



CODE OF ETHICS FOR MUSEUMS



SOCIÉTÉ DES MUSÉES
DU QUÉBEC

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TOWARDS AN UPDATED CODE OF ETHICS FOR MUSEUMS

Since the Société des musées québécois (SMQ) published its first edition of the *Guide de déontologie muséale* in 1990, the environment in Québec and around the world has changed. Whether we saw the change as an evolution, metamorphosis, upheaval, or paradigm shift in museum practices, one aspect seemed clear: the *Code of Ethics* of the SMQ was due for an update. Meanwhile, in the fall of 2011, attendees at the États généraux des musées du Québec sent the SMQ a recommendation (Number 17) to review and update its governance structure as well as the *Code of Ethics for Museums*.

A COMBINED ANALYTICAL AND CONSULTATIVE APPROACH

In the spring of 2013, work began on revising the SMQ's governance, culminating with the adoption of new rules and regulations at a special meeting held in October of the same year in Beauport, Québec. It was at this time that the Société des musées québécois name was changed to the Société des musées du Québec, in order to more accurately reflect the territorial scope of its mission. With respect to museum ethics, the fundamentals and structure of the first *Guide* still seemed relevant, so a comparative analysis of various codes of ethics was conducted – including those of the International Council of Museums (ICOM), Canadian Museums Association (CMA), and of the American Alliance of Museums (AAM). This work, conducted by members of the SMQ team with the assistance of a consultant, resulted in a first draft. The draft was submitted for validation to a committee of experts, who made contributions, consisting of additions, clarifications, and constructive criticism. After much discussion, the revised version incorporating all input was adopted by the SMQ's Board of Directors, before finally being submitted for the Annual General Meeting on September 30, 2014, in Sherbrooke.

A COMMON REFERENCE FRAMEWORK

The new version of the *Code of Ethics for Museums* advances a broad vision of museology, which takes into account the various mandates and missions of the museum institutions of Québec, their different types of collections, and multiple varieties of mediation, preservation, and accessibility. The purpose of the *Code of Ethics for Museums* is to lay down foundations for museum ethics that are adapted to the Québec context, and to position these foundations in the support of excellence and promotion of best practices. Since its approach encompasses all museum functions, the *Code of Ethics for Museums* serves as a basis for defining standards and rules appropriate to the specific callings of different museums. Moreover, by adopting such a tool, all Members of the museum network – regardless of their status – will be able to rely on a common frame of reference. This will have beneficial impacts on daily operations as well as on the quality of interactions with various audiences.

In closing, we would like to extend our heartfelt thanks to all the professionals who have contributed to this initiative, for the benefit of present and future generations of museologists, in the development of the SMQ's *Code of Ethics for Museums*, as well as to the Ministère de la Culture et des Communications for its financial support.

Michel Perron
Executive Director

CODE OF ETHICS FOR MUSEUM INSTITUTIONS

The term “museum institution” refers to a non-profit institution operating in Québec, which is open to the public, with a building or space permanently dedicated to the development, research, and interpretation of collections or other types of museum-related content. Museum institutions are places for the dissemination, education, and mediation of art, history, archeology, and science for the benefit of society. These institutions fall into three main categories: museums, exhibition centres, and interpretative sites.

Museums are unique in that they acquire and conserve objects and specimens that are representative of cultural, natural, and scientific heritage, including living collections. Exhibition centres do not generally have collections, and are characterized by the production and dissemination of temporary exhibitions. Interpretative sites concentrate on the preservation and interpretation of a site or theme most often related to history, science, the environment, techniques or ways of life.

In this document, the term “museum institution” refers to an institution in all three of the above categories, as well as to a space for the dissemination of materials from archival centres, libraries, educational institutions, nature parks, and to any other institution having some or all of the characteristics of a museum institution.

1.

MISSION, MANDATE, VALUES

1.1 MISSION

The museum institution:

- 1.1.1** safeguards, studies, interprets, exhibits and develops the movable, immovable, and immaterial heritage, as well as in some cases the natural heritage, biodiversity, and living collections under its care.
- 1.1.2** plays an educational role and develops an awareness amongst various publics regarding the preservation and development of territorial, local, regional, and national identities, and their respective heritages.
- 1.1.3** plays a social role by promoting universal accessibility and the cultural development of communities, stimulating intercultural and intergenerational exchange, and improving the cultural quality of the living environment.
- 1.1.4** fulfills its critical role by ensuring that all of its activities are guided by intellectual integrity, scientific rigour, sound management, sustainable practices, and respect of rights and laws.

