

# HISTORICAL MUSEUM AT FORT MISSOULA

## CODE OF ETHICS

“Museums hold their possessions in trust for mankind and for the future welfare of the [human] race. Their value is in direct proportion to the service they render the emotional and intellectual life of the people.” (AAM Code of Ethics for Museum Workers, 1925)

### Mission Statement

*The mission of the Historical Museum at Fort Missoula is to keep Missoula County’s history alive for the education and enjoyment of the public.*

### Vision Statement

*The Historical Museum at Fort Missoula is dedicated to increasing the knowledge and understanding of the history of the county and city of Missoula, the history of Fort Missoula and the military presence in the area, and the history of forest management and the wood products industry in western Montana. Through an aggressive program of collections, exhibits, educational opportunities and special events, the Museum seeks to stimulate creative thought and enhance the self-esteem of residents of and visitors to Missoula, providing a sense of place, time and space for all.*

*To that end, insofar as its resources permit, the Museum collects, preserves and interprets objects and informational materials related to the exploration, founding and evolution of the community and county of Missoula, the development of Fort Missoula and the myriad aspects of the military presence in the area, and of the history of forest management and the wood products industry. The Museum collects, preserves and interprets objects from the period of the earliest exploration to the present in order to present a coherent and total picture. These objects and informational materials are made available for study and enjoyment of all, in a pleasant, secure, safe and accessible setting.*

Because museums are repositories of the public trust, ethics codes are critical and beneficial to the maintenance of a museum's integrity in its community and the furtherance of its stated mission. The following code of ethics states the Historical Museum at Fort Missoula's policies and procedures for obtaining the greatest human good by adapting general ethics to the particulars of this Museum's purpose. This code proceeds from the mission statement and uses it as a gyroscope by expressing the Museum's policy on those sorts of actions that are and are not consistent with the human good the Museum seeks to serve as affirmed in the mission statement.

## GOVERNANCE

The primary responsibility for governance, institutional policies, financial stability, and legal accountability of the Historical Museum at Fort Missoula rests with the County of Missoula, as expressed by the appointed Board of Trustees. Operational responsibility rests with the staff.

Museum governance is a public trust responsible for the institution's service to society. The governing authority protects and enhances the museum's collections and programs, together with 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 worlds.

Therefore:

-The Missoula County Board of Trustees for Museums formally adopted the American Association of Museums code of ethics on November 18, 1993.

-Trustees must be unequivocally loyal to the purposes of the Historical Museum at Fort Missoula. Each trustee must devote time and attention to the affairs of the institution and ensure that the Historical Museum and the Board of Trustees act in accordance with the basic documents and with applicable county, state, and federal laws.

-Trustees are responsible for the overall governance of the Historical Museum. General operational responsibility rests with the staff. Trustees are not to occupy themselves with micro-management responsibilities.

-Trustees shall not attempt to act in their individual capacities.

-Trustees shall maintain in confidence information learned during the course of their museum activities when that information concerns the administration or activities of the museum and is not generally available to the public.

-The Board of Trustees holds the ultimate fiduciary responsibility for the Historical Museum and for the protection and nurturing of its various assets: the collections and related documentation, the plant, financial assets, and staff. It is obliged to develop and define the purposes and related policies of the institution, and to ensure that all of the museum's assets are properly and effectively used for public purposes.

-A critical responsibility of the Board of Trustees derives from its relationship to the director. The selection of that executive and the continuing surveillance of his activities are primarily board responsibilities which cannot be delegated and must be diligently and thoughtfully fulfilled.

-Individual trustees who are experienced and knowledgeable in various fields of endeavor related to Historical Museum activities can be of great assistance to the museum, but conflicts of interest or the appearance of such conflicts may arise because of these interests or activities. Each trustee must endeavor to conduct all of his or her activities, including those relating to persons closely associated with him or her and to business or other organizations, in such a way that no conflict will arise between the other interests and the policies, operations, or interests of the Historical Museum. The appearance of such conflicts also should be avoided.

-Trustees have an obligation to define the rights, powers, and duties of the director. They should work with the director, who is their chief executive officer, in all administrative matters, and deal with him openly and with candor. They should avoid giving directions to, acting on behalf of, communicating directly with, or soliciting administrative information from staff personnel, unless such actions are in accord with established procedure or the director is apprised. Staff members should communicate with trustees through the director or with the director's knowledge, but a procedure shall be provided to allow staff personnel to bring grievances directly to the Missoula County Human Resource Department.

-The director has an obligation to bring before the board any matters involving policy questions not already determined; and to keep them informed on a timely basis about all other significant or substantial matters, or intended actions affecting the institution.

