PARTNER TOOLBOX

Welcome to HM's new partner toolbox! This resource compiles nationally accepted standards and procedures from leading professional organizations for your reference. It contains guidelines and information on many museum practices ranging from crisis management to ADA guidelines to exhibit development.

This resource was developed in response to the most commonly-asked best practices questions by Heritage Montgomery partners. If you have suggested additions, please let us know at director@heritagemontgomery.org.

INTERPRETIVE PLANNING

Interpretive Tools

Harpers Ferry Center
http://www.nps.gov/hfc/services/
Includes information on accessibility, audio visual programs and equipment, cartology, digital media, exhibits, interpretive planning, museum conservation, publications, signs, waysides, and the National Park Service graphic identity and style guides.

Program and Exhibit Evaluation

American Alliance of Museums
https://www.aam-us.org/wp-content/uploads/2024/04/09_Exhibition_TheManyShapesofFormativeEvalution.pdf

Renaissance East of England
https://visitors.org.uk/wp-content/uploads/2014/08/ShareSE_Evaltoolkit.pdf

Exhibit Planning

Smithsonian
https://exhibits.si.edu/wp-content/uploads/2018/04/Guide-to-Exhibit-Development.pdf

National Park Service
https://www.nps.gov/subjects/hfc/upload/NPS-Exhibit-Planning-Design-and-Fabrication-Specifications-2019.pdf

Collections and Collection Management

American Alliance of Museums
https://www.aam-us.org/topic/resource-library/ *(behind membership paywall)*

PastPerfect Collection Management Software
https://museumsoftware.com/

American Institute for Conservation
https://www.culturalheritage.org/

GRAPHICS, PRINTING, AND DOCUMENTATION

Copyright Basics

Copyright Clearance Center
https://www.copyright.com/

Photo Releases

This is a bit of a gray area. On one hand, the law states that any photographs shot at a place where a person has no reasonable right to privacy are acceptable for publication without a signed photo release. On the other hand, it is always best to have a signed photo release for the protection of your organization.

HM follows the National Park Service rule of not showing recognizable faces unless we have a signed photo release. We recommend all members use this guideline. This rule protects both you and your visitors – many parents do not want their child's photograph to be placed where it can be reused by strangers, someone attending a program at your site may not wish to appear on the cover of your next brochure, and so on.

This article provides more information:

When Photographers Need a Photo Release or Use of Likeness
https://www.rocketlawyer.com/business-and-contracts/intellectual-property/releases-and-licensing/legal-guide/when-you-need-a-photo-release

Photo/Art

Here is a list of places where you can search databases for artwork that can be used for free or at a nominal charge. Remember to always credit your sources.

National Archives
http://www.archives.gov/faqs/

Library of Congress
http://www.loc.gov/

National Park Service
https://www.nps.gov/media/multimedia-search.htm

Maryland State Art Collection
https://msa.maryland.gov/msa/speccol/sc1500/sc1545/apc_web/index.html

University of Maryland Libraries
http://www.lib.umd.edu/

The best way to gather images is to keep a camera at your site's entry desk and shoot your own photos. Don't have a camera? Maybe an HM Mini Grant would help out.

Wayside Panel Design

National Park Service
https://www.nps.gov/subjects/hfc/waysides.htm
https://www.nps.gov/subjects/hfc/upload/Wayside-Guide-First-Edition.pdf

MANAGEMENT TOOLS

Emergency Planning and Disaster Mitigation

Maryland Historical Trust
https://mht.maryland.gov/Pages/planning/weatherit.aspx
Includes disaster response and recovery, climate change planning, hazard mitigation planning, and flood mitigation resources.