1.2 SUSTAINABLE DEVELOPMENT

The museum institution:

- 1.2.1** takes steps to protect, safeguard, and enhance the movable, immovable, and tangible heritage as well as, where appropriate, the natural heritage, biodiversity, and living collections for current and future generations.
- 1.2.2** aims, in its various spheres of activity, to maximize its impact on society, the economy, culture, and tourism, while minimizing its impact on the environment.
- 1.2.3** incorporates the principles of reusing, recycling, and recovery of materials in all spheres of its activities (museography, publications, communications tools, management, etc.).
- 1.2.4** adopts a sustainable development policy, and regularly communicates its actions in this regard.

1.3 ACCESSIBILITY

The museum institution:

- 1.3.1** promotes the democratization of culture, and supports social inclusion.
- 1.3.2** adopts measures that provide for physical, social, intellectual, cultural, and economic accessibility to all of its activities, including virtual presentations.

1.4 CULTURAL DIVERSITY

The museum institution:

- 1.4.1** respects, protects, and develops the diversity of cultural expression.
- 1.4.2** contributes to the flourishing of cultural expression, including advocating for freedom of thought, expression, and information.
- 1.4.3** strengthens ties with the community by promoting cultural interaction.

2.

GOVERNANCE AND LEGAL FRAMEWORK

The museum institution:

- 2.1** defines and makes public its legal status, mission, values, policies, and objectives.
- 2.2** adopts governance principles recognized and adopted by its Board of Directors.
- 2.3** clearly defines the roles and responsibilities of its Executive Director and Board of Directors.
- 2.4** manages its assets and activities in a cohesive and transparent manner.
- 2.5** develops risk management mechanisms, including those related to financial management, human health and safety, and protection against loss.
- 2.6** respects its obligation to account for the use of public funds.
- 2.7** complies with the legal requirements concerning the management of a not-for-profit corporation in Québec, where applicable.
- 2.8** complies with the laws of Québec and Canada, as well as the international conventions that govern museum practices.
- 2.9** encourages its staff, administrators, and volunteers to understand and apply the *Code of Ethics for Museums*.

3.

FUNCTIONS AND ACTIVITIES OF MUSEUMS

3.1 MANAGEMENT OF THE MUSEUM INSTITUTION

The museum institution:

- 3.1.1** adopts a policy for human resources management, and updates it regularly.
- 3.1.2** manages its assets appropriately, including real estate and movable property, as well as environmental and safety systems, in accordance with applicable museum standards.
- 3.1.3** has adequate insurance coverage for the safety of persons and property under its care, and liability insurance for its directors.
- 3.1.4** adopts an emergency plan.
- 3.1.5** takes appropriate measures to ensure workplace health and safety.
- 3.1.6** establishes rules and procedures for determining the scope and limits of the business and philanthropic activities it proposes, ensuring that such activities do not conflict with its mission and values.

3.2 MANAGEMENT OF COLLECTIONS

The museum institution:

- 3.2.1** adopts and regularly updates a management policy for the collections in its care, including an acquisition policy and a disposal policy.
- 3.2.2** ensures that its acquisitions are aligned with its mission and consistent with its acquisitions policy.
- 3.2.3** develops its collections in consideration of the collection spheres of other Québec museum institutions.
- 3.2.4** ensures an awareness of the provenance of the objects and/or specimens considered for acquisition purposes.
- 3.2.5** does not engage, directly or indirectly, in the illicit trade of objects and/or specimens.
- 3.2.6** complies, when in the possession of an illicitly exported or transferred object and/or specimen, with the laws and international conventions governing the restitution of cultural property and the protection of species.
- 3.2.7** does not engage in the overbidding of objects and/or specimens on the market or the overvaluation of the market value of objects and/or specimens it is offered.
- 3.2.8** offers objects and/or specimens that it does not want to other museum institutions first. It then offers the last owners or rights holders the opportunity to acquire such objects and/or specimens, at their fair market value.
- 3.2.9** does not permit a Member of its Board of Directors, an employee, a contractor, a volunteer or any person representing it to acquire an unwanted object and/or specimen, unless the disposition is made by public sale.
- 3.2.10** uses funds from disposition-related revenues for the development and preservation of its collections.

