. Drawing on AAM initiatives such as *Museums for a New Century*, *Excellence and Equity*, and the new *Museums and Community* project, as well as changes in the form of AAM governance including the Board of Directors, Regional Councils, Standing Professional Committees, Professional Interest Committees, the Peer Reviewer pool, and the Accreditation Commission itself, the Museum Advancement and Excellence Program has led the way in "raising the bar" for museum standards. Working in conjunction with the Institute of Library and Museum Services, the Museum Assessment Program was created to address the needs of institutions seeking to prepare for formal accreditation by focusing on particular operational areas including a general survey, collections issues, the public dimension, and now the newest MAP survey, governance. The Information Center collects and shares documentation of the best practices from American museums as suggested by Peer Reviewers and the Accreditation Commission. The Publication Program highlights the latest published criteria for accreditation through periodicals such as *NewStandard* and updated manuals for applicant institutions and peer reviewers.

## Evolution of Standards

In the past decade, major shifts have been made in the way that American museums state their missions, define their purposes and audiences, declare their ethical positions, accept responsibility for accountability and transparency in their business affairs, and acknowledge the different learning styles of audiences as they seek to serve their communities. Changes in the characteristics of accreditable museums, requirements for institutionally approved codes of ethics and evidence of ongoing planning processes, more emphasis on the educational goals for a variety of audiences, accountability for matching sources and uses of financial resources, and an emphasis on service to communities have been added, while standards for collections care, research and interpretation have not been diminished, but rise ever-higher.

During the 1990's hundreds of institutions first accredited in the 1970's and 1980's came back for the second or even third time (accreditation is generally good for a ten year period) to find that the standards had evolved and that they had not, with over 100 tabled in 1996-2000 alone, for periods up to a year. As a result, the Accreditation Commission has issued a number of Expectations regarding aspects of the process in order to facilitate preparedness by institutions during the time in which their status is in effect, with care taken not to make them too prescriptive. Since 1999, Expectations for Planning, Mission, Ethics, Delegation of Authority to Directors, Resolutions of Permanence (primarily for museums that are part of a larger parent organization), and Collections Stewardship have been developed by AAM staff, given thoughtful consideration and approval by the Commission, and then disseminated to all accredited museums. Expectations for Interpretation and/or Evaluation will most likely be the next issued.

As standards evolved, museum audiences grew by 50% to 865M (more than to all sporting events combined) and billions of dollars were spent on museum infrastructure and programs. A survey completed in February 2001 revealed that "in a time of enormous cynicism about public institutions, the broadest range of Americans view museums as one of the most important resources for educating our children and as one of the most trustworthy sources of objective information." This public trust is based on three perceived museum themes: they present history, they are research-oriented, and they deal in facts. And, after the events of one year ago, U.S. museums have also claimed a major role as sanctuary and healing environment as well.

This surge in both popularity and perceived trustworthiness is attributable in part to the way that American institutions have embraced their expanded roles for education and public service, while maintaining their roles as collectors and researchers. The growth of visitor studies and evaluation processes has complemented increased marketing efforts to provide for superior visitor experiences. And, the quality of exhibits, public programs, and publications has risen in museums as scholars have accepted the challenge of serving audiences beyond their peers, with encouragement from institutions of higher learning and the support of the National Science Foundation's Informal Science Education program, the Museum Program of the National Endowment for the Humanities, and the leadership initiatives of the Institute for Museum and Library Services, among others.

## **Higher Expectations and Growing Self-Awareness**

While well over a hundred institutions were tabled in the late 1990's and early 2000's, primarily to address Planning (26%), Governance (23%), or Collections Stewardship (22%), their collective response to the evolution of standards has been overwhelmingly positive. Key aspects of this response have been increased institutional reflection, self-study and self-awareness and the parallel growth of professionalism and openness among governing bodies, executives, staff, volunteers and other constituencies. Tabling decisions are reported back as a significant opportunity for candid, forward-looking conversations about the futures of the institutions involved.

The results are individual, but the overall outcome is advancement of industry-wide effectiveness and the continued "raising of the bar" for standards. Recent final decisions on tabling actions have congratulated museums on "successful work on governance," "the impressive manner in which staff, volunteers, and board worked hand in hand towards meeting standards," "your swift and serious efforts," "the significant strides you have made", and "the comprehensive and candid nature of your final report."

As ever, most accredited institutions report that the occasion is a cause for celebration by board, staff and membership, and a time of increased respect and involvement by communities, audiences and funders. And, they say, the process was key in their success.

To date, just over 750 museums have been granted full accreditation by the AAM, and hundreds more have participated in the MAP program. The potential universe for creditable museums is unknown, but clearly growing. The interest of institutions and individuals in standards and best practices is also growing, as reflected in the rapid increase in publications and professional educational programs sought out by those hungry for discussion and learning. And, in a healthy debate, not every institution agrees that it has to become everything to everyone, for example those whose mission is best described as teaching or connoisseurship within a university setting or small community of interest, versus those chartered as regional or community resources.

## **Conclusion**

The evolution of standards and practices cannot in itself provide for excellence in individual museum programs, overcome external pressures such as increased governmental regulation or taxation of non-profits, or internal pressures serving individual agendas of board or staff members. It is each institution's active participation in periodic self-examination, and the resulting actions taken, that propel the field forward in the positive evolution of its values in service to society.

## References

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### **Websites**

[www.aam-us.org](http://www.aam-us.org) gives access to many of the documents and publications to which I have referred, as well as links to additional websites of importance. More particularly, [www.aam-us.org/programs/accreditation/accred.cfm](http://www.aam-us.org/programs/accreditation/accred.cfm) gives access to the documents,

policies, and expectations of the Accreditation Program as well as the current list of accredited institutions.

[www.aaslh.org](http://www.aaslh.org) gives access to information and services pertinent to the majority of American museums, which are history-based.

[www.guidestar.org](http://www.guidestar.org) holds the financial statements and federal tax filings of 875,000 American non-profits, including museums and private foundations.

[www.imls.gov](http://www.imls.gov) presents the latest in the efforts of one government agency to encourage and support the concept of museums and libraries as central places for 21<sup>st</sup> century learning by people of all ages.

[www.mcn.edu](http://www.mcn.edu) gives access to over 1,000 museum websites worldwide, for comparative purposes.

[www.neh.gov](http://www.neh.gov) gives access to information on the Museum Program and other humanities offerings.

[www.nsf.gov](http://www.nsf.gov) gives access to information on the Informal Science Education program.

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