-The director must carry out the policies established by the trustees, and adhere to the budget approved by the board. Whenever it is necessary to deviate from established policies or to alter or

exceed budget guidelines, the director should notify the board in advance and request appropriate approval.

- Trustees and employees must refrain from any private or public activity which might be in conflict with, or appear to be in conflict with, the mission and interests of the Historical Museum.

- At no time should any trustee or staff member knowingly misrepresent the mission, objectives, policies, programs, proceedings or motives of the Historical Museum.

- Neither Trustees nor employees must compete with the Historical Museum in collecting; nor may they take advantage of privileged information obtained as a result of their position to permit others to make use of information otherwise unavailable to the public for furthering personal interest or gain.

- Occasionally, employees may be asked to serve in a professional capacity on boards or commissions. To eliminate conflicts of interest or the appearance of potential for conflicts: such service should be reported in writing to the director; such service is to be performed on the employee's personal time, except as authorized in writing by the director and without compensation.

Employees may serve on boards so long as the activity does not impair the employee's ability to act with total objectivity regarding the Museum's interests or interfere with job performance.

- Employees may not deal in historical artifacts, books, or papers, act on behalf of a dealer, accept outside employment from a dealer or retain interest in a dealership.

- Employees must avoid the appearance of unethical or compromising practice in relationship with suppliers, contractors, and other businesses.

- Due to the potential for conflicts of interest, or the appearance of conflicts of interest, any employee engaged in or considering seeking outside employment for pay, must disclose such employment in writing immediately to the director, who will determine if the outside employment or proposed activity constitutes a conflict of interest.

- All personnel rules are stated in the Missoula County Personnel Handbook.

- All documents and financial records are to be kept in order.

- Written statements of purpose and policies are to be established according to professional standards.

- Commercial support will be accepted only if it does not compromise standards of objective presentation.

- Response to a disaster or an emergency is governed by a formal disaster plan in place for Missoula County, and an emergency plan, adopted by the Board of Trustees.

- Use of the buildings and grounds is to be governed by the "Building and Grounds Use Policy," adopted by the Board of Trustees.

- Individuals employed in the practice of history deserve respect, pay, and benefits commensurate to their training, dedication, and contribution to society. Volunteers deserve the same consideration as their paid colleagues.

## COLLECTIONS

Historical collections, including structures, are the bedrock upon which the practice of history rests. The stewardship of collections entails the highest public trust and carries with it the presumption of rightful ownership, permanence, care, documentation, accessibility, and responsible disposal.

Therefore:

- The institution must weigh carefully the interests of the public for which it holds the

collection in trust, the donor's intent in the broadest sense, the interests of the scholarly and the cultural community, and the institution's own financial well being.

-The Historical Museum must ensure that collections in its custody support its mission and public trust responsibilities and are protected, secure, unencumbered, cared for, and preserved.

-Collections in the Historical Museum's custody must be accounted for and documented, with access to the collections and related information permitted and regulated.

-The Historical Museum must ensure that acquisition, disposal, and loan activities are conducted in a manner that respects the protection and preservation of natural and cultural resources, and which conforms 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, and use of proceeds from the sale of collection materials is restricted to the acquisition of collections.

-Collection-related activities promote the public good rather than individual financial gain.

-No museum employee shall perform appraisals. The exceptions to this principle are appraisals for internal use, or with written permission of the director for other non-profit organizations for similar purposes. Any such appraisal must represent an honest and objective judgment, and must indicate how the judgment was reached.

-The Historical Museum rejects all support, direct or indirect, of illicit trade; and insists on proof of valid title.

-Full, written records will be kept on all objects.

-Objects exhibited or loaned must be protected against theft and damage in transit or handling. Insurance coverage, when pertinent, must be adequate.

-Complete and detailed policies and procedures are covered in the "Collections Policy and Procedures Manual," approved by the Board of Trustees.

## PROGRAMS

The Historical Museum at Fort Missoula serves the public by advancing an understanding and appreciation of our shared cultural heritage. Exhibitions, scholarship, publications, and educational programs, public events and other activities must further advance the institution's mission and be responsive to the concerns, interests, and needs of area residents.

Therefore:

-The Historical Museum follows the American Association of Museums' guidelines for educational policy as stated in Excellence and Equity: Education and the Public Dimension of Museums (1991).

-The educational mission of the Historical Museum is to increase the knowledge and understanding by people of the history of the county and city of Missoula, the history of Fort Missoula and the military presence in the area, and the history of forestry management and the timber industry in Western Montana; as adopted by the Board of Trustees.

-Exhibits at the Historical Museum are governed by an "Exhibit Policy," adopted by the Board of Trustees.

