

Accreditation Commission Report on:

Museum Systems and the AAM Accreditation Program

Issued February 2001; Revised February 2005

TERMINOLOGY

For the purposes of Accreditation:

Definition of a Museum System: A Museum System is a museum operation that has a complex organizational structure and/or facilities* in more than one location. Depending on the organizational structure and size of the museum system, it may pursue accreditation as one entity or as multiple entities.

(*see Museum Systems Components below)

Definition of a Single-Site Museum: A single museum, existing in one location, with no *associated, branch* or *satellite* operations other than off-site storage or administrative office space. This type of museum is not part of any museum system. A single-site museum pursues accreditation independent of any other museum.

Note: According to a 1999 survey by the Accreditation program, approximately 75% of museums that pursue accreditation are Single-Site Museums (based on working definitions disseminated in February 1999).

MUSEUM SYSTEMS

Museum Systems, like living organisms, are constantly changing—growing, reorganizing, and shedding and adding parts. The configuration of any one Museum System may evolve and change at different points in time. Also, like snowflakes, no two Museum Systems are the same. Each Museum System has a unique configuration. Recognizing this, the Accreditation Program has done extensive research to develop accreditation guidelines that are flexible but also provide an overarching framework to ensure that museums are treated fairly and consistently in the pursuit of accreditation. To-date research into Museum Systems has resulted in the following:

- 1) **Proposed organizational structures/models that generally reflect Museum Systems.** These models are defined below and visually represented by Organizational Models A & B (Attachments 1 & 2). These models are intended to serve as a framework to guide Museum Systems regarding an approach to accreditation.

- 2) **Definitions of different components (i.e. different units) that may comprise a Museum System.** Each component is defined below. Note that a Museum System may not have all the components defined below and multiples of the same type of component can exist in a museum system.

The Museum System components and organizational models are described in detail below.

Museum System Components

The Museum System Components identified and defined below are based on the study of real Museum Systems. Since each Museum System is different, each Component may have different characteristics. The definitions are designed to facilitate the accreditation process and are intended as a guideline or framework for further consultation about accreditation for Museum Systems. Within this framework Museum Systems have options and are free to decide which component definitions best represent their operations. Museum Systems should seek assistance with these choices from the Accreditation staff. Our experience suggests that components of one Museum System may change or evolve over time. For example, what was once a Satellite may turn into a Branch Facility/Museum over time. Therefore, Museum Systems are encouraged to reevaluate the component definitions at the time of each accreditation review. Museum Systems are also encouraged to reevaluate and select the organizational model that best suits their operations as well.

Definitions of Museum System Components:

- **Associated Museum:** A museum that is in effect *autonomous* and independently meets the definition of a museum and eligibility criteria for accreditation (see Appendix), but is part of a larger museum system. This type of museum is treated as an individual entity by the Accreditation Commission and only exists in Museum System Organizational Model A. See Attachment 1 and explanation below.
- **Branch Museum/Facility:** A museum/facility that essentially meets the definition of a museum (see Appendix), and is part of a larger, holistically or highly *integrated* museum system. This type of facility is reviewed in the context of a Museum System and exists mostly in Museum System Organizational Model B. See Attachment 2 and explanation below.
- **Centralized Services:** Consolidated functions or services made available to all aspects of the museum system. This may include collection storage, facilities operations, financial management, human resources, development, conservation, exhibit design/fabrication, security, administrative support, purchasing, public relations, legal counsel, membership, marketing, etc. These services may be operated out of one museum, a separate facility leased or owned specifically for that purpose, or different locations/departments within the museum system; centralized services are not necessarily discrete. These functions and services are reviewed within the context of any museum system accreditation review.
- **Headquarters Museum:** The flagship museum of a Museum System, which meets the definition of a museum and eligibility criteria for accreditation (see Appendix). As

appropriate, an applicant institution may opt to have the review apply to the Headquarters Museum only (as if it were a single-site museum), independent of the rest of the Museum System. However this choice should be made in consultation with the Accreditation Program staff. Subsequent accreditation reviews for this type of museum component may encompass the entire Museum System. Headquarters museums exist in Organizational Model B only.

- **Satellite Facility:** A Satellite Facility is a component of a Museum System that serves one or more museum functions. It is in a separate location from other museum components (i.e., it is not housed within another museum component). It is small (relative to the system) and has limited or no staffing. It is not self-sustaining and is dependent on the Museum System for services such as management, staffing, financial support, or collections. It is open to the public on a regular basis or by appointment. Satellite Facilities can exist in both Organizational Models A and B.
- **Undeveloped Assets:** Properties (structures or land), owned, or in the custody of a museum system but for various reasons are not in use for any current mission-related museum function. These sites are not interpreted and not open to the public. Undeveloped Assets can exist in both Organizational Models A and B.

Museum System Configurations

The Museum System configurations identified and defined below are based on the study of real Museum Systems. They describe two fundamentally different models of Museum Systems. These models are highly theoretical frameworks designed to facilitate the accreditation process. Museum Systems are free to elect which model best suits them and are encouraged to seek assistance with this choice from the Accreditation staff. It is acknowledged that Museum Systems are organic entities and change frequently. Therefore, just as Museum Systems are encouraged to reevaluate the component definitions at the time of each accreditation review, Museum Systems are also encouraged to reevaluate and select the model that best suits their operations as well at the time of each accreditation review. Note that these changes will affect the scope and approach of an accreditation review. Please see the attached Organizational Models A and B (Attachments 1 and 2) for a visual representation of the two models.

Organizational Model A: As a museum system grows, it may develop sub-units which are almost autonomous, in this model these are called Associated Museums. Very large Museum Systems may sometimes encounter challenges operating as one integrated unit, and it is natural that different parts of the system may be *somewhat autonomous*. However, the Associated Museum is never totally autonomous because it will always be under the aegis of the overarching Museum System for its governance and funding, for example. These functions and services may be classified as Centralized Services provided system-wide by the parent organization. Attachment 1 represents Organization Model A visually.