- 3.2.11** only acquires objects and/or specimens that it can properly store, preserve, protect, document, and display.
- 3.2.12** ensures the application of principles of preventative conservation, and a restoration program for its collections.
- 3.2.13** adopts a program designed for the care of living collections, and ensures the welfare of any animals in its care.
- 3.2.14** makes the objects and/or specimens of its collections and related documentation accessible, while respecting the rules of confidentiality, preventative conservation, and security.
- 3.2.15** ensures the appropriate storage, conservation, security, and display of objects and/or specimens it has been loaned.

3.3 RESEARCH

The museum institution:

- 3.3.1** participates in the advancement of knowledge by encouraging research.
- 3.3.2** respects all copyrights related to research and/or commissions it carries out.
- 3.3.3** respects the environment and applicable laws when conducting field research.
- 3.3.4** adopts a research protocol that complies with the ethical principles of research on humans and living collections.
- 3.3.5** ensures that, when researching a living person, that the said person is aware of the nature of the work, and that his or her consent is free and informed. It also respects the individual's right to withdraw such consent at any time.
- 3.3.6** respects the confidential nature of information collected in the course of research. Where appropriate, it protects the anonymity of those participating in the research, and protects information about their private lives.
- 3.3.7** ensures, when researching a cultural community or other community, respect for the cultural particularities of such groups.
- 3.3.8** ensures, when conducting research on Indigenous peoples, that their representatives have given approval, involves them in the research process, and respects their cultural particularities and various rights.

3.4 DISSEMINATION

The museum institution:

- 3.4.1** ensures that the content it disseminates is based on rigorous research and is consistent with cutting-edge knowledge.
- 3.4.2** ensures that all of its dissemination activities (exhibitions, mediation, educational and cultural activities, publications, etc.), including webcasting, respect its mission and values.
- 3.4.3** responds to the needs of different audiences, and tailors its activities accordingly.
- 3.4.4** encourages virtual access to its content.
- 3.4.5** adopts and periodically revises its copyright policy.
- 3.4.6** obtains the consent of individuals whose image or voice it disseminates in accordance with recognized practices.
- 3.4.7** only exhibits objects and/or specimens for which it can testify as to authenticity and provenance, except for fakes and/or reproductions, which are clearly identified as such.
- 3.4.8** presents human remains and sacred objects in accordance with professional standards and with respect for human dignity.
- 3.4.9** addresses, in a diligent, respectful, and sensitive manner, any requests to remove public displays of human remains or objects of a sacred nature.
- 3.4.10** ensures that it provides adequate conditions for living collections, and meets recognized standards when handling and presenting them to the public.
- 3.4.11** encourages citizen involvement through action, brainstorming, and connections between stakeholders.

3.5 COMMUNICATIONS AND COMMERCIALIZATION

The museum institution:

- 3.5.1** ensures that its communications efforts respect its mission and ethical rules and regulations.
- 3.5.2** adopts a policy for institutional communications, and ensures that it is respected on social networks, or on any other technological platform.
- 3.5.3** positions itself with respect to its cultural, touristic, and regional environment.
- 3.5.4** promotes and markets its offerings in accordance with its mission and values.
- 3.5.5** ensures that any derivative product it markets respects copyrights, including moral rights, and that these rights have been negotiated and recorded in legal contract.
- 3.5.6** respects the ethics of living matter and nature with regards to any derivative product that it markets.

4.

RESPONSIBILITIES TOWARDS THE PUBLIC

The museum institution:

- 4.1** respects its fundamental mission in serving and developing society.
- 4.2** addresses all audiences without discrimination, and taking into account their specificities.
- 4.3** ensures that the information provided to the public is accurate, and that it does not encourage prejudice, stereotypes or discrimination.
- 4.4** responds diligently to any complaint made against it.
- 4.5** recognizes the public's right to information, and makes available its collections, documentation, and research results, subject to confidentiality and security restrictions.

5.

OBLIGATIONS REGARDING STAFF AND COLLEAGUES

The museum institution:

- 5.1** recognizes the importance of its human capital.
- 5.2** employs qualified staff with skills that meet the requirements of the museum profession.
- 5.3** respects the expertise of its staff and collaborators.
- 5.4** provides its staff with adequate conditions to perform its duties and the opportunity to acquire or maintain the expected skill levels.
- 5.5** encourages the training and professional development of its staff and collaborators.
- 5.6** encourages the exchange of ideas, and recognizes the contribution of its staff and collaborators.
- 5.7** recognizes duly formed organizations of employees.
- 5.8** facilitates the activities of volunteers, and recognizes their contributions.
- 5.9** encourages its staff and collaborators to participate in the activities of professional associations.
- 5.10** ensures that working relationships and lines of communication between directors, the administration, employees, consultants, and volunteers are clearly defined.
- 5.11** respects equal-opportunity hiring.