-The Historical Museum maintains a non-circulating research library in its fields of collection and interpretation. This library is open to all scholars during normal working hours. Research in the collections is also possible, with pre-approval by the curator. A "Research Assistance Policy," adopted by the Board of Trustees, delineates specific policies.

-Programs remain responsive to the interests and concerns of the greater Missoula area.

-Programs are intellectually responsible, founded on scholarship, and consistent with current knowledge.

-Programs are accessible and encourage participation of the widest possible audience consistent with our mission and resources.

-Programs respect the cultural diversity of the region, pluralistic values, traditions, and concerns.

-Revenue-producing activities and those that involve relationships with outside organizations are compatible with the mission of the Historical Museum and support its public trust responsibilities.

-Programs promote the public good rather than individual financial gain.

## VOLUNTEERS

Volunteers can be broadly defined as those who work in some way to help others for no monetary reward. For local historical organizations, such as the Historical Museum at Fort Missoula, volunteer activity focuses on preserving and interpreting the essential and aesthetic resources that make a neighborhood, city or state a special place to live. Volunteers are our greatest assets, and a well-managed program is essential to attract and retain volunteer support necessary in a climate of decreasing public and private financial resources.

Therefore:

-Volunteers are to be considered and treated as staff, with courtesy and respect at all times.

-Volunteers are expected to abide by the same ethical standards as staff.

-Volunteers are to be managed according to the Board-approved "Volunteer Policy."

-Managing volunteers through a centralized system requires that a single staff member acts as the primary volunteer coordinator and manages every aspect of volunteer involvement from recruitment to assignment.

-The volunteer coordinator finds volunteers and places them in job slots according to their interest and the Museum's needs.

-All staff, volunteers and board members are encouraged to help recruit volunteers for any position within the Museum.

-Recruitment of volunteers should be done in the same way as for paid staff. Volunteer application forms must provide sufficient information for the applicant to determine his/her level of interest, information regarding availability and area of interest, and enough information about the prospective volunteer so staff may be able to properly evaluate and assign the volunteer to the right position. It is realized that different people have different strengths and interests and every effort must be made to maximize these; it is also realized that some people may not be appropriate for certain positions depending upon interest, background and experience. We must be as clear as possible in describing the kinds of skills required, the time commitment involved, the job to be done and any other relevant expectations prospective volunteers should consider before committing themselves to work for the Museum.

-Training of volunteers is a long-term proposition beginning with an orientation.

-Orientation must convey to volunteers that they are representatives of the Museum in all their actions and contacts, both internal and external. An overview of the Museum's mission, goals and objectives is essential, and each volunteer is to be presented with a copy of the Volunteer Manual. Policies and procedures, emphasizing those most likely to affect the work of

volunteers, must be reviewed. Training should include how assignments fit in with the total Museum.

-Volunteers need timely information on policy and procedural changes that directly or indirectly affect their work.

-Communication works in both directions. Volunteers should report to an immediate supervisor to let that person know about their progress and problems and the amount of time invested in the project. The supervisor must provide the information necessary to get the job done and be accessible to answer questions and help with problems as they arise.

-Evaluation is an on-going process; written evaluations and a formal evaluation meeting between volunteer and supervisor are very valuable and may be developed by the supervisor and volunteer to insure a process that benefits all.

-The most effective technique for motivating most volunteers is recognizing them. Every opportunity should be taken to acknowledge a volunteer's service

-A volunteer may be mismatched with the job or the Museum, personality conflicts can develop, outside circumstances may prevent the volunteer from fulfilling his obligations or a volunteer may consistently exceed the limits of her authority or misrepresent Museum policy. For these and other reasons, situations do arise where a volunteer is doing more harm than good. It is a difficult and unpleasant task to terminate the Museum's relationship with a volunteer. If supervisory conferences, admonishments and other reasonable and diplomatic efforts to improve the situation fail, the Museum must be honest with the volunteer. We must try to offer options within the Museum or suggest that other organizations might be a better match for his skills. The volunteer may even welcome a chance to exit gracefully.

-The Museum, on the other hand, must be prepared to listen to constructive criticism from a "failed" volunteer, particularly if the program has not been carefully structured and thoughtfully managed.

#### CODE OF ETHICS FOR MISSOULA COUNTY OFFICIALS

As employees or representatives of the County of Missoula, all actions are to be governed by the "Code of Ethics for Missoula County Officials." (attached)

Approved by the Missoula County Board of Trustees for Museums:

March 17, 1994

Reaffirmed, January 11, 1999

Reaffirmed, June 14, 2004

Reaffirmed, February 26, 2007