American Alliance of Museums
https://www.aam-us.org/topic/resource-library/ (behind membership paywall)

National Archives
https://www.archives.gov/preservation/disaster-response/

National Trust for Historic Preservation
https://www.heritagemontgomery.org/wp-content/uploads/2015/10/nthp-treatment-flood-damaged-historic-buildings2.pdf

National Park Service
https://www.nps.gov/museum/publications/mhi/chap10a-b.pdf

Institute of Museum and Library Services
https://www.imls.gov/blog/2017/09/natural-disaster-recovery-resources-museums-and-libraries

Smithsonian National Collections Program
https://ncp.si.edu/PRICE

Museum Safety

American Alliance of Museums
https://www.aam-us.org/wp-content/uploads/2018/01/suggested-practices-for-museum-security.pdf

Museum Management

American Alliance of Museums
http://www.aam-us.org/resources/bookstore

Core Standards for Museums
http://www.aam-us.org/resources/ethics-standards-and-best-practices/standards

Public Trust and Accountability Standards

https://www.aam-us.org/programs/ethics-standards-and-professional-practices/public-trust-and-accountability-standards/

Society of American Archivists

http://www2.archivists.org/groups/museum-archives-section/standards-best-practices-resource-guide#.V31S-fq4yL1w

National Park Service

http://www.nps.gov/dscw/publicforms.htm

Historic Preservation Standards and Guidelines

https://www.nps.gov/subjects/historicpreservation/standards.htm

American Association for State and Local History

http://download.aaslh.org/AASLH+Statement+of+Standards+and+Ethics+-+Revised+2018.pdf

American Historical Association

https://www.historians.org/teaching-learning/standards-and-guidelines-for-the-discipline/

Request for Proposals Template

This is a good template. It's very dense as far as information required, but a good place to start with cutting back and tailoring it to your needs.

http://www.nps.gov/dscw/upload/DB-RFP-RequestForProposal_Template_8-6-13.doc

Accessibility Resources

American Alliance of Museums

https://www.aam-us.org/category/diversity-equity-inclusion-accessibility/accessibility/

Association of Science-Technology Centers

https://www.astc.org/digital-accessibility-toolkit/accessibility-matters/

U.S. Department of Transportation

https://www.transportation.gov/accessibility

Smithsonian

https://www.si.edu/Accessibility/SGAED

U.S. Department of Justice

https://archive.ada.gov/business/museum_access.htm

Diversity, Equity, and Inclusion

American Alliance of Museums
https://www.aam-us.org/programs/advocacy/diversity-equity-accessibility-and-inclusion-2/

Volunteer Management

American Association for Museum Volunteers
https://aamv.wildapricot.org/Standards-and-Best-Practices

Museum Sustainability

Smithsonian
https://www.sustainability.gov/pdfs/si-2022-sustainability-plan.pdf

Victoria & Albert Museum
https://www.vam.ac.uk/blog/design-and-society/how-to-write-a-sustainability-plan-for-a-museum

Customer Relationship Databases

Hubspot
https://www.hubspot.com/products/get-started-cr046

Wild Apricot
https://www.wildapricot.com/

Little Green Light
https://www.littlegreenlight.com/donor-database/

Salesforce
https://www.salesforce.com/

Tessitura
https://www.tessitura.com/features

Other Resources: Standards

Principles and Standards of the Oral History Association
https://oralhistory.org/principles-and-best-practices-revised-2018/

Principles and Standards for Federal Historical Programs of the Society for History in the Federal Government
https://shfg.wildapricot.org/Historical-Programs-Guide

Parks Canada Guiding Principles and Operational Policies
https://parks.canada.ca/agence-agency/bib-lib/politiques-policies/gestion-management/princip

Other Resources: Ethics

Society of American Archivists' Code of Ethics for Archivists
https://www2.archivists.org/statements/saa-code-of-conduct

International Council of Museums' Code of Ethics
https://icom.museum/en/resources/standards-guidelines/code-of-ethics/

American Association of Museums' Code of Ethics for Museums
https://www.aam-us.org/programs/ethics-standards-and-professional-practices/code-of-ethics-for-museums/

CMA Ethical Guidelines of the Canadian Museums Association
https://www.museums.ca/site/aboutthecma/newsandannouncements/september12023b

Code of Ethics of the Canadian Association for Conservation of Cultural Property and of the Canadian Association of Professional Conservators
https://capc-acrp.ca/en/what-is-conservation/publications/code-of-ethics-and-guidance-for-practice

Code of Practice of the Professional Historians' Association of New Zealand/Aotearoa
http://phanza.org.nz/wp-content/uploads/2022/02/Code-of-Ethics-and-Professional-Practice-ratified-8-December-2021.pdf