6.

LINKS WITH THE MUSEUM NETWORK

The museum institution:

- 6.1** works in collaboration with other museum institutions, while preserving its autonomy.
- 6.2** encourages the sharing of information of particular interest to the museum network.
- 6.3** avoids making a value judgment about another institution for its own benefit.
- 6.4** fosters the concerted development of its collections alongside other museums.

7.

RELATIONS WITH PARTNERS

The museum institution:

- 7.1** ensures that it establishes its partnerships in accordance with its mission and values, and that they are the subject of duly signed agreements between the parties.
- 7.2** ensures that its mission and values are not compromised by the acceptance of support from any commercial or similar organizations.
- 7.3** asserts independence of action with respect to its sponsors and patrons, while assuming full responsibility for the content of its communications.

PROFESSIONAL ETHICS OF THE INDIVIDUAL

The people who work in a museum institution, whether as employees, contractors, trainees or volunteers, including Board Members, are considered for the purposes hereof as “individuals.”

8.

RESPECT FOR THE INSTITUTION'S PHILOSOPHY

The individual:

- 8.1** respects the mission, mandate, and values of the institution with which he or she is affiliated.
- 8.2** respects the policies, standards, and procedures established by the museum institution in all of his or her activities.
- 8.3** refers to the policies adopted by the museum institution regarding decision-making and/or professional recommendations.
- 8.4** acts as a representative of his or her museum institution in carrying out his or her duties.
- 8.5** is loyal, and respects the reputation of the museum institution with which he or she is affiliated, even after he or she ceases to work in the museum.

9.

PROFESSIONALISM

9.1 COMPETENCIES AND EXPERTISE

The individual:

- 9.1.1** works conscientiously, and provides services of a level of quality that the museum institution is entitled to expect from a competent person.
- 9.1.2** exercises good judgment and diligence in carrying out his or her duties.
- 9.1.3** complies with the laws that govern his or her practice, and respects the *Code of Ethics for Museums*, and that of the professional groups by which he or she is governed.
- 9.1.4** recognizes the limits of his or her professional competencies, and respects those of his or her colleagues.
- 9.1.5** refrains from claiming to have competencies that he or she does not possess, and from expressing a professional opinion if he or she does not have the expertise to do so.
- 9.1.6** relies on honest and objective judgment when formulating professional opinions.
- 9.1.7** informs the authorities at the museum institution concerned should he or she find fake; or illegally transferred, imported, exported or acquired objects and/or specimens.

9.2 CONFIDENTIALITY AND PROTECTION OF INFORMATION

The individual:

- 9.2.1** handles with discretion and does not disclose personal or confidential information obtained in the course of carrying out his or her duties.
- 9.2.2** protects confidential information relating to the objects and/or specimens in collections of the museum institution or those lent to it.
- 9.2.3** does not disclose any information concerning the security arrangements of his or her museum institution, or of any space utilized in carrying out his or her duties.
- 9.2.4** respects the confidentiality of quotes and testimonials he or she collects, and adopts a research protocol that complies with the ethical principles of research on human beings.
- 9.2.5** respects the confidentiality of the information obtained when consulting private archives.
- 9.2.6** ensures, when in the possession of confidential information, that any person concerned is fully informed of the use of said information, knows the nature of his or her involvement, and gives his or her free and informed consent.
- 9.2.7** does not use confidential information obtained in carrying out his or her duties to the detriment of any person who has communicated it to him or her.

10.

RESPONSIBILITIES OF THE INDIVIDUAL

10.1 INTEGRITY

The individual:

- 10.1.1** discharges his or her responsibilities to the museum institution, the public, colleagues, collaborators, and partners with integrity and impartiality.
- 10.1.2** avoids any situation that may give rise to a conflict of interest or the appearance thereof, and informs the appropriate parties if necessary.
- 10.1.3** does not compete with his or her museum institution for the acquisition of objects and/or specimens, or any other institutional activity.
- 10.1.4** refrains from granting or receiving any personal benefit, commission or advantage from the performance of his or her duties.
- 10.1.5** ensures that external influences do not interfere with the performance of his or her duties, and does not benefit from information obtained in the course of his or her duties.
- 10.1.6** does not favour a supplier of goods or services with which he or she has a personal interest, when advising his or her museum institution or the public.
- 10.1.7** retains his or her critical approach in carrying out his or her duties.
- 10.1.8** respects the integrity of his or her colleagues.
- 10.1.9** avoids any form of discrimination as defined in the *Charter of Human Rights and Freedoms*.
- 10.1.10** exercises restraint with respect to his or her personal, political, and religious views in carrying out his or her duties.