Organizational Model B: Some Museum Systems are characterized as *holistically or highly integrated* units. For example, a Headquarters Museum and/or one or more Branch Museums supported by various Centralized Services existing as an intimately integrated system. It is

difficult to separately review the components of these Museum Systems because each component is inextricably related to the others. Attachment 2 visually represents Organization Model B. The Accreditation Program may recommend that these Museum Systems seek accreditation for the entire Museum System. However, for Museum Systems new to the Accreditation Program, this task may be too overwhelming. Therefore, a Museum System that fits into Model B, when it applies may apply for accreditation for its Headquarters Museum (as if it were a single-site museum). Subsequent accreditation reviews may encompass more or all of the components of the Museum System.

Program Policies

Approach:

The review of a Museum System is more than a review of its individual parts. The review encompasses all aspects of the System to identify strengths and weaknesses, and their root causes. Strategic planning, resource allocation, and relationships between the parts and the whole are key elements in the review of a Museum System.

The Accreditation Commission has determined that a Museum System cannot omit sites from a review because they may have weaknesses. However, accreditation for certain sites may be delayed or on a separate time schedule in accordance with the frameworks outlined in Model A and Model B. Model A permits Associated Museums with their sub-units to pursue independent accreditation on independent time tables. Model B permits a Headquarters Museum to apply for independent accreditation for the institution's initial review only. Subsequent pursuit of accreditation for a Museum System under Model B must generally include all components of the Museum System. The Commission's philosophy on the approach is articulated as follows:

- It should evaluate a museum system as a whole to understand the full picture of the entire museum operation.
- The approach should remain flexible and the final determination made by the accreditation staff and Commission will ensure that the accreditation review is equitable and comprehensive.
- A museum system may not omit sites from a review because it does not want the Commission to review a "weak" site.
- No system can be entirely perfect and at any given time, a particular site/part of a system could be less than ideal, but that if the site and system understands, acknowledges and has plans to address areas of weakness, the system can remain eligible for accreditation.

The Accreditation Commission is interested in determining an institution's awareness and recognition of problem areas and that a museum/System has plans and processes in place to address such areas at some future point in time. At the time of the next accreditation review, the Commission would expect to see significant progress in such areas, per the plans presented by the System during the previous review.

At the beginning of an accreditation review, a Museum System can determine how its sites are classified, based on the official program definitions. However, this determination is considered

by the Accreditation Program staff and Accreditation Commission and, because of the complexity of museum systems, may be subject to change (in consultation with the System).

The Self-Study

All components of a Museum System must present some form of written documentation. This takes the form of one or more Self-Study Questionnaires. Program staff will work with the system to figure out the best way to present the information. The objective is to collect appropriate information from each site in a way that the reader can best understand the unique function of the site, its role/position within the System, and its relationship with the headquarters/centralized services and the other sites in advancing the organization's mission.

The Site Visit

The Commission recognizes that an on-site visit to a large, possibly geographically extensive, Museum System is logistically complex, costly, and time consuming for the Visiting Committee and the Museum System staff involved. Therefore, the Commission has determined the following guidelines for on-site visits (in both initial and subsequent reviews) for Museum Systems:

- The Headquarters Museum, or central administration if there is no Headquarters Museum, and all facilities providing centralized services must be included as part of the site visit.
- If a Museum System has *seven or fewer* Branch Museums/Facilities and they are located in relative proximity, all will be visited physically by the Visiting Committee.
- If the Museum System has *more than seven* Branch Museums/Facilities, a sampling of the Branch Museums/Facilities will be visited physically by the Visiting Committee. The Accreditation Program staff and the Accreditation Commission will determine which sites receive a visit and will notify the System in advance.
- It is at the discretion of the Accreditation Program staff and the Accreditation Commission whether site visits to Satellite Facilities and Undeveloped Assets will occur.
- For any sites not visited, the System may be asked to visually document the site for the Visiting Committee through videotape, additional photos, or other mechanism (e.g., Webcam, Web site, etc.). Also, staff from sites that do not receive a visit may be asked to convene and meet with the Visiting Committee at a centralized location. The Visiting Committee may also interview them over the phone.
- If a new Branch Museum/Facility has been added to the System since the time of the last review, it will be visited physically.
- The maximum size of a single Visiting Committee team is three individuals; the team may divide up to conduct the visit if necessary; a site may be reviewed by only one team member.
- A system can have multiple Visiting Committee teams if needed and the visit can occur over a non-continuous period of time (but in a limited time frame).
- For very complex visits, an Accreditation Commissioner or program staff member may be appointed liaison and/or logistics coordinator for the visit to allow the Visiting Committee to focus on reviewing the Self-Study materials, preparing for the trip, and writing the narrative report.

Appendix: Eligibility Criteria for Participating in the Accreditation Process

To participate in the American Association of Museums' Accreditation Program, a museum must:

- be a legally organized nonprofit institution or part of a nonprofit organization or government entity
- be essentially educational in nature
- have a formally stated and approved mission
- use and interpret objects and/or a site for the public presentation of regularly scheduled programs and exhibits
- have a formal and appropriate program of documentation, care, and use of collections and/or objects
- carry out the above functions primarily at a physical facility/site
- have been open to the public for at least two years
- be open to the public at least 1,000 hours a year
- have accessioned 80 percent of its permanent collection
- have at least one paid professional staff with museum knowledge and experience
- have a full-time director to whom authority is delegated for day-to-day operations
- have the financial resources sufficient to operate effectively
- demonstrate it meets the Characteristics of an Accreditable Museum