10.2 HONESTY

The individual:

- 10.2.1** recognizes when he or she is acting on his or her own behalf rather than on behalf of the museum institution.
- 10.2.2** does not engage in any form of plagiarism, and recognizes copyrights – including moral rights – related to any works involved in carrying out his or her duties.
- 10.2.3** refrains from any comment or action that may be detrimental to the reputation of the museum institution, a peer or colleague, when contributing to any form of communication, including social media.
- 10.2.4** does not misuse the belongings of the museum institution.
- 10.2.5** does not exploit the authority conferred on him or her by his or her functions for personal ends.
- 10.2.6** does not take advantage of the reputation and name of his or her museum institution for his or her personal benefit, or for that of any other person.

10.3 RESPECT FOR THE PUBLIC

The individual:

- 10.3.1** is courteous to the various types of audiences encountered in the course of carrying out his or her duties, and always treats them with respect.
- 10.3.2** respects the cultural and social differences of various audiences, and adjusts his or her behaviour accordingly.
- 10.3.3** takes the necessary measures to avoid endangering the health and safety, or physical and psychological integrity of visitors.

11.

RELATIONS WITH COLLEAGUES AND EXTERNAL CONTACTS

The individual:

- 11.1** maintains relationships based on honesty and respect for colleagues, peers, consultants, and service providers.
- 11.2** promotes cooperation with peers, colleagues, and other museum institutions.
- 11.3** supports colleagues and external contacts, and shares knowledge and professional experience with them.
- 11.4** maintains his or her professional independence and that of collaborators who are called upon to work with a colleague or external party.
- 11.5** respects the reputation of peers and colleagues, and is careful not to denigrate their work or competencies.
- 11.6** relies on personal knowledge of the facts when commenting on the competencies of a peer, colleague, consultant, or the work of a peer reviewer.
- 11.7** respects copyrights – including moral rights – related to work done by peers, colleagues, and consultants.
- 11.8** notifies the person or museum institution in question, concerning any breach of museum ethics, before bringing the matter before a competent body or informing the public.

12.

CONTRIBUTION TO MUSEOLOGY

The individual:

- 12.1** strives for excellence and contributes to the advancement of museology by enriching and communicating knowledge.
- 12.2** supports the development of museology by sharing information and experience with colleagues and peers.
- 12.3** supports any measure likely to improve the quality of services in his or her field of activity.

REFERENCES

[All pages were consulted in June of 2014.]

AAM Code of Ethics for Museums – American Alliance of Museums
<http://www.aam-us.org/resources/ethics-standards-and-best-practices/code-of-ethics>

Charte Musées et développement durable de la SMQ
http://www.musees.qc.ca/pdf/2012_smq_charte_developpement_durable.pdf

Charter of Human Rights and Freedoms
<http://legisquebec.gouv.qc.ca/en/showdoc/cs/C-12>

Cultural Heritage Act
<http://legisquebec.gouv.qc.ca/en/ShowDoc/cs/P-9.002>

Déclaration québécoise Kéroul
<http://www.keroul.qc.ca/declaration-quebecoise.html>

Ethics Guidelines – Canadian Museums Association (CMA)
<https://www.museums.ca/uploaded/web/docs/ethicsguidelines.pdf>

ICOM Code of Ethics for Museums – International Council of Museums
<http://archives.icom.museum/ethics.html>

Sustainable Development Act
<http://legisquebec.gouv.qc.ca/en/ShowDoc/cs/D-8.1.1>

Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans
<http://www.pre.ethics.gc.ca/eng/policy-politique/initiatives/tcps2-eptc2/Default/>

UNESCO Convention on the Protection and Promotion of the Diversity of cultural expressions
<http://www.mrif.gouv.qc.ca/en/rerelations-du-quebec/organisations-et-forums/representation-unesco/diversite-culturelle/convention-unesco>